

Pembina Trails Joint PD Fund 2018 – 2019

Frequently Asked Questions

In the interest of enhancing professional growth, an annual fund determined by the Collective Agreement is available to Pembina Trails Teachers' Association members for the purposes of Professional Development.

General Questions about the Joint PD Fund:

1. Where does the money come from for the Joint PD Fund?

Joint PD funds are set out in Article 7.5 of the Collective Agreement.
<http://www.ptta.ca/collective-agreement.html>

2. How much money is in the Joint PD Fund?

The 2018 - 2019 Joint PD Fund is \$481,483.00.

3. What happens if the funds aren't used in a given year?

Funds not used in a given year are considered surplus funds and are rolled into the next year's budget.

4. Who administers the Joint PD Fund?

The fund is administered by the Management Committee with equal representation from PTTA and the Pembina Trails School Division. The Joint Management Committee meet six times per year.

5. Who may apply to the Joint PD Fund to participate in a PD opportunity?

PTTA Members (general or term contract) have the right to apply to the Joint PD Fund for financial support (July 1 – June 30) as outlined in the four individual categories. An Application to Category 5 (Additional Opportunity for University Coursework) can be made only after exhausting approved funding in Category 2.

6. Can term teachers or substitutes apply to the Joint PD Fund?

If a teacher is on a contract with Pembina Trails School Division and is a PTTA member then they may apply. However, the PD event must occur during the time while on contract.

7. If I am on Maternity or Paternity Leave can I still apply to the Joint PD Fund?

Yes, you are still an employee of Pembina Trails School Division when you are on Maternity and Paternity Leave.

8. How many teachers can apply for the same PD event in the same school?

It is strongly recommended that all applicants discuss their PD event plan with their principal/supervisor before applying. The decision is determined by them before applications are sent to Iain Riffel, Assistant Superintendent of Programs. Being able to attend may depend on how many teachers will be out of the school at that time, school events or time of year. It is recommended that you apply early.

9. What type of PD opportunities can I apply to?

PD opportunities should relate to professional assignment, related activities as part of professional assignment, subject area and/or personal Professional Growth Model (PGM) plans which may include Divisional, School, or Individual Goals. When considering a PD opportunity, you may be thinking of goals for this year, next year or a five year goal you are planning on. You may be thinking about a future change in your assignments, type of school or student demographics and student needs.

10. Can I be told to apply to the Joint PD Fund?

NO! The Joint PD Fund is designed for autonomous PD that is teacher directed and no member should be signed up, pressured or 'voluntold' by their principal/supervisor or colleagues to apply to the fund in order to attend a PD activity or participate for any PLTs. Any PD that a principal/supervisor wishes you to take need to be funded from other sources.

11. How do I apply to the Joint PD Fund?

Applications can be completed and submitted using divisional or personal computers outside of the divisional network.

*Please note: It is necessary to use Internet Explorer not Microsoft Edge.

Go to the Pembina Trails website <http://www.pembinatrails.ca/> . Click on 'Staff' then click on the 'Joint PD Fund' on the menu on the right side. Click on the 'click to access the Online Joint PD Application'. Follow prompts and fill in each question. Information can be saved. You must attach and upload documents for your PD that offer a description of the event which may include: the registration application, mandate/goals/agenda, keynote speakers.

12. What should I do if while I am working on the online application, I can't see any 'Update Status' or the 'Cancel' buttons.

Be sure to set the zoom on your screen to 100% or less so you can see the Update Status and Cancel buttons. If you're in Internet Explorer you should be able to find this in the top right corner in the drop down for Page. If you're in Chrome you should see 3 vertical dots in the top right corner. Click those dots and set the Zoom to 100%

13. When can I make an application for the following year?

You can fill out an application for the following year at any time. Your PD activity will be processed when it is received and be charged to next year's budget and any changes made to that year will be applied.

14. Can I submit a late application to the Joint PD Fund?

No. All application deadlines are firm - no exceptions are made.

15. What if I submit my application but miss the intended Application Due date?

Your application will be held until the next Application Due Date.

16. What should I do if the PD Activity takes place before the next Application Due date?

As long as your application is *submitted* before the start date of the PD activity you can still apply to the fund. However, if you do not submit your application on time, it could mean that you would miss the activity/conference/course date and would not be approved for funding. Please Note: Attending the PD activity before receiving approval means you are taking a chance that your application may not be approved and you would not receive the financial support for it.

17. How do I withdraw an application?

Contact Rachel Hallson at rahallson@pembinatrails.ca and let her know you will need to withdraw your application. This applies to applications that are pending approval by the Joint PD Committee and applications that have already been approved.

Please Note: There is no penalty for withdrawing an application. If attending the PD is really important, you may check with your principal/supervisor to see if they can assist in supplying funds, check for other sources of financial assistance or pay for the PD opportunity yourself. *If you do pay for a PD registration yourself, you may be able to apply a portion on your income tax, so you may want keep your receipts and check with your financial advisor. However, you are not to apply any this to your taxes if the Joint PD Fund or other sources paid for the registration. It is your responsibility to check the rules.

18. How will I know if my application was received?

Once you have submitted your application and it has been forwarded by your principal/supervisor, you will receive a confirmation email.

19. How will I know if my application request was approved?

When the application has been approved by the Management Committee you will get a confirmation email. Applicants will receive written notice sent to their worksite within two weeks of the Joint PD Management Meeting.

20. How will I know if my application was denied?

Iain Riffel, Assistant Superintendent of Programs, will contact applicants directly if applications are denied and/or a letter will be sent to the applicant within two weeks of the Joint PD Management Meeting.

21. Who books the substitute I will need while participating on the PD activity?

Discuss this with your principal/supervisor, but generally you would be responsible for booking the substitute needed to fill your absence. It is a good idea to book your substitute early.

Please note: All absences for the Joint PD must be entered into Smart Find Express even if no sub is required. Select the absence reason **Joint PD** and enter the approval number you receive in the **Approval Comment** box. If no approval number has been received enter "approval from Committee pending."

22. I recently completed/attended a professional development activity.

Can I now apply to the fund for reimbursement even though the activity has already taken place?

No. All applications must be received before the Professional Development activity commences. No exceptions will be made.

23. Can I apply on the day before or the same day of the Application Due Date?

Most probably not successfully. It is strongly recommended that you complete your Application form no later than a week before the deadline date (the earliest possible is best) to allow plenty of time for your principal/supervise to complete their portion of the Application and send it in. By leaving it to the last minute you chance missing the deadline which is firmly set. Giving your principal/supervise a 'heads-up' and checking to see that their portion will be completed on time can also be a good idea. It is possible that technical glitches could occur and having a buffer few days is strongly recommended.

24. Can I make changes or alter details on my PD activity after it has been approved?

No. Changes in the details of the PD activity without amending approval from the Management Committee will result in a denial of the claim.

25. Can I apply to more than one category in the same school year?

Yes and No. Categories 2 and 5 can be combined depending on the number of credits you applied for in Category 2 and if your area of study is Resource, Counselling, School Administration, EAL, Exposure French, Teacher Librarian and Indigenous Studies. You can combine Category 4 with any other Category in the same school year. No other categories can be combined.

26. I want to get the Early Bird pricing on a PD activity. Can I pay this before I get funding approval?

Generally speaking, most PD applications are approved if they fit the criteria. However, there is no guarantee in any year that all applications will be approved due to lack of funds, the activity doesn't meet all the requirements etc. so you are taking a chance by booking early. *You can help mitigate this by applying as early as possible to the PD event you wish to participate in.

27. If I am unable to register for the conference indicated on the application I already submitted, can I request a change to my original application?

Yes. Contact Rachel Hallson at rahallson@pembinatrails.ca and Iain Riffel, Assistant Superintendent of Programs, by email at iriffel@pembinatrails.ca to make the change.

28. What should I do if for some unforeseen reason I am unable to participate in the PD activity for which I received approval?

Contact Craig Stahlke, Secretary Treasurer of the Pembina Trails School Division by email at cstahlke@pembinatrails.ca **and** Iain Riffel, Assistant Superintendent of Programs at iriffel@pembinatrails.ca, **and** Rachel Hallson at rahallson@pembinatrails.ca. It is a requirement to inform them that you were unable to attend. Copy your principal/supervisor on

the email. If this is a Category 4 application, also include your Team Leader in the email. Be sure that you cancel any substitute that you may have booked.

29. If I do not have a principal/supervisor, how do I complete the Application form?

On page one of the Application form for the School/Department answer you would need to fill in Human Resource Department (letter/space and case sensitive). At the bottom of the page where it says Administrator/Supervisor click on the arrow then click on the name Iain Riffel. If you encounter difficulties please contact technical support at 204-488-1757.

30. Am I able to make edits on the Online Application?

Edits cannot be made after the Application has been submitted. If you are unsure, save the application and return to it at a later time, then submit it.

31. I accidentally created two identical Applications, what do I do?

Contact Rachel Hallson at rahallson@pembinatrails.ca and indicate which application should be deleted.

32. I am having difficulty applying online. Can you offer any suggestions?

Be sure you are using Internet Explorer and not Microsoft Edge. You might be having an issue if the latest version of Adobe is not updated on the computer you are using. Click on the link to the User Guide on the main log in page for troubleshooting assistance or contact an ITA at 204-488-1767 ext. 1120.

33. How do I get reimbursed from the fund after my PD opportunity?

You can access the claims form by going to the Pembina Trails website <http://www.pembinatrails.ca/index.html> . Click on 'Staff' then click on the 'Joint PD Fund' on the menu on the right side. Then click on the third bullet in the middle that says 'Joint PD Claims Form PDF'. Print a copy and submit the fully completed hard copy Claim Form to the Secretary-Treasurer's Department, Attention: Craig Stahlke at the Administration Office as soon as possible AFTER the conclusion of the PD activity but in no case beyond August 31st of the school year in which the approved PD activity was taken. Failure to submit the completed Claim Form on time with all attachments may result in a denial of the claim. Original receipts required must be attached up to the maximum of the support approved by the Management Committee. Once processed, funds will be deposited into your bank account. Questions about claims can be directed to Jeryl Burr at 204-488-1767 ext.1274.

Category 1 – Local and eLearning PD (cannot apply to Categories 2, 3 or 5)
Up to \$400 per year plus the cost of up to three substitute days (can be taken as half days)

QUESTIONS SPECIFIC TO CATEGORY 1

1. Can I apply for more than one local PD event in the same school year?

Yes, as long as the combined total does not exceed \$400.00 or 3 sub days. If it does exceed this amount, you or your school can pay the remainder or provide extra substitute days, if possible. Discuss this with your principal/supervisor.

2. What kind of PD activities can I apply to participate in?

Conferences, workshops, school visits, eLearning, and/or clinics.

Please Note: School visits must be with recognized educators in their field of study and provide a unique and innovative experience. eLearning PD is defined as non-university courses taken online either in real-time or recorded; and must be offered by a recognized educational institute.

3. If I do not need a substitute, should I indicate this on the application form?

Yes, select “zero” in the box that lists the number of substitute days you are requesting.

4. Can I attend a professional development activity rather than attend MTS PD Day?

No.

5. Can I apply to the Joint PD Fund to go to a SAGE for MTS PD Day?

No.

Please Note: If you pay for this PD activity, a portion of your PD cost may be used for your income tax, so you may want to keep all receipts.

6. What expenses can I claim for in this category?

Allowable expenses for this category would be the registration fee and substitute costs and can include related materials required for the activity as well as reasonable meal costs, parking and mileage to the maximum of the \$400.00 allowed for this category.

Category 2 - University Coursework (cannot apply to Categories 1 or 3)

* As per the Collective Agreement, Article 2.5(i) before embarking on either a Post-Baccalaureate or Masters Program, contact Iain Riffel the Assistant Superintendent Programs by email iriffel@pembinatrails.ca or send a hard copy letter through inter departmental mail to the attention of Iain Riffel at the Administration Office.

University Coursework

Up to \$400 for 3 credit hours (1 course), \$800 for 6 credit hours (1 full or 2 half courses) up to a maximum of \$1,200 or 9 credit hours per year. Additional coursework, if applicable, may be supported by Category 5.

Masters Program

Up to \$1,500 per year (2 year maximum) plus one year of Continuation fees up to \$600.

- Required textbooks and materials are an allowable expense to the maximum of the \$1,500 allowed in this category.
- Mileage or meal expenses are not allowed in this category.
- Fees for health/dental coverage charged by the university are not an allowable expense.
- If a member misses applying for the first year in the Master's Program, they may still apply for a second year. However, they would only be eligible for one year of support plus one year of Continuation Fees.

QUESTIONS SPECIFIC TO CATEGORY 2

1. What should I put in my letter to the Assistant Superintendent before I begin to take courses for a Post-Baccalaureate or Master's Program?

State your name, the school you are working at, the university you will be enrolling in, the name of the program you will enrolling in and the year you hope to complete the program.

2. When can I apply to the Joint PD fund for a course?

You must apply and your application must be forwarded by your principal/supervisor to Joint PD HR before the start date of the course. Your application will go to the next scheduled meeting date for consideration.

3. What supporting documents are eligible for my application?

You must provide a course description from the institution of study that confirms the course name and number, the number of credit hours of the course and the start date(s). Do not include an account summary. Your application may be denied without the pertinent required information.

4. My university course starts before the first meeting of the school year. If I missed applying before the course started can I still apply to the fund in September?

Yes, but your application must be received before the first meeting date (usually in October) to be considered. **Note:** This exception is only allowed for courses that begin in September.

5. If I am registering for course(s) at the University of Manitoba or the University of Winnipeg, should I opt out of the university's Health/Dental plan?

As an employee of Pembina Trails School Division, who already has a mandatory Health and Dental plan, you are **required** to opt out of the university's plan if you are registering in the **Fall Term only** and you are taking **6 or more credit hours** of courses. You must do this by the date indicated by your university. The Joint PD Fund will not reimburse its members for this fee if you do not opt out in time. For teachers registering for 3 credit hours or less, or 6 credit hours or more, at any other time during the year, you have no choice but to pay this fee. In this case, the Joint PD will reimburse you for this amount as long as it is within the maximum allowances.

6. I am enrolled in a Pembina Trails Cohort. Do I still need to fill out an application form?

Yes.

7. When can I submit a claim for university coursework?

Once the course is underway or after it has been completed.

8. How are Masters Fees paid?

You can receive \$1,500 for each of your two years of a Masters program. You must apply for this each year. You may also apply for one year of Continuation fees up to \$600.

9. When can I utilize Category 5?

After 9 credit hours are completed an additional request for reimbursement may be made, to the maximum of \$400 for one additional 3 credit hours course. To be eligible, only coursework towards obtaining qualifications for Resource, Counselling, School Administration, English as an Additional Language, French: Communication and Culture, French Immersion and Teacher Librarian will be considered.

Category 3 – Non-Local PD Opportunities (cannot apply to Categories 1, 2 or 5)

Up to \$1,800.00 plus the cost of up to three substitute days.

The Canadian per diem \$60.00.

The US per diem \$80.00.

QUESTIONS SPECIFIC TO CATEGORY 3

1. How often can I apply to Category 3?

Applicants are eligible to apply to this category once every 2 years.

2. How far from the city must the PD activity be?

The PD opportunity must be greater than 75 km from the perimeter of the City of Winnipeg.

3. Can I apply to a one-day PD event for this category?

No. The PD opportunity must be at least two days in duration excluding travel time.
Please Note: you can use one of your substitute days as a travel day.

4. Do I need to upload information with my application?

Yes you must upload and attach conference and registration information (from posters/brochures/websites). *Your application will be denied without uploading the pertinent information required.

5. What type of PD opportunities can I apply to in this category?

Eligible PD opportunities include: National or International conferences, workshops, school visits and/or clinics.

Please Note: School visits must be with recognized educators in their field of study.

6. Should I book a flight for my PD event before I have been approved?

Generally speaking, most PD applications are approved if they fit the criteria. However, there is no guarantee in any year that all applications will be approved due to lack of funds, activity doesn't meet requirements etc. so you are taking a chance by booking early. *You can help mitigate this by applying as early as possible to the PD event you wish to participate in.

7. I was wondering whether or not receipts need to be kept for the per diem for Category 3 conferences?

No.

8. Who would book the substitute?

Generally, it would be you the applicant, but talk to your administrator. It is suggested that you book your substitute as early as possible.

9. If I don't need a substitute, should I indicate this on the application form?

Yes. Select "zero" in the box that lists the number of substitute days you are requesting.

10. If I don't know the exact costs of my proposed PD event for items such as airfare and hotel, what should I do when filling out my application form?

Please estimate your anticipated costs. When in doubt round up because you will not be reimbursed for an amount higher than your approved amount, even if your receipts total more than what you were approved. The maximum approval for this category is \$1800.

11. What if I need more than 3 sub days?

If your conference is 3 days long and you require travel time, it may be possible to access the School PD fund (speak to your principal about this). Otherwise you should apply to HR for Personal or Recognition Leave.

Category 4 - Professional Learning Teams (PLT)

Up to \$1,500 per team of 2-4 individuals or up to \$2,775.00 per team of 5 or more individuals.

QUESTIONS SPECIFIC TO CATEGORY 4

1. How do I apply to participate in a PLT?

One person on the team needs to be designated Team Leader. That person will complete the Category 4 application on behalf of the team. The Team Leader must ensure the spelling of team members names are accurate and that their correct workplace/school location is selected.

2. If I apply to Category 4 PLT, can I apply to any other categories the same year?

Yes, you can apply to Category 4 and one other category in the same year.

3. Can my Principal/Supervisor or colleagues mandate that I participate in a PLT?

No. Participation in a PLT is completely voluntary and self-directed. At no point should a member be pressured or 'voluntold' to participate. All applicants are requested to discuss their PD participation plan with their Principal/Supervisor before applying.

4. How many times can I apply to a PLT?

You may apply twice a year to participate in a PLT. It is the responsibility of principals/supervisors to monitor this.

Please Note: Compelling exceptions may be considered by the Management Committee on a case by case bases.

5. Can I claim for mileage if participating in a PLT?

No

6. Can educational assistants participate in a PLT with teachers?

Yes they and anyone else (teacher candidates, parents, etc.) may participate in the PLT. However, they are not eligible to apply for funding from the Joint P.D. Fund as only PTTA members may access it.

Please Note: Only PTTA member names are to be listed on the application form.

7. Can part-time teachers participate in a PLT?

Yes. However, should the group decide to meet at a time when a part time teacher is not scheduled to work, they are not eligible for excess time. Whenever possible, groups should meet when all members can attend.

8. What do I need to put in my detailed plan?

In addition to your smart GOAL be sure to include specific learning each participant hopes to achieve.

REMINDER: Category 4 must include PD for teachers and cannot be lesson planning, school goals or administration activities. This category is for teacher learning, not work product. The focus is on learning and growth; at the end of the activity participants should know something, not have a final work product. Applicants are encouraged to utilize learning verbs and smart goals in their application. You can discuss this with your administrator.

9. Do Category 4 PLT participants need to check with their principals about proposed meeting dates?

Teachers planning to participate in a PLC, should discuss this with their principal(s) or supervisors ahead of time, thus minimizing conflicts with the “life of the school” or divisional calendar.

10. Who makes claims for Substitutes?

This will be billed directly from your school by the principal to the Secretary Treasurer’s department. You do not need to do anything, although you may want some input as to which substitute you wish to work in your class-discuss this with your administrator.

11. What is not financially accepted/covered as part of a PLT?

- The fund does not support the purchase of materials for student use. Professional books and materials must be for teacher use only.
- The fund does not cover costs for food or mileage.

12. Who makes claims for Category 4 books?

The Team Leader is the only one who can submit a claim for reimbursement of books.

REMINDER: All books must be for teacher use only.

13. How are funds reimbursed for a PLT?

It is the responsibility of the Project Leader of the Professional Learning Team to download a Claim Form and complete. Receipts may be submitted before the PLT is completed.

http://www.pembinatrails.ca/staff/joint_pd_fund/2015/PD%20Fund%20PLT%20Claim%20Form%202015-16.pdf .

Category 5 – Additional Opportunity for University Coursework (cannot apply to Categories 1 or 3)

Up to \$400

QUESTIONS SPECIFIC TO CATEGORY 5

1. When can I apply to Category 5?

After 9 credit hours are complete in Category 2, you may apply to Category 5 for an additional request for reimbursement to the maximum of \$400 for one additional 3 credit hours course.

2. What courses are eligible in this category?

To be eligible, only coursework towards obtaining qualifications for Resource, Counselling, School Administration, English as an Additional Language, French: Communication and Culture, French Immersion and Teacher Librarian will be considered.

3. What supporting documents are eligible for my application?

You must provide a course description from the institution of study that confirms the course name and number, the number of credit hours and the course and the start date(s). Do not include an account summary. Your application may be denied without providing the pertinent information required.

4. Are textbooks and related course materials allowed as an expense?

Yes. Required textbooks and related course materials are an allowable expense to the maximum of \$400.

5. Can I apply for additional coursework for a Master's Program in this category?

No. Additional coursework of a Master's Program is not supported in Category 5.

6. If I am registering for course(s) at the University of Manitoba or the University of Winnipeg, should I opt out of the university's Health/Dental plan?

As an employee of Pembina Trails who already has a mandatory Health and Dental plan, you are **required** to opt out of the university's plan if you are registering in the **Fall Term only** and you are taking **6 or more credit hours** of courses. You must do this by the date indicated by your university. The Joint PD Fund will not reimburse its members for this fee if you do not opt out in time. For teachers registering for 3 credit hours or less, or 6 credit hours or more, at any other time during the year, you have no choice but to pay this fee. In this case, the Joint PD will reimburse you for this amount as long as it is within the maximum allowances.