



E. T. F. O. Niagara

Elementary Teachers' Federation of Ontario

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R.R. #1

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OPERATING PROCEDURES

E. T. F. O. NIAGARA PROFESSIONAL DEVELOPMENT FUND

GENERAL INFORMATION:

1. The fund will reimburse the professional development expenses, as outlined below, for **courses, conferences, workshops and school/classroom visitations up to a maximum of \$700.00**, incurred over two consecutive school years. Monies shall allocated on a first come, first served basis each year, up to a maximum of the amount available in the fund.
2. All statutory members of the E.T.F.O. Niagara Teacher Local (either active or on a leave of absence) are eligible to apply for funding. Funding is **NOT** pro-rated based on teaching assignment.
3. All funding is on a pre-approval basis. To be eligible for funding, a P.D. Fund Request Form must be **received** by the ETFO office a **A MINIMUM OF ONE (1) DAY PRIOR TO THE EARLIEST START DATE** of the requested PD event. No advance payments will be available from the E.T.F.O. Niagara PD Fund.
4. PD Fund Requests forms are available on our website (www.eftoniag.com) under "Forms." Please allow **at least 5 days for delivery by courier**. Request forms can also be faxed to the ETFO office at 905-892-9733.
5. Approved funding is specific to the Professional Development event listed on the request form.
6. The E.T.F.O. Niagara PD Fund **will reimburse** for:
 - a) registration
 - b) accommodation
 - c) meals- **to a maximum of \$70.00 per day**
 - d) transportation expenses including:
 - bus, train, or airfare tickets to and from a PD event
 - taxi fare to and from one of the terminals to conference site and home
 - mileage (**for the driver only**) at \$0.438/km (excluding courses)
 - parking
 - e) occasional teacher costs, at the rate determined by the Board at the time of the PD event
 - f) dependent care - **if in excess of usual daily expense (up to a maximum of \$50.00 in a 24 hour period)**
 - g) material fees & textbooks that are required for participation in the PD event
7. The E.T.F.O. Niagara PD Fund **WILL NOT** approve funding requests for:
 - a) DSBN mandated PD events (ETFO-DSBN partnership events excepted)
 - b) PD events where attendance is mandated by a superordinate
 - c) requests received later than one (1) day prior to the earliest start date of the PD Event

E.T.F.O. NIAGARA PD FUND OPERATING PROCEDURES - CONTINUED

8. **ORIGINAL receipts** are required for **ALL** expense claims, with the exception of occasional teacher costs (invoiced directly to ETFO Niagara) and mileage.
9. One E.T.F.O. Niagara Vice-President shall administer the fund and shall be responsible to the executive and the membership. There shall be two signing officers of the E.T.F.O. Niagara for all financial transactions.
10. The E.T.F.O. Niagara PD Fund shall pay all operating expenses to maintain the fund.

REQUEST INFORMATION:

1. All requests for funds must be received by the E.T.F.O. Niagara Office A **MINIMUM OF ONE (1) DAY PRIOR TO THE EARLIEST START DATE** for the requested PD event. Requests may be sent to the E.T.F.O. Niagara Office via the Board courier (**allow at least 5 days for delivery**), mail or fax (**905-892-9733**). However when forwarding a request close to the deadline, it is the responsibility of the member to confirm receipt.
2. Upon approval, you will be sent a Confirmation of Approval and a Statement of Expense Claim Form.
3. If you participate in a PD event prior to receiving funding approval, you will be responsible for any/all costs incurred if your request is not granted.
4. Reimbursement will be paid **up to the maximum of the approved amount and only for expense areas originally requested. Be sure to include any possible expenses you may incur, even if they are only an estimate as any expenses incurred beyond those originally requested will not be covered.**
5. **IT IS THE RESPONSIBILITY OF THE MEMBER TO NOTIFY THEIR SITE ADMINISTRATOR IN ADVANCE, REGARDING ANY ABSENCE FROM THE WORKSITE.**

EXPENSE INFORMATION:

1. Within **60 days** of the completion of the PD event members must submit **original** receipts, proof of completion (in the case of courses) and an E.T.F.O. Niagara Statement of Expenses Claim form to the E.T.F.O. Niagara Office. **Original itemized receipts must be provided** and members are specifically prohibited from using any receipts for monies paid by the fund **for the purpose of income tax deductibility**. Photocopies are not acceptable. If notified, E.T.F.O. Niagara may amend the deadline for submission of expenses in extenuating circumstances
2. We require a completed Statement of Expense, even if the the only expense requested was occasional teacher costs (no personal reimbursement is required).
3. **For approved courses**, final expenses will not be paid until documentation regarding successful completion of said course (Grade Statement/Statement of Standing, copy of OTC Record Card, or Certificate or Acknowledgment Letter from the organization responsible for the course), has been received by the E.T.F.O. Niagara Office, along with **original** receipts.

Guidelines effective September, 2009.