



**ELEMENTARY TEACHERS' FEDERATION OF ONTARIO  
- NIAGARA LOCAL -**

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*“Supporting those who make a  
difference in the lives of children”*

**OPERATING PROCEDURES  
E. T. F. O. NIAGARA PROFESSIONAL DEVELOPMENT FUND  
EFFECTIVE September 1, 2015**

**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 be allocated on a first come, first served basis each year, up to a maximum of the amount available in the fund.
  - a) A course is defined as either an Additional Qualifications course or an Additional Basic Qualifications course, as recognized by the Ontario College of Teachers. Effective September 2015, ETFO Niagara will not approve funding for any Principal's Qualification Program courses;
  - b) All conference and workshops will need to directly impact student learning and/or professional practice;
  - c) A classroom visit is defined as the observation of another colleague in a teaching environment in an Ontario classroom;
  - d) Any PD fund request that doesn't fit the parameters listed above may be considered based on their merits on a case-by-case basis.
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, **as well as a poster/flyer/documentation for any course, conference or workshop** must be **received** by the ETFO office 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.etfoniagara.ca](http://www.etfoniagara.ca)) under “Forms and Documents.” **Please be advised that it can take up to 5 working days for delivery by courier in each direction.** Your completed request can also be faxed to the ETFO Niagara office at 905-892-9733, **or scanned and emailed to the PD Fund Administrator ([pd@etfoniagara.ca](mailto:pd@etfoniagara.ca)).**
5. Approved funding is specific to the Professional Development event listed on the request form.

# E.T.F.O. NIAGARA PD FUND OPERATING PROCEDURES

EFFECTIVE September 1, 2015

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6. The E.T.F.O. Niagara PD Fund **will reimburse** for, in order of priority:
  - a) occasional teacher costs, at the rate determined by the Board at the time of the PD event;
  - b) registration;
  - c) material fees & textbooks that are required for participation in the PD event;
  - d) dependent care - **if in excess of usual daily expense (up to a maximum of \$50.00 in a 24 hour period)**;
  - e) 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 the current ETFO Niagara Mileage rate (excluding courses); parking;
  - f) accommodations;
  - g) meals - **to a maximum of \$70.00 per day.**
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;**
  - d) **any Principal Qualifications Program courses.**
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. **In the event that an application is denied, a member may appeal the denial in writing to the ETFO Niagara Executive within ten (10) school days of being notified of the denial. The appeal will be heard at the earliest Executive meeting possible, and the ETFO Niagara Executive will decide to either uphold or reverse the decision of the PD Fund Administrator.**
11. 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 working days for delivery**), email to [vp1@etfoniagara.ca](mailto:vp1@etfoniagara.ca) (signed, scanned and attached), 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.**

# E.T.F.O. NIAGARA PD FUND OPERATING PROCEDURES

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2. Upon approval, you will be sent a Confirmation of Approval and a Statement of Expense Claim Form **via Board email.**
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. If you are approved for funding, but you change the PD event which you are attending without notifying ETFO Niagara in advance, the Local reserves the right to deny reimbursement.**
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 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. ***Please be advised that it can take 3 - 4 weeks to process your refund PLUS an additional 5 working days for delivery by courier in each direction.\****
4. **All requests for reimbursement of expenses, along with any supporting documentation (receipts, proof of completion, Statement of Expense Forms) must be received by the ETFO Niagara office prior to September 30 of the following school year (e.g., for the 2014/15 school year, documentation must be received prior to September 30, 2015.)**

**END**