

# Frequently Asked Questions **Joint PD Fund**

In the interest of enhancing professional growth, an annual fund determined by the Collective Agreement is available to 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>. This section also addresses the total annual amount of the fund.

**2. 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 Joint PD budget.

**3. Who administers the Joint PD Fund?**

The fund is administered by the Management Committee with equal representation from the association and the division. The Joint Management Committee meet six times per year.

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

PTTA Members (general or term contract) who are paying PTTA dues 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.

**5. If I am a part-time teacher, is my access to the Joint PD Fund pro-rated to my FTE?**

No. Part-time teachers may apply to any category that fits their Professional Growth Plan. Time spent in the PD activities that fall outside the teacher's regular schedule is considered voluntary and will not qualify for excess time under any circumstances.

**6. 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, as long as you are still a member of the PTTA.

**7. 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 administrator before applying. The decision is determined by your principal before applications are sent to Elaine Egan, Assistant Superintendent Human Resources & Policy.

**8. Can substitute teachers apply?**

Substitutes not on a term contract are not eligible.

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

You must be on a Pembina Trails School Division computer. 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.

**11. 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 Tools. If you're in Chrome you should see three vertical dots in the top right corner. Click those dots and set the Zoom to 100%.

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

You can fill out an application for the following year at any time. Please make sure to select the correct fiscal year based on the start date of your PD. Your application will be processed when it is received and be charged to next year's account.

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

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

**14. What if I submit my application but miss the intended application due date?**

Your application will be held until the next application due date. Since the application must be submitted **before** the PD takes place, this may put you at risk of not receiving funding. In this case you may want to withdraw your application.

**15. How do I indicate if I am receiving funds towards my Joint PD from another source?**

If you are receiving funds from another source (e.g. the school, a government bursary, an outside organization, etc.) you must indicate who the support is from in the *Source(s) of financial support other than Joint PD (if applicable)* box on the first page of the application and how much in the *Total Amount of support from other sources (if applicable)* box. Remember that this amount will be deducted from the **Total Amount** of your expenses.

**16. How will I know if my application was received?**

Once you have submitted your application and it has been forwarded by your administrator/supervisor to Joint PD HR, you will get a confirmation email.

**17. 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 of approval approximately three to five working days after the Management Committee meeting.

**18. How will I know if my application was denied?**

Elaine Egan, Chair of the Joint PD Committee will contact applicants directly if applications are denied or a letter will be sent to the applicant the day following the meeting.

**19. Who books the substitute I will need while participating in the PD activity?**

Discuss this with your administrator, but generally you would be responsible for booking the substitute needed. It is a good idea to book your sub 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.”

**20. 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.

**21. Can I apply on the day before or the same day of the application due date?**

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 administrator 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 firm. Giving your administrator a ‘heads-up’ and checking to see that their portion will be completed on time can also be a good idea.

**22. 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.

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

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 and Teacher Librarian. You can combine Category 4 with any other category in the same school year. No other categories can be combined.

**24. 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, 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.

**25. 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 Elaine Egan, Assistant Superintendent Human Resources & Policy, by email at [eegan@pembinatrails.ca](mailto:eegan@pembinatrails.ca) to discuss potential changes.

**26. 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](mailto:cstahlke@pembinatrails.ca) **and** Elaine Egan, Assistant Superintendent Human Resources & Policy at [eegan@pembinatrails.ca](mailto:eegan@pembinatrails.ca), **and** Lori Gillespie, Admin. Secretary to Elaine Egan at [lgillespie@pembinatrails.ca](mailto:lgillespie@pembinatrails.ca). It is a requirement to inform them that you were unable to attend. Copy your administrator/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.

**27. If I do not have an administrator, how do I complete the application form?**

On page one of the application form for the School/Department field, type in Human Resource Department (letter/space and case sensitive). At the bottom of the page where it says Administrator/Supervisor, click on the drop down arrow then click on Elaine Egan. If you encounter difficulties please contact tech support at 204.488.1767 Ext. 1120.

**28. Am I able to make edits on the online application?**

Application information can be saved and edited while you are completing the form. However, edits cannot be made once you have submitted your application.

**29. I accidentally created two identical applications, what do I do?**

Contact Lori Gillespie at [lgillespie@pembinatrails.ca](mailto:lgillespie@pembinatrails.ca) and indicate which application should be deleted.

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

You must log in to the Joint PD application from a divisional computer. There might also be 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 login page for troubleshooting assistance or contact an ITA at 204.488.1767 Ext. 1120.

**31. 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 31 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. You will receive an email titled VPAY to inform you of the deposit. The process may take up to 6 weeks. Questions about claims can be directed to Jeryl Burr at 204.488.1767 Ext.1274.

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**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 or three sub days. If it does exceed this amount, you or your school can pay the remainder or provide extra sub days, if possible. Discuss this with your administrator.

**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) Can I attend a professional development activity rather than attend MTS PD Day?**

No.

**4) Can I apply to the Joint PD Fund to go to a SAGE for MTS PD Day?**

No.

*Please Note:* A portion of your PD cost can be used for your income tax, so keep all receipts.

**5) 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 allowed for this category.

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**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 Elaine Egan, Assistant Superintendent of Human Resources & Policy by email [eeagan@pembinatrails.ca](mailto:eeagan@pembinatrails.ca) or send a hard copy letter addressed Attention: Elaine Egan on the envelope and send it to the Administration Office through inter-divisional mail.

**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 Masters 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 Masters 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 administrator/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) 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.

**4) 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.

**5) I am enrolled in a course sponsored by Pembina Trails. Do I still need to fill out an application form?**

For participants in a Special Ed. cohort, or taking Cognitive Coaching as part of a Leadership Development cohort, applications need to be completed.

**6) When can I submit a claim for university coursework?**

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

**7) 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 in the third year for Continuation Fees up to \$600.

**8) 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 hour 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, Teacher Librarian and Indigenous Education will be considered.

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

Up to \$1,400 plus the cost of up to three substitute days.

**QUESTIONS SPECIFIC TO CATEGORY 3**

**1) How often can I apply to Category 3?**

Applicants are eligible to apply to this category once every two 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 sub days as a travel day.

**4) 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.

**5) 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.

**6) 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.

**7) 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 on your application. When in doubt round up because you will not be reimbursed for an amount higher than your approved amount. All applications must be made in Canadian dollars. The maximum approval for this category is \$1400.

**8) Do I need to include receipts when submitting a claim?**

Detailed receipts must be included with the claim form with the exception of per diem items for Category 3 conferences (e.g. do not include restaurant receipts). All claims must be in Canadian dollars.

**9) What if I need more than three sub days?**

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

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**Category 4 - Professional Learning Teams (PLT)**

Up to \$1,500 per team of 2 to 4 individuals or up to \$2,575 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 administrator mandate that I participate in a PLT?**

No. Participation in a PLT is completely voluntary. All applicants are requested to discuss their PD participation plan with their administrator before applying.

**4) How many times can I apply to a PLT?**

You may apply twice a year to participate in a PLT. Administrators monitor this. **Please Note:** Compelling exceptions may be considered by the Management Committee on a case-by-case basis.

**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 PD Fund as only PTTA members may access.

**Please Note:** Only PTTA member names are 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) Do Category 4 PLT participants need to check with their principals about proposed meeting dates?**

It would be appreciated by the administrators in schools in which teachers are taking part in the PLT, to ask their principal ahead of time, thus minimizing conflicts with the “life of the school.”

**9) 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.

**10) 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. Reimbursement of book costs may be claimed (with receipts) before the PLT ends.

**11) How are funds reimbursed for a PLT?**

It is the responsibility of the Team Leader of the PLT to download a Claim Form, complete it and submit to Secretary Treasurers Department.

<https://ewww.pembinatrails.ca/Documents/PD%20Fund%20Claim%20Form.pdf>.

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**Category 5 – Additional 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, Indigenous Education and Teacher Librarian will be considered.

**3) 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, including tuition.

**4) 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.