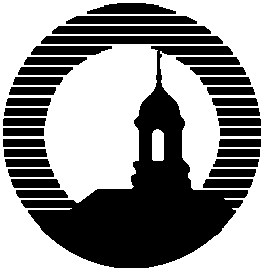
**MAMARONECK UNION FREE SCHOOL DISTRICT**

**PROFESSIONAL ENRICHMENT FUND BOOKLET**

**(Revised: October 2017)**



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**SECTION 1**

**PROFESSIONAL ENRICHMENT FUND CALENDAR/TIMELINE**

|  |  |
| --- | --- |
| **ACTUAL COMMITTEE MEETING DATE** | **DEADLINE TO SUBMIT APPLICATION** |
| **November 13, 2017** | **November 10, 2017** |
| **December 5, 2017** | **December 4, 2017** |
| **January 9, 2018** | **January 8, 2018** |
| **February 6, 2018** | **February 5, 2018** |
| **March 12, 2018** | **March 9, 2018** |
| **April 16, 2018** | **April 13, 2018** |
| **May 7, 2018** | **May 4, 2018** |
| **June 5, 2018** | **June 4, 2018** |

**Please Note: Proposals for National Conferences must be submitted one month in advance.**

 The electronic application is available on the district website: [www.mamkschools.org](http://www.mamkschools.org/) in the Staff Resources section under the Tools tab.

 Please notify the PEF Committee if your approved activity is canceled. This will allow the Committee to reallocate these funds for use in upcoming requests.

**What is PEF?**

The Professional Enrichment Fund has been established to promote wider participation in professional development opportunities provided by out-of-district organizations. The PEF was created as a result of negotiations to the Collective Bargaining Agreement between the Mamaroneck Board of Education and the Mamaroneck Teachers’ Association.

This fund will replace the M+60 Grant and Summer Stipend previously administered through the Mamaroneck Teachers’ Institute. In the past, teachers who had already accrued more than sixty credits toward salary increment could opt to apply for a stipend to cover expenses to attend professional conferences. This stipend was in lieu of in-service credits.

Through the new fund, all MTA members, regardless of the number of credits accrued toward salary increment, can receive district support to attend professional conferences, seminars, workshops, or courses that contribute to furthering their knowledge of their field. Proposals to engage in curriculum enhancement may also be considered. Each member can apply for a maximum of $3,000 in professional funds over the three years remaining in the current contract to cover one or more professional development activities. The annual allocation for the fund is $30,000. The support can cover registration fees, and some travel costs, as well as an established meal allowance. All permissible costs are outlined in Section 2: “Board Policy #6830, Reimbursements for Travel and Conference Expenses”. Again, these funds are in lieu of in-service credit.

The Office of the Administrator for Personnel will administer the PEF. Members must apply for these funds in a timely manner, allowing applications to be reviewed for approval well before the conference starts.

The application form can be found and completed on the school website by accessing under “Staff and Students”, “*Staff Links”*, then *Application for Professional Enrichment Fund*.

**How are applications approved?**

Four positive votes from the Committee are needed for an application to be approved. The Committee may recommend changes, deletions or additions in an application in order to obtain the required four votes.

**How does the committee decide?**

The primary consideration is the merit of the application. However, since funds are limited, the committee tries to distribute funds equitably among staff members and buildings. An applicant’s history of PEF funding will be considered in reviewing a proposal.

Among the factors considered by the Committee in reviewing applications are:

1. The merits and costs of the activity and its applicability to the applicant’s teaching assignment and area of certification.
2. The quality of the content of both the PEF application (Description of Activity, Purpose of Proposal and Follow-Up/Evaluation) and the quality of the actual activity.
3. Prior PEF funding of the applicant, both total funding and within the current funding year.
4. The effect which large numbers of teachers requesting a PEF activity in a building and/or department has to be the overall functioning of that building, department and district. The PEF Committee recommends that teachers communicate amongst themselves whenever possible as to the number of individuals who will apply in a building and/or department.
5. Length of service of the applicant in relation to total prior funding.
6. The teacher’s overall attendance will be a consideration for approving grants.
7. An applicant’s membership in the professional organization of the conference applied for.
8. An applicant’s status as an officer of a professional organization or as an organizer or presenter at a conference.
9. The number of times an applicant has attended the same conference.
10. Generally, the Committee will not look favorably upon the application of an applicant who has prior PEF approval of three days out of the classroom.
11. Preference given to local, state and regional conferences and activities over national/ international conferences and activities when travel costs to more distant conferences are not commensurate with relative benefits derived by either the district or the individual.
12. Generally, the Committee will not look favorably upon summer applications that conflict with summer district employment.
13. There must be evidence that proposals for curriculum enhancement do not duplicate work available either in the district or from publishers.
14. It is expected that the timeframe suggested for curriculum enhancement projects be commensurate with the work proposed.

**Applying for PEF Funds**

1. The PEF application is available on the district website.

2. All requests must be made at least one month in advance of the conference date.

3. Submit applications with only one name on each application. If you intend to share a room or an automobile with someone else indicate so on your application. However, bear in mind that one person may be approved for an activity while another is denied approval.

4. The main purpose of each application is to increase the professional development and skills of the teacher within the framework of the district, building, PDP and APPR goals and objectives. Each applicant, therefore, must clearly articulate the specific benefits which are to be gained toward broadening their professional development in relation to these goals and objectives. In addition, the overall benefits to be gained by the students and the school district must be included.

5. The method used to evaluate the benefits of each proposal along with follow-up activities associated with the application must be clearly delineated in the application.

6. **Reimbursement for expenditures cannot exceed the approved amount in each category. All receipts must be itemized.**

7. Be specific as to dates, times, places and costs associated with the proposal.

8. The first step when a conference is approved by the PEF Committee is to contact your building secretary who will help guide you through the process.

9. The Absence Authorization & Travel Reimbursement Form should be filled out immediately and sent through the signature cycle. The estimated expenses section must be filled out with the estimated costs of all reimbursable items and the budget code that will be used for the reimbursement. If the conference was approved by the PEF Committee, the Purchasing Department will enter the budget code for you; just make a note telling us to use the PEF budget code. This form must be filled out and submitted for all travel even if the conference or athletic event is held on the weekend or during the summer months.

10. Conference Fees should be paid on a Purchase Order whenever possible. Hotel may not accept a purchase order but you can take a district check with you when you go. You can hold the reservation with your credit card and then give them the district check when you check in. The district check will cover room rates, taxes (if the hotel is not in NY State) and any other applicable fees but will not cover phone, internet, movies or any other in room services. **DO NOT use your credit card unless you have written approval from the purchasing agent.**

11. **Air travel:** If air travel is the most economical mode of travel, it may be approved; however, travel by train or car must also be considered and proof of air travel being less than the others must be submitted to the purchasing agent prior to booking any travel. The Purchasing Agent will review with the employee and chose the most economical travel. **DO NOT purchase tickets until you have written approval from the purchasing agent.**

12. **Transportation:** Taxis, subways, parking and trains: Receipts must be submitted for all taxis, subways, parking and trains in order to be reimbursed.

13. **Meals:** Meals are reimbursed as follows: $5.00 for breakfast, $15.00 for lunch and $30.00 for dinner. The district will reimburse no more than a 15% tip. This does not include alcoholic beverages. All receipts must be itemized. **Receipts that are not itemized will not be paid.** The above limits cannot be combined by skipping a meal and spending more at the next meal.

14. **Mileage/Tolls**: Mileage (not gas) will be paid at the rate approved by the Board of Education. This rate may vary from year to year. Round-trip MapQuest printouts must be supplied showing the total miles for reimbursement. Tolls will be paid if receipts are submitted for each toll or an E-ZPass printout is provided with the tolls circled.

15. Rental Cars are not allowed unless advance approval is received by the Assistant Superintendent of Business Operations.

16. Board of Education Policy #6830 dictates the rules and regulations concerning expenses and reimbursements. Please refer to the Board policy in Section 2 for specific guidance and directions.

**Deadlines**

Applications must be submitted by the deadlines stated in the calendar. The Committee needs time before the scheduled meeting to review the applications. The Committee regrets that some teachers may be precluded from attending valuable activities because organizations do not publicize their conferences or workshops early enough for teachers to submit applications in time. **In an attempt to facilitate the processing of paperwork, the PEF Committee requires that all reimbursements be submitted within 15 days after the date of the PEF approved activity. Failure to do so will forfeit your opportunity to be reimbursed for this activity. If the conference receipts are delayed due to the sponsoring agency, you must submit information regarding the delay within 45 days of the completion of the activity.**

**Types of Applications**

Applications should have as their main purpose the improvement of professional skills of teachers. Applications for attending conferences, workshops, graduate courses (no salary increments) conventions and special programs are among the kinds of proposals that have received PEF approval in the past. Any application that meets the main purpose of PEF will be carefully considered by the Committee. Activities where the primary role of the teacher is chaperoning students are not appropriate for PEF funding.

**SECTION 2 – BOARD POLICY #6830**

**REIMBURSEMENTS FOR TRAVEL AND CONFERENCE EXPENSES**

**INTRODUCTION**

The district recognizes that school district employees, school officials and members of the Board of Education will occasionally be required to travel in order to attend job/district related conferences, meetings, conventions, and workshops. The district will provide reimbursement for such travel and travel related expenses in accordance with this policy.

The Board of Education shall determine whether attendance by Board of Education members, at any conference or professional meeting, is in the best interest of the District and eligible for reimbursement of expense under this policy. Conference attendance by Board of Education members shall be authorized by a resolution, following a majority vote of the Board of Education.

The Superintendent of Schools or his/her designee shall determine, whether attendance by district staff at any conference or professional meeting is in the best interest of the district and eligible for reimbursement of expenses under this policy. All claims for conference expense reimbursement by district staff must be accompanied by travel order signed by the superintendent or his/her designee.

Every effort will be made to minimize travel related expense when alternative travel, meal, and accommodation arrangements are available. The district expects that employees will plan ahead when making travel arrangements (lodging and air travel) so as to reduce the expenses associated with these items. The district acknowledges that spouses may, on occasion, accompany a claimant involved in authorized travel. However, the district shall not reimburse any expenses incurred as a result of the spouse’s travel.

**I. PURPOSE**

The purpose of this Policy is to establish criteria for expense prepayment and maximum reimbursement allowances for authorized travel within and outside the district. Actual reimbursement for expenses incurred as a result of travel will be contingent upon the submission of a Claim for Expenses Form supported by appropriate receipts.

**II. PREPAYMENT**

Expenses for an authorized conference should be prepaid by the district. In the event that prepayment by the district is not possible, prior approval from the purchasing agent will be required for reimbursement. This is most applicable in the case of airfare, hotel and conference registration fees. Prepayment will be made upon presentation of the proper information attached to the Conference Request Form at least four weeks prior to the conference.

In the event that the Superintendent of Schools or a designee requests that a staff member attend a conference, the district will prepay registration fees, public transportation costs, and required deposits. All other expenses incurred by those attending a meeting under such circumstances shall be reimbursed in accordance with this Policy.

**III. TRAVEL ALLOWANCE**

There is a maximum allowance of $400 in total per conference/activity. Any amount exceeding this sum will be the responsibility of the attendee.

A. AIR TRAVEL: Reimbursement for authorized air travel will be based upon actual expenses incurred provided the Claim for Expenses Form is supported with original itemized receipts and provided that efforts have been made to minimize air travel expense. Credit card statements will not be sufficient for reimbursement. Employees must work with the purchasing agent to make air travel arrangements.

B. AUTOMOBILE TRAVEL: Reimbursement for authorized automobile travel, utilizing a personal vehicle, will be based upon the Board approved, or contractually approved rate. In the event that repairs to a privately owned vehicle are necessary while involved in authorized surface travel, the cost of such repairs shall not be reimbursable by the district.

**IV. LODGING AND MEAL ALLOWANCE**

A. LODGING: Reimbursement for lodging expenses as a result of authorized travel will be at the actual rate incurred, provided the Claim for Expenses Form is supported by original itemized receipts and provided that the efforts have been made to minimize lodging expenses. For all lodging in New York State, it is the claimant’s responsibility to use the district’s Tax Exempt Certificate. No sales tax will be reimbursed by the employer and credit card statements will not be sufficient for reimbursement.

B. MEALS: Reimbursement for meal expense incurred as a result of authorized travel, is capped and shall not exceed the following amounts: Breakfast $5.00; Lunch $15.00; Dinner $30.00. When meals are included with lodging or included in the conference registration fee, reimbursement for those meals will be excluded. All other meals on the same day will be reimbursed according to the aforementioned schedule. Only one meal per person per meal period will be reimbursed. Alcoholic beverages will not be reimbursed.

NOTE: All reimbursements are based upon submission of the proper expense documentation (invoices, receipts, etc.) Original itemized meal receipts must be submitted to the business office for reimbursement to be made. Credit card receipts will not be sufficient for reimbursement.

**V. INCIDENTAL EXPENSES**

Reimbursement for incidental expenses incurred as a result of authorized travel, such as toll road and bridge fees, vehicle parking fees, limousine service charges to and from airports, taxi fees, and the like, will be paid at the rate incurred, providing the voucher claim is supported with original receipt and the rate incurred is considered normal and customary. Credit card statements will not be sufficient for reimbursement.

**VI. REGISTRATION FEES**

Reimbursement for registration fees paid as a result of attendance at an authorized conference will only occur if a district purchase order is not accepted and pre-approval is obtained from the district’s purchasing agent. Reimbursement will be based upon actual expenses incurred, provided the Claim for Expenses Form is supported with appropriate receipts.

**VII. CAR RENTAL**

Reimbursement of rental car expenses will only be authorized if approval to rent a vehicle is granted in writing by the Superintendent of Schools or designee prior to the start of travel.

**VIII. CLAIM FOR EXPENSES FORM**

A Claim for Expenses Forms shall be utilized by all claimants submitting a claim for reimbursement under the provisions of this Policy. The district is exempt from Federal, State and municipal sales and excise taxes, and will not honor claims for reimbursement of funds expended for taxes unless the claimant can demonstrate that every effort to exempt payment was unsuccessful. The district will not reimburse New York State sales tax for accommodations, food or any others expenses under any circumstances. The Purchasing Agent will issue the attached “Tax Exempt Certificate” to individuals at their request prior to initiating authorized travel.

General Municipal Law Section 77 – b; 77 – c

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Revised: February 14, 2006, January 15, 2008A