



**CENTRAL OKANAGAN TEACHERS' ASSOCIATION**

**PROFESSIONAL DEVELOPMENT  
HANDBOOK  
2020 - 2021**



We acknowledge the efforts of many of our colleagues, locally and throughout the province, and COTA's office staff who have contributed to the development of this book.



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## **Important Dates to Remember for Professional Development**

**June 30<sup>th</sup>** – Last day for self-directed professional development forms to be handed in for the following school year.

**July 1<sup>st</sup> to June 30<sup>th</sup>** – are the dates that the three summer in-lieu professional development days have to be completed.

**July 15<sup>th</sup>** – Annual School Financial Report or a print out of the Professional Development Funds Report in SIMS (ask school head secretary for report) due to the COTA office and District Finance Department (Appendix B or the Pro-D Print Out in Sims).

**October 31<sup>st</sup>** – Last day to hand in the approved (must be voted on each year by teachers) school pro-d policy that includes school procedures for allocating school based pro-d funds, name of pro-d representative and treasurer.

Teachers have until October 31<sup>st</sup> to transfer their funds. If a teacher transfers after October 31<sup>st</sup>, they will have one month to submit their Pro-D Transfer Fund Form.

**Job Description of the Chairperson  
Professional Development Committee  
(COTA)**

Subject to the direction of the Executive Committee, the Representative Assembly and the general membership, the Chairperson of the COTA Professional Development Committee shall:

- direct the professional development activities of the Association;
- collect and set up contact information for school-based Professional Development Representatives, with assistance from the COTA Officer Manager;
- set up COTA and Conference Professional Development Committees, and arrange for meetings of said committees to be held, and arrange that a recording of the proceedings of these meetings be kept;
- plan programs for Professional Days and Conventions.
- maintain close liaison with local specialist associations and assist local specialist associations in organizing Professional Days and other local professional development activities;
- make allocations of professional development funds to school staffs and maintain records of said professional development funds;
- prepare as and when required a typed Professional Development Committee report for meetings of the Association;
- sit on any district committees related to professional development (Joint Pro D), as directed by the President and the Collective Agreement;
- maintain and update annually the locally developed Pro-D handbook;
- attend all Executive, Representative Assembly and General Meetings of the Association;
- prepare annually a typed report for the Annual General Meeting and Annual Newsletter;
- be responsible for the expenditure of funds allocated to the Professional Development program in accordance with the COTA constitution, policies and bylaws, and in cooperation with the COTA Treasurer.

## Collective Agreement Language

### **ARTICLE F.20      PROFESSIONAL IMPROVEMENT**

1.      The Employer and the Local shall maintain a District Professional Development Committee.  
  
The Committee shall be comprised of five (5) representatives each of the Local and of the Employer plus the Local's Professional Development chairperson, who will chair the Committee.
2.      The Employer and Union shall establish a fund for the purpose of promoting the professional development (excluding credit courses) of the teaching staff of the school district.
3.      The Employer shall place \$195.00 per full-time equivalent employee and the Union shall place \$35.00 per full-time equivalent employee into the Professional Development Fund.
  - a.      The Employer shall place an additional \$5,000 in this fund for the purpose of professional development for teachers teaching on call.
4.      The cost of teachers teaching on call for employees granted any professional development leave of absence shall be borne by the Professional Development Fund.
5.      The Professional Development Fund as established by the Employer and the Local shall be administered by the District Professional Development Committee.
6.      Each school staff shall elect a Professional Development Committee.
  - a.      The Committee shall be chaired by a teaching employee.
  - b.      The principal shall be an ex-officio member of the Committee.
7.      The terms of reference shall be established by the District Professional Development Committee and shall be in effect when approved by the Local and the Employer.
8.      The Professional Development fund will not be required to finance district "required" in-service or conferences.

# **COTA Professional Development Policies, Principles, and Procedures**

## **POLICIES**

### **1.0 Definition of Professional Development**

Professional development is a process of ongoing growth, through involvement in programs, services, and activities designed to enable teachers, both individually and collectively, to enhance professional practice.

### **2.0 Purposes of Professional Development**

The purpose of professional development is to assist teachers in improving the quality of our practices by:

- nurturing the development of professionals;
- enriching and maintaining professional relationships with students and parents;
- initiating curriculum and instructional reforms improving teaching and learning;
- discussing, assessing and applying educational theories;
- thoughtfully engaging in professional and collegial conversations.

## **PRINCIPLES**

### **3.0 Professional Development Principles**

3.1 Each teacher is responsible to the profession.

3.2 Our professional autonomy is essential and dependent on members responsibly using their Pro-D Days through ongoing, active learning.

3.3 Pro-D is driven by individual and/or collaborative reflection and assessment of needs.

3.4 Flexible and differentiated professional development opportunities are essential to meet the various learning needs of every teacher.

3.5 Pro-D encourages collegiality, informs teaching practice and enhances student learning.

3.6 Effective professional development requires commitment, resources, time and support to meet teachers' needs.

## **PROCEDURES**

### **4.1 Local Professional Development Procedures**

- 4.1.1 That where circumstances permit, members of the public should be invited and encouraged to attend professional development day activities.
- 4.1.2 For the purpose of the five professional development days, the dates run from July 1 to June 30 of the following year.
- 4.1.3 That COTA supports the province-wide PSA day as the October Pro-D day.
- 4.1.4 The COTA supports the Friday before Family Day in February; or as determined by the Zonal PD Chairs; to be a zone professional development day.
- 4.1.5 That teachers, as autonomous professionals, determine, with colleagues and/or the local union, the content of their professional development activities scheduled for professional development days, and further, that professional development days are not used for school goal setting and/or School Improvement Plans, marking, accountability, assessment tools, or voluntary activities (e.g. sports tournaments, science fairs, music festivals, drama productions). That where the employer directs that Professional Development days are to be held outside of the school year book ends (the first working day after Labour Day and the last working day in June), the COTA will support members in exercising their right to choose not to participate.
- 4.1.6 That COTA encourages teachers to fill in the self-directed professional development form on mycota.ca to create a log of professional development. Self-directed forms shall be completed by June 30 for the August Pro-D days, or as soon as possible in the new school year when teachers are assigned to a school after June 30<sup>th</sup>, and ten days prior to the October and February Pro-D days.
- 4.1.7 The COTA Pro-D Committee recognizes that Pro-D money is allotted to school Pro-D committees on a per individual FTE (Full-Time Equivalent) teacher basis. Funds are kept on a per teacher basis in a personal school based Pro-D account. It is the responsibility of a school Pro-D committee to disburse funds according to its policies. Allocation of District Pro-D money is set as of September 30<sup>th</sup>. There is no additional funding for teachers hired to new positions after this date. School Pro-D Committees will have to set their own policy for these circumstances.

### **4.2 School-based Professional Development Procedures**

- 4.2.1 Every school shall elect a Pro-D Committee (as per the Contract Article, F.20.6) to facilitate staff development.
- 4.2.2 The Pro-D Committee will elect a school Pro-D representative in September, for the school Professional Development Committee for the current school year.
- 4.2.3 The committee shall be familiar with the contents of the COTA Professional Development Handbook.
- 4.2.4 The committee will develop and review school procedures regarding the allocation of the school-based Pro-D funds and shall administer these funds in a fair and equitable manner.



The school procedures are to be presented and voted on by teachers, and then submitted to the COTA Pro-D Chairperson by October 31st.

- 4.2.5 The committee will complete the Annual School Financial Report on Individual Professional Development (Appendix B or the Pro-D Print Out in Sims). This report is to be submitted to the COTA Pro-D Chairperson and the School Board Finance Department by July 15th.
- 4.2.6 Additional duties of the school based Pro-D Representative
  - 4.2.6..1 To attend district meetings called regarding Professional Development
  - 4.2.6..2 To chair the school Professional Development Committee
  - 4.2.6..3 To distribute information received on Professional Development issues to the staff e.g. Pro-D Newsletter, etc.
  - 4.2.6..4 To inform teachers about upcoming professional development activities
  - 4.2.6..5 To construct a Professional Development Bulletin area in the staff room and to keep it current
  - 4.2.6..6 To give periodic reports to the staff regarding the status of the school professional development fund and any district issues regarding Professional Development
  - 4.2.6..7 To attend district training sessions for Professional Development Representatives
  - 4.2.6..8 To be responsible for maintaining a current Professional Development policy within the school – **policies should be forward to the COTA Professional Development Chair by October 31st.**
  - 4.2.6..9 To appoint a treasurer or assume the role of treasurer in dealing with school based Pro-D funds
- 4.2.7 When a teacher moves schools the funds in the teacher's personal Pro-D account will transfer with them to the new school's personal Pro-D account. The transferring teacher will fill out the Pro-D Transfer Fund form; the Pro-D rep from the last school will sign and write in the amount to be transferred.
  - 4.2.7..1 The teacher initiates the process.
  - 4.2.7..2 The pro-d rep at the school moved from would fill in the amount to be transferred and sign the form (keep a copy for your records).
  - 4.2.7..3 Then the teacher needs to get the signature from the principal.
  - 4.2.7..4 The form is given to the secretary at the old school who would write a cheque and send it to the new school.
  - 4.2.7..5 The teacher needs to give a copy of the completed form to the new secretary and pro-d rep at the new school as well.
  - 4.2.7..6 COTA Summer Institute fees will be charged to your school pro-d account at the new school if you moved to a new school after June 30<sup>th</sup>.
  - 4.2.7..7 Should your old school receive an invoice for you for the summer institute, they will forward it to your new school.
  - 4.2.7..8 Teachers have until October 31<sup>st</sup> to transfer their funds. If a teacher transfers after October 31<sup>st</sup>, they will have one month to submit their Pro-D Transfer Fund Form.

- 4.2.7..9 Please refer to Appendix A for a copy of the application for school professional development funds transfer form.
- 4.2.8 If a COTA member ceases to be a member of the COTA, their allocated Professional Development funds will transfer to the school Pro-D account of the school in which they last worked. The committee can set further policy on this if desired. All outstanding claims incurred prior to the termination of the member's contract must be submitted no later than 30 days from the contract termination date. If contract termination is June 30, members must complete their claim by September 15 of the same calendar year.
- 4.2.9 A teacher on a temporary contract is eligible to receive Pro-D funds from the assigned school, on a pro-rated basis. If a teacher is hired on a temporary contract commencing after September 30<sup>th</sup>, pro-rated funds may be accessed through the school Pro-D account. The committee may set further policy on this if desired. The teacher may access any accumulated Pro-d fund within 2 school months at the end of the contract if they do not receive a subsequent contract.
- 4.2.10 Individual teachers planning Pro-D where a TTOC is needed should contact their Pro-D representative for directions. The head secretary will arrange for a TTOC and the individual Pro-D account will be deducted the TTOC cost.

### 4.3. Professional Development Purchases

#### **Examples of what can and cannot be purchased from professional development funds:**

- 4.3.1 The following can be purchased from pro-d funds:
  - a. Professional books / e-books
  - b. Memberships to PSA, LSA and other professional organizations.
  - c. Conference registration and associated costs.
  - d. Courses (Cannot be courses claimed for income tax purposes)
- 4.3.2 The following can be purchased from pro-d funds with a rationale:
  - a. Travel and other expenses related to pro-d activities other than conferences.
- 4.3.3 The following cannot be purchased from pro-d funds:
  - a. Consumable curricular materials and resources
  - b. Admin directed in-service activities
  - c. Cell phone or data plans
  - d. Travel and accommodations related to holidays even if a pro-d activity is planned within.
  - e. Travel and accommodations related to student group activities. (eg. Sports tournaments, outdoor ed activities, club or class trips)

- f. Hardware, software, technology, and tools (items that the district needs to provide to enable a teacher to perform their job)

4.3.4.1 Should a member wish to dispute a decision on a professional development purchase they may appeal to the following:

- a. School pro-d committee
- b. COTA pro-d committee
- c. COTA pro-d chair

#### **4.4 TTOC Professional Development Fund**

- a. Summer Institute fees will come from this account
- b. Any dollars left over after the summer institute will be disbursed on a first come, first served basis utilizing the TTOC request for reimbursement application (Appendix F).

*November 19, 2014  
COTA General Meeting*

# Joint District Professional Development Committee

## Terms of Reference (12/2019)

### Mandate

The Joint District Professional Development Committee is a contractual committee (Article F. 20) made up of District Staff, principals/vice-principals of Central Okanagan Public Schools, and teachers of the Central Okanagan Teachers' Association. The committee will assist with supporting, coordinating, and communicating professional development and learning opportunities in the District. Therefore, the committee's mandate is to collaborate in the following:

- Endeavour to create awareness of the professional development and professional learning opportunities available throughout the district;
- Developing a coherent framework that details how the committee will work collaboratively together;
- Assisting, as needed, with the on-going growth of Local Specialists' Associations (LSAs) and teacher-driven initiatives;
- Encouraging local professionals to share their expertise within the district; and
- Enabling teachers to engage in ongoing and innovative activities that align with current educational research and best practice.

### Funding

As per Article F.20.2, the Employer and Union shall establish a fund for the purpose of promoting the professional development (excluding credit courses) of the teaching staff of the school district.

### Composition

As per Article F.20.1, the Committee shall be comprised of five (5) representatives each of the Local and of the Employer plus the Local's Professional Development chairperson, who will chair the Committee.

### Length of Term

Both the Employer and Local will determine the length of term for their own members.

Non-committee members shall be invited to participate/provide input when/if determined by committee need.

### Roles and Responsibilities

Committee members have the following responsibilities:

To attend meetings.

To ensure that professional development funds are allocated to individual teachers in an equitable manner.

To contribute suggestions on current activities that enhance educational practices.

## Committee Operations

### 1. Meetings

- Meetings will be coordinated and facilitated by the Local's Professional Development Chairperson.
- The committee will meet three (3) times per year – November, January, and April to discuss and coordinate upcoming professional development and professional learning initiatives and opportunities.
- Additional meetings can be held to address emerging issues as agreed upon by the committee.
- The minutes of regular committee meetings will be recorded and distributed to committee members.

### 2. Decision-Making

- The committee will endorse a consensus model to make decisions with the majority rule.
- Decisions made by the committee will be recorded in the committee meeting minutes.
- The respective parties will present the discussions/decisions of this committee to their respective groups.

### 3. Terms of Reference

- The committee will review/revise the Terms of Reference and the operational structure for the Joint Professional Development Committee on an annual basis.
- All changes to the Terms of Reference will be agreed upon by the committee.

An annual Terms of Reference for the current year shall be prepared by the Joint District Professional Development Committee and filed with the Central Okanagan Teachers' Association and the District Chief Financial Officer by October 31<sup>st</sup>, by the COTA Professional Development Chairperson.

# General Information for Professional Development Conferences and Self-Directed Professional Development Plans (PDP)

The COTA recognizes that teachers' Professional Development requirements are diverse and that individuals or small groups of teachers can use their time wisely to meet their own needs. Professional Development is a teacher directed initiative intended to improve the quality of education. It consists of a variety of activities which may include studying professional literature or materials, taking courses, participating in research, engaging in collegial group activities, and attending conferences. Professional Development is **not** marking, classroom setup, lesson planning, attending sporting events as a coach or a parent, or participating in personal endeavours.

## The Professional Development Lens

Teachers engaging in Professional Development should ensure their plan fits with the criteria listed in the Professional Development Lens.

### THE PROFESSIONAL DEVELOPMENT LENS

At the centre of the lens are teachers and their learning, both as a collective and as individuals. The term "teachers' professional development" is used to highlight its use both in thinking about individual PD and PD as a collective endeavor.

**The Inner Ring: Key criteria**

The inner ring consists of three factors that are necessary for an activity to be considered professional development. If any of the three are not present, then the activity should not be seen as professional development.

**The Outer Ring: Necessary factors**

The factors in the outer ring are critical to the success of teacher-directed professional development as a collective endeavor. In turn, this collective work provides the necessary conditions for all teachers to be able to create their own rich tapestries of appropriate professional learning.

**Diverse**  
Teacher-directed professional development opportunities should span a wide range of topics and learning methods.

**Collaborative**  
Teacher-directed professional development is best when teachers work together to plan, to deliver and to share their professional learning.

**Responsible**  
Does this activity meet obligations to colleagues, collective agreements, and our profession?

**Autonomous**  
Has this activity been voluntarily chosen? Does this activity jeopardize the autonomy of my colleagues?

**Career-long**  
Appropriate opportunities for teacher-directed professional development span the full range of a teacher's career.

**Funded and Supported**  
Teacher-directed professional development must be supported with time, information, respect, and encouragement. Adequate funds for both individual and collective teacher-directed professional development opportunities must be available.

### THE PROFESSIONAL DEVELOPMENT LENS

At the centre of the lens are teachers and their learning, both as a collective and as individuals. The term "teachers' professional development" is used to highlight its use both in thinking about individual PD and PD as a collective endeavor.

**The Inner Ring: Key criteria**

The inner ring consists of three factors that are necessary for an activity to be considered professional development. If any of the three are not present, then the activity should not be seen as professional development.

- a. Relevant**  
Does this activity help me improve the work I do in my role as a teacher?  
Does this activity help the teachers involved improve the work they do as a collective?
- b. Autonomous**  
Has this activity been/voluntarily chosen?  
Does this activity jeopardize the autonomy of my colleagues?
- c. Responsible**  
Does this activity meet obligations to colleagues, collective agreements, and our profession?

**The Outer Ring: Necessary factors**

The factors in the outer ring are critical to the success of teacher-directed professional development as a collective endeavor. In turn, this collective work provides the necessary conditions for all teachers to be able to create their own rich tapestries of appropriate professional learning.

- a. Funded and Supported**  
Teacher-directed professional development must be supported with time, information, respect, and encouragement. Adequate funds for both individual and collective teacher-directed professional development opportunities must be available.
- b. Career-long**  
Appropriate opportunities for teacher-directed professional development span the full range of a teacher's career.
- c. Diverse**  
Teacher-directed professional development opportunities should span a wide range of topics and learning methods.
- d. Collaborative**  
Teacher-directed professional development is best when teachers work together to plan, to deliver, and to share their professional learning.

BCTF PROFESSIONAL DEVELOPMENT

#ThisIsMyPD

## **General Guidelines:**

### **Number of Professional Development Days for which teachers are responsible.**

- All full-time teachers are responsible for fulfilling all five (5) Professional Development Days.
- Part-time teachers are responsible for fulfilling a pro-rated number of Professional Development Days.
- One Pro-d day of a self-directed activity or activities should be equivalent to an instructional day.
- Failure to indicate and undertake one of the above options may cost Special Circumstance Leave day(s) (ie. the cost of a TOC – see article G.30 in the Collective Agreement).

### **Payment for summer in-lieu Self-Directed Professional Development Days**

- To accommodate the two-week spring break, three pro-d days in the summer, as well as minutes added to the instructional day, make up the additional four or five days required for the second week of spring break.
- To receive pay for the in-lieu pro-d days a teacher needs to:
  - Be in a contract five days prior to spring break and through spring break, and;
  - Have completed three summer pro-d days or a self-directed PDP (SD-PDP)
- If a teacher has been on leave, the teacher who is working /at school the five days immediately prior to spring break will be the teacher paid full salary in March; and that one person per position gets paid for these days. Teachers who attend the three summer pro-d days or work on a self-directed PDP are ineligible if they are not working the immediate days prior to spring break.
- Teachers using individual sick days (either on the three August days and/or the March days immediately prior to spring break) shall be considered to still be at work in March (i.e. they are not on a specified collective agreement leave), and this teacher that worked the days prior to spring break is eligible for the days provided they have met the requirements of the SD-PDP/Summer days.
- Teachers who start a contract after spring break, or who have short term contracts during the year that do not extend to spring break, will not be paid for the three lieu days even if they have completed the summer pro-d or SD-PDP.
- Teachers who are on a leave should not be completing the August pro-d days nor should they be completing their SD-PDP while on leave. There is a concern around work, Worksafe, and a possible further injury if the district acknowledges that the work can be done while on a leave, in agreement for pay later.

## Guidelines for self-directed professional development:

- Teachers may elect to create a Self-Directed Professional Development Plan for the current or next school year. It is important to note that the summer days can be replaced with days in-lieu during non-instructional time throughout the school year (eg. time after school or on weekends).
- The October and February days are mandatory days of work. **In-lieu days are not an option for the October and February Professional Development Days.**
- For all self-directed Pro-D plans, the online Self-Directed Professional Development Planning Document (Appendix C) must be completed by the teacher and acknowledged by the school Principal.
- The Self-Directed Professional Development Plan shall be:
  - completed, and submitted to your Principal for acknowledgement for summer days in lieu by **June 30<sup>th</sup>**, or as soon as possible in the new school year when teachers are assigned to a school after **June 30<sup>th</sup>** **OR** completed 10 days prior to the October and February Professional Development Days **AND**;
  - completed on mycota.ca and emailed to Principal and school Pro-D Rep or filed at the school level and sent to the COTA Professional Development Chair.
- Changes to the Professional Development Plan Document may be made at any time through mutual agreement between the teacher and the principal. A Professional Development Plan cannot, however, be extended beyond June 30<sup>th</sup> of the applicable school year. Credit for completion of Professional Development Plan activities cannot be extended from one school year to another.
- Teachers currently on leave and teachers hired after the summer pro-d days will have the option to be considered for a Professional Development Plan beginning at a date mutually agreed to by the teacher and the principal.
- For a teacher who started a contract after the opportunity to complete the August pro-days, the final day for a SD-PDP to be submitted is the Friday before spring break. The exception would be if the contract is backdated to prior to spring break and the teacher will have an opportunity to submit a SD-PDP. The SP-PDP days must be completed by June 30<sup>th</sup>, or end of contract, whichever is earlier.
- Teachers who return to work, from a leave, after spring break are not eligible to do a PDP for that school year.



# Professional Development Funds

## Allocation of Professional Development Dollars

1. Contractually, the Employer shall place \$195.00 per FTE equivalent employee and the Union shall place \$35.00 per FTE equivalent employee into the Professional Development Fund.
2. As per a membership vote at a COTA General Meeting, \$20.00 of the \$195.00 per FTE will be assigned to the COTA Summer Institute.
3. The Union's contribution of \$35.00 per FTE is collected through the monthly COTA Union fees and placed in the COTA Professional Development Account.

## Teachers Teaching on Call Professional Development Dollars

1. The Central Okanagan Teachers' Association (COTA) shall administer the allocated teacher on call professional development funds.
2. By September 15th, 100% of the funds allocated for teacher on call professional development shall be forwarded to the COTA Office by School District #23.
3. The teacher on call account shall have two (2) signing officers, as determined by the COTA Constitution.
4. The COTA Pro-D chairperson shall authorize the TOC request forms (Appendix F).

### **TTOC MONIES**

1. Max. \$175 – available on a first come, first serve basis.

### **Examples of what can and cannot be purchased from professional development funds:**

The following can be purchased from pro-d funds:

- a. Professional books / e-books
- b. Memberships to PSA, LSA and other professional organizations.
- c. Conference registration and associated costs.
- d. Courses (Cannot be courses claimed for income tax purposes)

The following can be purchased from pro-d funds with a rationale:

- a. Travel and other expenses related to pro-d activities other than conferences.

The following cannot be purchased from pro-d funds:

- a. Consumable curricular materials and resources
- b. Admin directed in-service activities
- c. Cell phone or data plans
- d. Travel and accommodations related to holidays even if a pro-d activity is planned within.
- e. Travel and accommodations related to student group activities. (eg. Sports tournaments, outdoor ed activities, club or class trips)
- f. Hardware, software, technology, and tools (items that the district needs to provide to enable a teacher to perform their job).

Should a member wish to dispute a decision on a professional development purchase they may appeal to the following:

- a. School pro-d committee
- b. COTA pro-d committee
- c. COTA pro-d chair

## **Organizing, Approval and the Distribution of School Pro-d Funds**

1. A school-based Professional Development Committee elected by teaching staff shall assist the staff in setting school and individual professional development goals. The committee will administer the allocated funds for individual teachers and school-based activities.
2. The Administrative Officer shall be an ex-officio member of the Committee.

### **INDIVIDUALIZED SCHOOL-BASED PROFESSIONAL DEVELOPMENT ALLOCATIONS**

1. By October 31, **\$175** of the funds allocated for professional development, based on September 30 F.T.E. teachers, and shall be transferred to the school.
2. There is no one way to distribute the funds. Each school should establish their own Guidelines and use their own discretion when designing their funding distribution.
3. Two school designated signing officers shall issue cheques against this account, one of which shall be the Administrative Officer.
4. The Professional Development Committee shall not incur a deficit.
5. Surplus amounts in the individualized school-based Professional Development Fund shall be retained by the school at the end of the school year and carried forward on the Pro-d Reconciliation Form for the subsequent year.
6. An annual school report on Professional Development shall be filed with the School District Office (c/o Director of Finance) and the Central Okanagan Teachers' Association Professional Development Committee Chairperson by July 15th using Form Pro-d Reconciliation.xls.

## Local and Provincial Specialist Associations

### Local Specialist Association (LSA) and Provincial Specialist Association (PSA)

The COTA encourages and supports Local Specialist Associations (LSAs). As an integral part of the Association, the LSAs operate in accordance with BCTF policies and procedures and their PSAs and own constitutions.

All COTA members are encouraged to become members of one or more LSA(s) to share expertise and to gain information and experience.

Each year, the COTA provides a complimentary PSA membership to each new member at the induction ceremony in the member's local.

Each LSA is unique—its strength determined by its members and its executive. LSAs promote communication among members through journals, newsletters, conferences, workshops, websites, e-mail lists, and other activities.

Individual LSAs are represented on the LSA Committee through their presidents. The LSA Committee provides advice to the COTA Executive Committee on matters of concern to LSAs and on working and learning conditions, curriculum, professional development, and educational leadership.

### Provincial Specialist Associations

#### Overview

The BCTF encourages and supports over 30 Provincial Specialist Associations (PSAs). As an integral part of the Federation, the PSAs operate in accordance with BCTF policies and procedures and their own constitutions.

All BCTF members are encouraged to become members of one or more PSAs to share expertise and to gain information and experience.

Each PSA is unique—its strength determined by its members and its executive. PSAs promote communication among members through journals, newsletters, conferences, workshops, websites, email lists, and other activities.

Individual PSAs are represented on the PSA Council through their presidents. The PSA Council provides advice to the BCTF Executive Committee on matters of concern to PSAs and on working and learning conditions, curriculum, professional development, and educational leadership.

Visit the PSA website at <https://www.bctf.ca/psas.aspx>

Updated June 2020

## BCTF/COTA/SD23 Teacher Inquiry

Are you craving time to reflect on your teaching and to have the opportunity to participate in powerful and relevant conversations about teaching and student learning with your colleagues? Would you like to spend time on important teaching questions that are important to your daily work? This Professional Learning Option might be just right for you!

### About the Teacher Inquiry Pro-D Project

Participants in the Teacher Inquiry Pro-D will have the opportunity to define and refine their own inquiry questions on the topics of interest to their group - an inquiry driven learning community. Some examples might include: Indigenizing the Curriculum, Reconciliation, Project-Based Learning, integrating technology and activities, mindful pedagogy, critical thinking, visible learning, ESL, literacy and numeracy, standards-based grading, competencies, self-regulation, differentiation, assessment, Innovative Learning, Heritage Fairs, new curriculum, Visible Learning, etc.... Teachers will then proceed to investigate their questions through case study, appreciative inquiry, collaborative teams, book study, and/or action research.

The first meeting is scheduled in October for a half day. The rest of the follow-up meeting times and locations will be arranged by your group. There will be a final celebration after school at the end of May. Three full time days are allocated for each member.

### Rationale for the Project:

Research indicates that excellence in professional development occurs when it is linked to the daily practice of teachers and occurs over-time through inquiry and focused conversations with fellow teaching professionals.

**Please e-mail your proposals to Daphne Meier (daphne.meier@sd23.bc.ca), by October 15<sup>th</sup> each year.** Participants will be notified by the end of October if accepted.

One proposal per group. Please include the following:

- 1) Names of Participants.
- 2) School, grade level, and subject area.
- 3) Number of years of teaching experience.
- 4) How much experience do they have in teacher inquiry?
- 5) Preferred inquiry approach - **case study, action research, appreciative inquiry, collaborative teams, or a book study.**
- 6) Starting question that your group would like to research. Note that this question gets refined as the process unfolds.
- 7) How will your group develop an inquiry driven learning community?
- 8) What does your group hope to achieve through this inquiry?

- 9) Part of this proposal is to share your findings with others at a celebration at the end of May. Indicate how your group might record their journey through this process.

We receive more applications than we have spots. Preference will be given to:

- applications that describe how they will develop an inquiry driven learning community
- proposal are complete and describe what they hope to achieve through their inquiry
- small school groups (4 or 5) who would like to collaborate on an inquiry project
- new teachers (within five years) collaborating with experienced teachers



## APPLICATION FOR SCHOOL PROFESSIONAL DEVELOPMENT FUNDS TRANSFER

**Teacher and Pro-d Rep to complete:**

DATE: \_\_\_\_\_

Name of teacher transferring funds: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No: \_\_\_\_\_

Transfer funds from: \_\_\_\_\_

School

Amount to Transfer: \_\_\_\_\_

**(Pro-d rep to fill in)**

Transfer funds to: \_\_\_\_\_

New School

\_\_\_\_\_  
**Signature of School Pro-d Rep**

\_\_\_\_\_  
**Signature of Administrator**

\*\*\*\*\*

\*

**Office Use Only**

Cheque issued: \_\_\_\_\_ (date) amount: \_\_\_\_\_

**Please send a copy of application with cheque to New School Secretary and Pro-d Rep.**

Teachers have until October 31st to transfer their funds. If a teacher transfers after October 31<sup>st</sup>, they will have one month to submit it.



## **SELF-DIRECTED PROFESSIONAL DEVELOPMENT PLAN (PDP): Planning Document**

### **Purpose of the Self-Directed Professional Development Plan (PDP): Planning Document:**

- This form recognizes the teacher's request for an optional activity on a professional development day. This form provides information to the COTA Professional Development Chair, the School Principal and your professional development representative regarding your fulfillment of the Professional Development Day requirements. Please check the appropriate box.

**Please note a separate form MUST be completed for each of the three options, if applicable.**

**Summer Days (in-lieu time permitted)**

**October Self-Directed Activity (NO IN-LIEU DAYS PERMITTED)**

**February Self-Directed Activity (NO IN-LIEU DAYS PERMITTED)**

### **A. IDENTIFYING INFORMATION**

**Name:**            **School:**

### **B. TOPIC(S) (Area of interest)**

**C. ACTIVITIES - (e.g. studying professional literature or materials, taking courses, participating in research, engaging in collegial group activities, attending conferences, etc.)**

Title of Activity	Date (in lieu of summer PD days only)



D. Please complete either Part 1 or 2

**Part 1)** Completion of Summer PDP - requires signature of Teacher, School PD Rep, and Principal before June 30<sup>th</sup>

**Teacher:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**PD Rep:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Principal:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Copies to:         Teacher     Principal     COTA PD Chair     School PD Rep

**OR**

**Part 2)** October or February Dates – must be completed 10 days prior to PD day

Copies to:         Teacher     Principal     COTA PD Chair     School PD Rep

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Self-Directed Professional Development Plan (PDP): Planning Document – Revised November 20, 2012

## Appendix D

### Local Specialist Association

If you are interested in joining an LSA, please contact the COTA office.

	<b>LSA name</b>
1.	<b>Alternate Education LSA</b>
2.	<b>Central Okanagan Dance Association</b>
3.	<b>COESCA</b> (Central Okanagan Elem. School Counselors Assoc.)
4.	<b>COSC</b> Sec. Counselors
5.	<b>COLATA</b> Learning Assistance
6.	<b>COME A</b> Music Elem.
7.	<b>COME A</b> Music Middle/Sec.
8.	<b>COPTA</b> Central Okanagan Primary Teachers' Association
9.	<b>COSSTA</b> - Central Okanagan Social Studies Teachers' Association
10.	<b>COTLA</b> Librarians
11.	<b>French as a Second Language</b>
12.	<b>Indigenous Education</b>
13.	<b>Kelowna Home Economics LSA</b>
14.	<b>KIDS</b> <b>Kelowna Instructors of Drama in School</b>
15.	<b>Mathematics LSA</b>
16.	<b>Science LSA</b>
17.	<b>Social Justice LSA</b>
18.	<b>TEK LSA – Middle</b> Technology Educators of Kelowna
19.	<b>TEK LSA – Secondary</b> Technology Educators of Kelowna
20.	<b>Visual Arts LSA</b>



# LSA Handbook

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## LSA Important Dates - Checklist

September	<ul style="list-style-type: none"> <li>• Ensure LSA executive is in place</li> <li>• Update constitution</li> <li>• Initiate planning</li> <li>• Ensure banking (2 signing authorities) is in order</li> <li>• Watch myCOTA.ca for the application deadline for the October Professional Development day</li> <li>• Note - All new LSAs require a letter from the COTA office to set up a bank account.</li> </ul>
October	<ul style="list-style-type: none"> <li>• LSA Presidents' Committee meeting</li> <li>• <b>Ensure that COTA has a copy of the LSA's constitution and banking information</b></li> <li>• Complete and submit grant application</li> </ul> <p><b><i>Deadline for all documentation is October 30<sup>th</sup>.</i></b></p> <p>Please note: Late applications will not be accepted. Although the LSA will not be delisted, funds will not be received for the year.</p> <ul style="list-style-type: none"> <li>• Attend PSA or LSA Pro D activity</li> </ul>
Late November/early December	<ul style="list-style-type: none"> <li>• Watch MyCOTA.ca for the application deadline for the February Professional Development day</li> </ul>
February	<ul style="list-style-type: none"> <li>• Attend LSA Pro D activity</li> </ul>
April	<ul style="list-style-type: none"> <li>• LSA Presidents' Committee meeting</li> </ul>
June	<ul style="list-style-type: none"> <li>• Year End Activity Report – submitted to COTA</li> <li>• Financial Reporting Form – submitted to COTA and District Accounts Payable</li> </ul> <p><b><i>Deadline for documentation is July 15<sup>th</sup></i></b></p> <p>Note: All forms were updated in the 2019/2020 school year. Please use the current forms.</p>

## **LSA Policies and Procedures**

The COTA encourages and supports Local Specialist Associations (LSAs). As an integral part of the Association, the LSAs operate in accordance with BCTF policies and procedures and their PSAs and own constitutions. All COTA members are encouraged to become members of one or more LSA(s) to share expertise and to gain information and experience.

Each year, the COTA provides a complimentary PSA membership to each new member at the induction ceremony in the member's local.

Each LSA is unique—its strength determined by its members and its executive. LSAs promote communication among members through journals, newsletters, conferences, workshops, websites, e-mail lists, and other activities.

Individual LSAs are represented on the LSA Committee through their presidents. The LSA Committee provides advice to the COTA Executive Committee on matters of concern to LSAs and on working and learning conditions, curriculum, professional development, and educational leadership.

### **Purpose of a LSA**

It shall be the right of each LSA to foster professional development through activities which may include:

1. Channels for members to exchange ideas on research, teaching strategies, curriculum development, and other shared interests.
2. Maintaining liaison with post-secondary faculty members in the specialist area.
3. Maintaining a system of group communication with its members through journals, newsletters, on-line communications/e-mails and the holding of general meetings.
4. Participate with the corresponding PSA through activities such as: conferences, membership, and leadership roles in the PSA.
5. Present sessions at the February Zonal Professional Development Conference.
6. Liaise with the COTA Professional Development Chairperson with matters pertaining to professional development.
7. Any other activity needs to be authorized by the COTA Executive Committee.

### **Representation**

No LSA shall make representations to any authority or agency outside of COTA without authorization from the COTA office.

### **Finance**

The financing of LSAs shall be provided through:

1. an LSA membership fee (optional) Note: If your LSA charges a membership fee, it must be reported on the financial reporting form at year end.
2. a \$500 grant from COTA.
3. any LSA in its second and subsequent years may be eligible for a portion of a school district grant that the COTA administers. Deadline for the grant submission is October 30<sup>th</sup>.
4. Income needs to be used, accounts in excess of \$500 will be required to provide a complete explanation of intentions for accumulated funds.

Note: LSAs are not intended to generate and accumulate monies.

### LSA Bank Accounts

1. The use of an LSA bank account shall be restricted to depositing revenues and paying approved expenses.
2. The Executive of any LSA shall designate two (one of whom shall be the Treasurer) members of the LSA as co-signing officers of such a bank account.
3. The co-signing officers of the LSA shall provide the LSA a full financial accounting of the revenues and expenditures of the LSA at a LSA General Meeting.
4. The President or designate of the LSA shall provide the COTA with a copy of the financial accounting at the end of each school year by July 15<sup>th</sup>.
5. When a new LSA opens a bank account, it will require a letter of introduction from COTA to the financial institution.

### LSA Membership

1. Individual membership in an LSA will be on a 12-month basis commencing in September.
2. All members of an LSA shall be BCTF members.

### LSA Organization

1. All LSA constitutions and any changes that may be made to them are to be submitted to the COTA Professional Development Chairperson.
2. It is the responsibility of each individual LSA to:
  - a) maintain regular, on-going communication with its members.
  - b) encourage members of the LSA to renew their memberships.
3. Initial recognition of an LSA will be given to a group of members when:
  - a) It has established purposes as outlined in the Purpose of an LSA section.
  - b) It has established a program: objectives, activities, related to the objectives and evaluation criteria.
  - c) It has held a general meeting to approve a constitution, to elect officers, to establish a membership fee (if applicable) and to discuss goals and activities.
  - d) It has reviewed the COTA policies and procedures on LSAs will use them as guidelines.
  - e) It has a minimum membership of five, including an executive committee consisting of, at least, a President, a Treasurer and a Secretary.
  - f) Existing LSAs have made a concerted effort to accommodate a new group, and the new group has made a concerted effort to have its needs met within an existing LSA.
  - g) The LSA Committee has made a recommendation to the COTA Executive Committee that an LSA be established.
  - h) The LSA will align itself with a PSA and encourage membership to that PSA. ***At least one of the LSA EC members should belong to the PSA with which the chapter is affiliated.*** All LSA members will be encouraged to join a PSA.
4. The Professional Development Chairperson will present a list of active LSAs annually to the COTA EC after:
  - a) ensuring that the required paperwork has been completed.
  - b) confirming that the President or designate has attended two meetings per year.

- c) organizing professional development for the October/February Pro D day in consultation with the COTA Professional Development Chairperson.
- d) the LSAs have provided COTA with a schedule of meetings held for the year (on year end activity report).

5. Delisting of an LSA with the COTA will follow these procedures:

- a) An LSA seeking delisting in the COTA will:
  - ensure that members, by a ballot or AGM, have agreed to delist.
  - Communicate with COTA Pro-D Chairperson that the delisting of the LSA proceed.
- b) COTA Pro-D Chairperson will inform the COTA Executive Committee of decision by the LSA to delist and recommend that the EC remove recognition.
- c) Any remaining funds in the LSA bank account shall be forwarded to COTA.
- d) The funds will be held-over for one year. In the event that the LSA is not relisted within that year, the funds will be evenly distributed to active LSAs in the second year.

**COTA LSA Committee**


- 1. The LSA Committee shall be composed of the President of each LSA.
- 2. The LSA Presidents are responsible for attending committee meetings and representing the concerns of their respective LSAs.



**Local Specialist Association/ PSA Affiliates (Existing LSAs)**

	<b>LSA name</b>
1.	<b>Alternate Education LSA</b>
2.	<b>Central Okanagan Dance Association</b>
3.	<b>COESCA</b> (Central Okanagan Elem. School Counselors Assoc.)
4.	<b>COSC Sec. Counselors</b>
5.	<b>COLATA Learning Assistance</b>
6.	<b>COMEIA Music Elem.</b>
7.	<b>COMEIA Music Middle/Sec.</b>
8.	<b>COPTA Central Okanagan Primary Teachers' Association</b>
9.	<b>COSSTA - Central Okanagan Social Studies Teachers' Association</b>
10.	<b>COTLA Librarians</b>
11.	<b>English – Inactive – remove 2020</b>
12.	<b>French as a Second Language</b>
13.	<b>Indigenous Education</b>
14.	<b>Kelowna Home Economics LSA</b>
15.	<b>KIDS</b> <b>Kelowna Instructors of Drama in School</b>
16.	<b>Mathematics LSA</b>
17.	<b>Science LSA</b>
18.	<b>Social Justice LSA</b>
19.	<b>TEK LSA – Middle</b> Technology Educators of Kelowna
20.	<b>TEK LSA – Secondary</b> Technology Educators of Kelowna
21.	<b>Visual Arts LSA</b>

## What are PSAs?

The BCTF includes 32 [provincial specialist associations](#) (PSAs) . PSAs are channels for members to exchange ideas on research, teaching strategies, curriculum development, and other shared interests.

Contact [PSA Council members](#) by e-mail to ask about their PSA.

## What do PSAs do?

- **PSA conferences**  
Each year, scores of volunteers organize provincial and regional conferences for colleagues. The PSA conferences are highlighted on the BCTF's [PD Calendar](#) as well as in the [PSA conference brochure](#).
- **PSA workshops**  
Many PSAs offer workshops for schools or districts, often at cost. Please contact PSAs directly for more information on the workshops that they offer.
- **PSA publications**  
Volunteers, who are teachers themselves, produce newsletters and/or journals. BCTF members may join any of the Federation's PSAs. Subscriptions to PSA publications are available to non-BCTF members or institutions.
- **E-mail lists**  
Subscribe to any of the PSA [e-mail lists](#). Some lists are open to all members.

## How does one join a PSA?

Join a PSA to share your expertise and obtain information.

**Online membership registration is available.** [Click here](#) to join or renew PSA memberships now.

Alternately, download and print the [PSA application form](#) , and mail it to the BCTF with the appropriate fees.

For information concerning PSA applications, contact [PSA-coordinator@bctf.ca](mailto:PSA-coordinator@bctf.ca), 604-871-1802 or 1-800-663-9163 local 1802.

## Forming a Local Specialist Association

An LSA affords opportunity for teachers to discuss local problems and to exchange ideas. A group of enthusiastic teachers can invite speakers to locally sponsored workshops and can work through the local teachers' union on local conditions that need improvement.

### Organization of an LSA

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1. Any interested group may form an LSA. As soon as members have made a decision to organize, they should inform the local PD chairperson and the provincial specialist association's president.
2. At least one LSA EC member must belong to the PSA with which the chapter is affiliated.
3. An LSA has certain responsibilities to its local union. It should keep the executive informed of its plans and projects and shall go through the local union in any business with the school board or superintendent.
4. The executive of an LSA is elected from the membership at a general meeting of members held annually [usually in the late spring for the following term]. All members of the LSA executive should be PSA members and active BCTF members.
5. Finances for the chapter:
  - 5.1. A fee may be charged to members of an LSA.
  - 5.2. A registration fee may be charged for workshops; often a collection is taken to offset the cost of refreshments.
  - 5.3. COTA provides a grant of \$500 to all active LSAs. An application must be submitted to COTA by October 30<sup>th</sup> of each new school year. This application in the second and subsequent years will qualify the LSA for the school district grant as well.
  - 5.4. The provincial specialist association may offer grants to its chapter on behalf of members who are PSA members and BCTF members. The BCTF will provide lists of such members at any time on request.
6. Attendance at meetings: An LSA may invite any people it wishes to attend its meetings, but only members of the teachers' union local and the PSA may vote and/or hold office.
7. Notices of meetings should go to all members. Duplicated minutes or reports of meetings shall be sent to the members. It helps everyone to keep in touch with the group, especially if it is not convenient for all the members to attend every meeting. It is important that material sent out by an LSA be carefully prepared, neat, and accurate.
8. The executive will assume the responsibility of organizing activities, but the members should be informed of its plans and decisions. The membership is free to question or to offer suggestions at any time.
9. Each LSA determines the offices needed. Suggested: president, vice- president, secretary, and treasurer.
10. Meeting dates should be set well in advance and should be well publicized. Choose times and places that are convenient for the majority.
11. It is better to have a few good meetings than many poor ones.

## Organization of a LSA

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12. Each LSA of a provincial specialist association is expected to:
  - 12.1. Maintain a legislative organization and ratify a constitution.
  - 12.2. Ensure that as many local members as possible join the PSA.
  - 12.3. Study the PSA's constitution and literature.
  - 12.4. Promote professionalism as interpreted by the PSA.
  - 12.5. Communicate and co-operate with the parent provincial specialist association.
  - 12.6. Direct appropriate action through the PSA executive.
  - 12.7. Direct appropriate action through the local teachers' union [PD chairperson].
  - 12.8. Keep information flowing.
  - 12.9. Complete necessary paperwork.

## Constitution Template

The name of this association shall be the (add LSA name) Choose an item. , subsection of the (click here to enter PSA name)Local 23 Choose an item. and member of the COTA.

### OBJECTIVES

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The objectives of this association shall be:

1. To promote and advance education throughout the province.
2. To act as a clearinghouse for ideas and a source of trends and new developments.
3. To furnish recommendations and advice to the teachers' union local and to the P.S.A. on matters affecting education and teachers.

### BASE OF OPERATION

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The operations of the association are to be carried on in School District No. 23

### BY-LAWS

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#### ARTICLE 1—MEMBERSHIP

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Membership shall be open to any person who is a member of the local teachers' union. The membership year shall run from September to September of the following year.

#### ARTICLE 2—FEES AND FINANCIAL RECORDS

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- a. Membership fees shall be established by resolution at each annual general meeting of the association.
- b. The financial records of the association shall be maintained by the treasurer and shall be open to the membership and to the executive of the parent provincial specialist association.

#### ARTICLE 3—OFFICERS

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The officers shall be at least a President, a Treasurer and a Secretary. Officers shall be elected for a term of one year at the annual general meeting.

#### ARTICLE 4—COMMITTEES

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- a. The executive committee shall be the officers of the association and selected committee chairpersons.
- b. Committees may be appointed by the executive committee from among the members of the association. Such committees shall be responsible to the executive committee.
- c. Wherever a vacancy occurs in the executive committee through any cause, the executive committee shall name a member to fill the vacancy until the next general meeting.

#### ARTICLE 5—DUTIES

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- a. The duties of officers and of the executive shall be as defined in Robert's Rules of Order when not in conflict with any clause of this constitution, and they shall also govern the procedure of all meetings.
- b. At the first section of the annual general meeting, the secretary shall report in detail the business of the association during the year, and the treasurer shall submit in writing a report of the financial condition of the association, including a detailed statement of all receipts and expenditures.

## ARTICLE 6—MEETINGS

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- a. The annual general meeting of the association shall be held each year at a time and place to be designated by the executive committee.
- b. Other general meetings of the association shall be held from time to time as ordered by the executive.

## ARTICLE 7—REPRESENTATIONS TO OUTSIDE AGENCIES

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Any representations made by the L.S.A. to an authority outside the local teachers' union (on a local issue to the school board) or P.S.A. (on a provincial matter to the Ministry of Education) should be conducted through the **Central Okanagan Teachers' Association** or the Choose an item: **"[click here to enter name of PSA]"**.

### Duties of officers

Each L.S.A. will consider its needs and allocate duties to meet its requirements. The president of a P.S.A. is an ex officio member of each L.S.A..

#### President

1. Chair general and executive meetings.
2. Call meetings of the executive and of the membership [the dates and locations to be arranged for the convenience of those concerned].
3. Arrange the agenda for meetings of the executive and of the general membership. The secretary may be called on to prepare printed copies for use at the meeting. The agenda should be prepared well in advance of a meeting to allow for adequate pre-contacts with all persons involved in the business of that meeting.
4. Arrange for an annual general meeting and election of officers for the coming year.
5. Appoint special committees as necessary and be ex officio member of each committee.
6. Carry out plans set by previous committees.
7. Act as official representative to outside groups [or name a substitute— secretary] report to the membership, commitments or activities that involve the L.S.A..
8. Maintain knowledge of L.S.A.'s finances.
9. Assist the secretary in preparing the annual report of the L.S.A.'s activities, a copy of which is sent to the teachers' union local and to the provincial specialist association. A president both represents and leads.

#### Vice-President

In some L.S.A.s, holding this position is training for the following year's president. The vice-president, therefore, should make every effort to learn the routines and background of the association, which is best done by actively participating.

1. Attend all meetings of the executive committee and general meetings.
2. Be an active member of L.S.A. committees.
3. Be ready to chair meetings or act as the president's substitute at any time.
4. Keep on file copies of reports and records for ready reference.
5. Get to know many L.S.A. members personally.

### Past-President

1. Attend all executive and general meetings.
2. Assist the president if requested.
3. Be ready and willing to assume any task in an emergency.
4. At the request of the president, act as nominations chairperson for the next election of officers.

### Secretary

This might be divided into two offices: recording and corresponding.

1. Take minutes at every executive meeting and general meeting.
2. Be prepared to read the minutes at the following meeting of each group.
3. Duplicate the minutes and send them to the members, the local teachers' union, and the P.S.A..
4. The president needs a copy of the minutes immediately after a meeting to act on decisions recorded therein and to check for accuracy.
5. As directed by the president, send notices of meetings to all people concerned.
6. Promptly acknowledge correspondence received by the L.S.A..
7. Provide the local teachers' union's PD chairperson and the P.S.A.'s president a duplicated list of names and addresses of the officers of the L.S.A..
8. Arrange for the purchase and distribution of L.S.A. stationery.
9. Submit vouchers to the treasurer for all expenses related to secretarial duties. A professional tone in all communication is vital to good public relations for the L.S.A..

### Treasurer

1. Keep an accurate record of all money belonging to the L.S.A..
2. Be prepared to give the balance on hand and a statement of receipts and disbursements at each general and executive meeting of the L.S.A..
3. Present an annual budget to the executive committee at the first meeting in the fall and request its adoption [the budget figures may have been prepared in the spring to request an allowance from the parent associations].
4. Be responsible for all routines in collecting and banking the L.S.A.'s money.
5. Issue cheques for payment of L.S.A.'s expenditures [usually there are two signing officers].
6. Attend to reimbursements promptly where guest speakers are concerned, have the cheques ready ahead of time.
7. At the end of the year, present a written statement of receipts and expenditures to the membership and to the P.S.A. treasurer

### LSA Grant Process

- COTA will administer both the \$500 COTA grant and the Central Okanagan Public Schools Grant.
- Currently, the school district provides a total LSA grant of \$25,000 to be distributed to active LSAs. (Please note that COTA must apply for this grant and there is no guarantee that this level of funding will continue.) Cheques are usually sent out in early November but grant applications **must be completed by October 30th**. Grant applications are to be submitted to Daphne Meier at [Daphne.Meier@sd23.bc.ca](mailto:Daphne.Meier@sd23.bc.ca), COTA Office Manager.
- LSAs are required to submit a grant application (attached).
- Cheques will be sent to the LSA Treasurer – please **deposit this cheque ASAP** to avoid bookkeeping nightmares and the need to re-issue stale-dated cheques.

- LSAs must submit a financial statement **by July 15th** to COTA and to Accounts Payable [accountspayable@sd23.bc.ca](mailto:accountspayable@sd23.bc.ca) by July 15<sup>th</sup>.
- Banking information must be provided to the COTA office. You must have two signing officers on your account (i.e. President & Treasurer).

### **What can the grant funds be used for?**

Grant funds can be used for bringing in speakers for your membership, providing food at regular LSA meetings, and/or sending delegates to conferences to come back and present at a Pro-d day or LSA meeting and PSA memberships.

## **Bank Accounts/Finance**

### LSA Bank Accounts

1. The use of an LSA bank account shall be restricted to depositing revenues and paying approved expenses.
2. There shall be a minimum of two signing officers. One shall be the President and the other the Treasurer.
3. An LSA should give their bank or credit union the COTA's address for all return mail.

### Finance

- A. The financing of LSAs shall be through:
  1. A LSA membership fee. (optional) If your LSA charges a membership fee, it must be reported on the financial reporting form at year end.
  2. A COTA grant. \$500 per LSA/year.
  3. Any LSA in its second and subsequent years may be eligible for a portion of a school district grant that the COTA administers. Deadline for the grant submission is October 30<sup>th</sup>.
  4. LSAs are ineligible in their first year for the district grant.
  5. The funds returned to the COTA from a delisted LSA will remain with COTA for one year following the delisting. If the LSA is recognized the following year, the funds revert back to the LSA. The one year waiting period for the district grant is in place. If the LSA stays delisted after a year, the funds returned to COTA and will be divided equally among all LSAs for that said year.

## **Planning a Conference**

**Note: LSAs must coordinate professional development activities with the COTA Pro D Chairperson.**

### **Responsibilities of the LSAs**

1. **Financial:** Each LSA will pay for its own speakers (honorariums, travel, accommodation, meals). Financial support may be available from COTA depending on the costs and the number of teachers than can be accommodated. In order to receive funding from COTA, LSAs must meet deadlines established by the Professional Development Chairperson. This includes the "call for presenters" deadline as forms must be completed and submitted by the due date. There is very little discretionary funding, so try to be frugal while trying to attain a high standard of workshop and/or presentation.



2. **Facilitation of the workshop(s)**: Each LSA is responsible for finding the speaker(s), making all arrangements with/for them, and looking after them on the day of the conference.
3. **Timeline**: All speaker information (as above) and session blurb must be entered into mycota.ca by the deadlines indicated (watch MyCOTA.ca for the deadline dates). Timeline pressures become extreme at the COTA office, too, and we can't do anything regarding venues, brochure and supplementary activities until your information has been received.

Local Specialist Association: Grant Request Form

(Submit to the C.O.T.A. Pro-D Chairperson and the C.O.T.A. Office Manager no later than October 30th of any school year)

If completing this form on-line, please enter your information in the blank lines. The line will adjust to accommodate your entry. Once completed, please email to the Pro-D Chairperson Joe.Jamison@sd23.bc.ca and COTA Office Manager, Daphne.Meier@sd23.bc.ca

Name of L.S.A. Choose an item. Year Choose an item.

President School Choose an item.

Treasurer School Choose an item.

Please list names of other EC members:

Which PSA are you affiliated with? Choose an item.

How are you affiliated? (i.e. are you members of the PSA, on the PSA Executive, etc.)

LSA goals for the current school year:

- 1.
2.
3.

Our LSA is declining the grant for this school year Choose an item.

President's Signature:
Revised September 2019

# L.S.A. Year End Activity Report

Revised: June 2019

**Name of L.S.A.** Choose an item. **School Year** Choose an item.

**President:** **School:** Choose an item.

**Treasurer:** **School:** Choose an item.

1. Summarize the L.S.A.'s accomplishments for the past school year.

2. Number of members this past school year?

3. How much was the LSA membership fee?

4. If you have over \$500 in your account, please explain. Is the LSA saving for a conference, to bring in a speaker, etc?

5. Please provide the names of your LSA Executive Committee for the upcoming school year.

**President:** **School:** Choose an item.

Updated June 2020

**Treasurer:**        **School:** Choose an item.

**Other members:**

Please email this completed form to [Daphne.Meier@sd23.bc.ca](mailto:Daphne.Meier@sd23.bc.ca).

Reminder: Please prepare a **financial report** (reconciliation) for the past school year (using the LSA Financial Reporting Form (Excel) provided) and email to the COTA Office Manager, [Daphne.Meier@sd23.bc.ca](mailto:Daphne.Meier@sd23.bc.ca) and SD #23 Accounts Payable, [accountspayable@sd23.bc.ca](mailto:accountspayable@sd23.bc.ca)

**The DEADLINE is no later than July 15<sup>th</sup>**

