

PROFESSIONAL LEARNING FUNDING PROCESS DIRECTIONS FOR APPLICATIONS AND REIMBURSEMENTS

(effective January 8, 2016)

APPLICATION PROCESS:

Step 1: Complete **ALL REQUIRED** Professional Learning Funding Request Forms. These forms can be found on the archdiocesan website at www.archlou.org.

- A. **Archdiocese of Louisville (OLFE) Professional Learning Funding Request Form (Required for ALL Professional Learning Funding Requests)**
1. Please note that the school's Instructional Improvement Plan or the PGP(s) of the person(s) requesting the funding **MUST** accompany the request form. Failure to do so will delay the approval process.
 2. The person requesting the funding must be identified by name and position s/he holds in the school. If more than one person is requesting funding a list of ALL individuals' names and positions must be included with the request form. Failure to do so will delay the approval process. If more than 4 people are requesting funding for the same event, please note procedures under section titled, **Special Circumstances**.
 3. Please remember that funding is allowed **ONLY** for certified teaching and administrative personnel.
 4. The principal must complete the *Principal's Comments* section AND sign the form. Failure to do so will delay the approval process.
- B. **JCPS Form (Required for ALL Professional Learning Funding Requests)**
1. Please note: JCPS will **ONLY** accept information contained on this form. Therefore attachments to this form will not be accepted.
 2. The JCPS Form must be completed in its entirety with **ALL** requisite signatures. Failure to do so will delay the approval process.
 3. When completing the box on the first page of the form, the data listed **MUST** be local/school data (i.e. test data, eWalk data, anecdotal evidence, etc.) and it **MUST** relate to student achievement/progress. If it is not, the form will be returned for revision.
- C. **Archdiocese of Louisville (OLFE) Form T (Required ONLY if the request includes registration fees and/or travel expenses related to the event.)**
1. Please note that additional documentation (a **COMPLETED** registration form for each person attending the event and a brochure or descriptive flyer which includes registration fee schedule and conference housing information for the event) is required. **ALL** documents **MUST** accompany the request form. Failure to do so will delay the approval process.
 2. All registration fees listed must be member rates **ONLY**. Federal funds will **NOT** cover membership dues.

3. Housing expenses should be limited to conference housing. If there is NO conference housing, quotes from three nearby housing venues **MUST** accompany the request. Failure to do so will delay the approval process.
4. Travel expenses apply to air travel only. No reimbursement will be made to cover rental cars, food or other personal expenses. (Please note that for reimbursement purposes, JCPS requires a quote from 3 airlines dated the day of the airfare purchase.)

D. **Archdiocese of Louisville (OLFE) Form C (Required ONLY if the request includes hiring a consultant/presenter.)**

1. All information **MUST** be included on this form and submitted with all other paperwork pertaining to this proposed event. Failure to do so will delay the approval process.
2. When securing a presenter/consultant, it is always desirable to have one all-inclusive fee.

Step 2: Submit **ALL** completed forms with the required documentation to the Archdiocese. They should be mailed or brought to The Flaget Center, 1935 Lewiston Drive, Louisville, KY, 40216, ATTN: Debbie McGillicuddy or Terry Crawley **no later than one month prior** to the event, unless directed otherwise by the Archdiocese of Louisville.

SPECIAL CIRCUMSTANCES

Special Venue Restrictions

At this time JCPS requires that all travel requests to Las Vegas, New Orleans, Alaska, Hawaii, Orlando, or international destinations be reviewed and approved by the Cabinet Superintendent. This means that your professional learning request must have a separate letter from your principal/administrator that clearly explains the benefits of this travel to the students in your school. Once all paperwork is received, the Archdiocese will review the request and if approved, will send a letter from the Superintendent of Catholic Schools and the request to JCPS for prior approval. It is to be understood that until JCPS has approved this event, it is not eligible for reimbursement.

Faith-based Events

Faith-based events MAY receive approval. However it is the general policy that because of the non-secular nature of the event only a portion of the costs may be reimbursed. The amount/percentage of the costs that will be reimbursed is determined by JCPS. Therefore all requests for faith-based events must receive prior approval and reimbursement will be limited to the amount determined by JCPS.

Number of Attendees

If a school wants to send more than four (4) people to a single event, a written explanation from the principal clearly stating the benefits of this to the students in the school must accompany the request. The explanation must include a relative cost comparison of sending these people to the event versus bringing a consultant on site. This must receive prior approval from JCPS.

Notes:

- Book studies
 - Book studies may be funded by providing the **Archdiocese of Louisville (OLFE) Professional Learning Funding Request Form, the JCPS Form, and** a brief description of the books.
 - Books for book studies **MUST** be purchased through the Archdiocese of Louisville. Schools will not be reimbursed for any books they may purchase.

- Consultants/Presenters
 - It is recommended that schools consult with the Archdiocese of Louisville **PRIOR** to hiring a consultant/presenter because a formal contract will be required. If contract exceeds \$4999, this contract must be approved at one of the regularly scheduled JCPS Board meetings.

REIMBURSEMENT PROCESS:

PRELIMINARY UNDERSTANDING:

- ALL expenses submitted for reimbursement must have originally been paid by the individual who attended the approved event, and not by the school via use of the school's credit card, debit card, check, or any other method. Reimbursements for expenses associated with Title IIA approved professional learning experiences will be made to **individuals**. Schools cannot be reimbursed with Title IIA funds.
- All reimbursements come directly from JCPS and are subject to their approval and policies.
- Reimbursements may not exceed the amount approved as stated in the approval letter.
- Checks from JCPS will be sent directly to the individual who attended the approved event.
- The only items eligible for reimbursement are: registration/conference fees, air travel, housing, shuttle/taxi, and baggage. (Please read Step 5 CAREFULLY for specific procedures for each of these.)
- If more than one person attends the same event, each person should pay for his/her own expenses.

Step 1: Once an application for funding has been submitted and approved, a letter/memo will be sent that states the funding request has been approved and outlines procedures for reimbursement. **READ THIS MEMO CAREFULLY.** Failure to comply with any of the reimbursement procedures may place reimbursement in jeopardy and/or delay the reimbursement process.

Step 2: All reimbursement requests and required documentation must be received by the Archdiocese of Louisville **NO LATER THAN 10 DAYS AFTER** the completion of the event. All necessary documentation and signed forms must accompany the reimbursement requests. They may be mailed or brought to The Flaget Center, 1935 Lewiston Drive, Louisville, KY, 40216, ATTN: Debbie McGillicuddy. Requests received after the 10-day period may not be submitted to JCPS.

Step 3: Any documents requiring your signature must be signed in **BLUE** ink. Black ink is NOT acceptable.

Step 4: If ORIGINAL DOCUMENTS are required, scanned and/or Xeroxed copies are NOT acceptable.

Step 5: Your request MUST include the following:

- Your name, social security number, home address and personal telephone number
- An Agenda and Certificate of Attendance (for each person attending) from the event
- **ORIGINAL** receipts from the conference registration, airfare (airline itinerary or travel agent statement), hotel (itemized statement/receipt from the hotel), shuttle/taxi, and baggage (if applicable)
- A copy of the **completed** registration form(s) from the conference
- Proof of payment for registration, airfare, and hotel expenses. Proof of payment may be a **cancelled check** or a **credit card statement**. The credit card statement **must** show name of account holder **and** last four (4) digits of account number showing item(s) charged. If the credit card statement does not show the name and last four digits of the account number, you must include a copy of the credit card used. Please check to ensure the last 4 digits on

the card match the last 4 digits on the statement you submit. Also, check to ensure the amounts charged and the amounts paid match. If not, a note of explanation is required.

- Proof of payment for shuttle/taxi and baggage. Shuttle/taxi and baggage expenses may be reimbursed with ORIGINAL receipts and proof of payment. Proof of payment may be a **cancelled check** or a **credit card statement**. The credit card statement **must** show name of account holder and last four (4) digits of account number showing item(s) charged. If the credit card statement does not show the name and last four digits of the account number, you must include a copy of the credit card used. Please check to ensure the last 4 digits on the card match the last 4 digits on the statement you submit. Also, check to ensure the amounts charged and the amounts paid match. If not, a note of explanation is required. If cash is used to pay any of these expenses, original receipts are the only required proof of payment.
- Completed and signed W9 Form (This form will be mailed to you at time of approval.)
- JCPS Registration Payment Voucher (This form will be mailed to you at time of approval. Please return with your signature ONLY. All other information will be completed for you).
- JCPS Out-of-County Travel Voucher (This form will be mailed to you at time of approval. Please return with your signature ONLY. All other information will be completed for you.)

Questions may be directed to Terry Crawley (tcrawley@archlou.org) or Debbie McGillicuddy (dmcgillicuddy@archlou.org) at (502) 448-8581.

01/19/16