TIGARD-TUALATIN SCHOOL DISTRICT 23J

Professional Educator Fund (PEF)
2026-27 Information

I. GENERAL

1. **WHAT IS THE PROFESSIONAL EDUCATOR FUND (PEF)?**
The objective of the Professional Educator Fund (PEF) is to provide members money to individually allocate towards professional development, instructional supplies or school-related expenses
*Please note that PEF funds are allocated for your current licensed Full-Time Equivalent (FTE) assignment only and cannot be used for items outside your contracted position *(ex: an employee whose licensed position is a classroom teacher, but they also coach track cannot use their PEF for items pertaining to track)*.

2. **WHO GETS PEF AND HOW MUCH?**
Licensed staff members that are 0.5 FTE and greater receive PEF. This includes temporary employees, but not long-term substitutes. An allocation of 4 sub days (including FICA) has been made available to each full-time licensed staff member ($1,017.32). Less than full-time employees (0.5 FTE or greater) will receive a prorated amount according to their assigned FTE. PEF money must be spent for specific allowable PEF use by June 30, 2027.

WHAT IS COVERED UNDER PEF?

- Professional development such as conferences, workshops or seminars.
- Travel costs (lodging, airfare, meals) associated with professional development.
    - **Important Note:** Beginning in the 2026-27 school year, travel arrangements (including hotel, airfare & transportation) shall shift to a reimbursement basis only. Travel expenses must conform to district specifications. Please see section "III. Travel" and *Exhibit A - P*EF Travel Reimbursement Requirements (page 7).
- Sub costs for absences while you attend professional development. Please see the "Substitutes" section below regarding "PEF Professional Development" absence.
- Fees for professional training and purchases of related materials.
- Professional membership(s) that pertain to your current licensed assignment and purchase of professional publications.
- Instructional supplies and school-related expenses that support instruction or your professional development.
    - Please include a brief explanation of purchase on PEF application and/or receipt. (Ex: hands-on geometry project, student incentives, flexible student seating,etc…)
- Cost of tuition only after exhaustion of District tuition reimbursement allowance (per the Collective Bargaining Agreement). Please see the "Tuition Reimbursement" section below.

3. **CAN I USE PEF TO PAY FOR AFTER-SCHOOL ACTIVITIES, COACHING EXPENSES & CLUB SUPPLIES?**
NO. PEF funds are allocated for FTE assignment only; therefore, after-school activities, coaching expenses & club supplies/costs do not qualify and should come out of a different account.

4. **CAN I USE PEF TO PAY FOR GIFT CARDS?**

Possibly. District Administrative Rule DJ-AR **must** be followed.

- Gift cards may be purchased for students or volunteers as incentives/rewards, but are strictly prohibited for employee use or prizes for school sponsored competitions or drawings. Gift cards cannot exceed $25. A detailed receipt & explanation are required.
- Employees that are federally funded, such as Title I or IDEA Special Education, have additional restrictions/requirements, please see DJ-AR.

5. **CAN I USE PEF TO PAY FOR LICENSE RENEWAL FEES?**
   NO. PEF cannot be used for license renewal fees or associated assessment fees.

6. **CAN I USE PEF TO PAY FOR NATIONAL CERTIFICATION?**
   NO. Refer to the Collective Bargaining Agreement.

7. **CAN I USE PEF FOR CLASS AND/OR HOLIDAY DECORATIONS?**
   Please provide a short explanation on how the decor is an instructional supply or a school related expense. Your parent group may be willing to reimburse these types of expenses if PEF doesn't fit.

8. **CAN I USE PEF TO PURCHASE CLASS FURNITURE?**
   PEF can be used for items that enhance instruction or make instruction easier such as rolling desks to teach in different parts of the room, special seating for students, art carts, etc. Furniture purchases must be preapproved by the business office in order to adhere to the district purchasing standards. Please send an email to gl@ttsd.k12.or.us that includes the item and purchase details associated with the request. If the furniture is a staple that should be provided in the classroom, such as bookcases or a standard teacher's desk chair, check with your administrator about using building funds; if building funds are not available then PEF can be used. Additionally, if a specific item is needed due to a medical reason (such as a standing desk) the item can be ordered through HR via an ADA request rather than using your PEF.

9. **WHAT ABOUT ELECTRONICS AND TECHNOLOGY?**
   You are welcome to purchase accessories for your classroom (adaptors, speakers, cords, etc…) through any of the methods listed below in #11. For compatibility and security reasons, check with the District IT department before purchasing any device that connects to District network and cannot be found on the TTSD Technology Purchasing Standards site (https://docs.google.com/document/d/1DF7IhjZKtzwlbe4zSbS3tqL8D7jmexgQALakHBXonv8/edit). *PEF technology purchases can only be made outside of the District Technology Department after you have checked with IT concerning compatibility/security and checked for availability with iVisions Warehouse and District Vendors. IT can assist with obtaining additional vendor quotes.*

10. **WHAT ARE MY PURCHASING OPTIONS FOR PEF?**
    Options include:

- District walk-thru purchase order or purchasing card: See your bookkeeper for options. You can use them at Lakeshore Learning (up to $150/per) and Fred Meyer (up to $150/per). After you have made the purchase, return PO, receipt and PEF application to your bookkeeper. Benefits: possible District discounts and no upfront out-of-pocket expense to you.
- Place order with the District: provide your bookkeeper with a PEF application, the information on which items you would like to order and the vendor name. Your bookkeeper can then place the order for you, either with a purchasing card or through the District system. Benefits: possible District discounts (especially at Office Depot) and no upfront out-of-pocket expense to you. *Note: Items **must** be shipped to a District building/address when using this method.*
- Amazon Business orders: please see your bookkeeper for Amazon ordering options. Benefits: District discounts, free two-day shipping (on most items) and no upfront out-of-pocket expense to you. *(Items **must** be shipped to a District building/address when using this method).*
- Purchase items yourself and apply for reimbursement: to apply for reimbursement you will need

to supply your bookkeeper with PEF application and receipt(s).

- The District shall reimburse members for requests if submitted to the Business Office no later than 60 days after incurring the expense. Requests submitted beyond 60 days will not be reimbursed.
- Receipts must be originals, itemized, dated, show payment method and ***must not include personal purchases***;
- Purpose of purchase should be noted on receipt or PEF Application (important for purchases not obviously school-related);
- Please note: per the IRS, you cannot be reimbursed for a receipt that lists someone else's name.
- Receipts will only be reimbursed if purchases occurred in the current fiscal year (July 1st-June 30th) and are received by June 30th.

Please be sure to complete and sign a 2026-27 PEF Application with each request and to include a brief explanation/justification. Incomplete applications may be returned.

11. **DO I NEED AN ADMINISTRATOR'S APPROVAL TO USE PEF FUNDS?**
    At the requisition level, administrators will review all PEF purchases and reimbursements and either approve or deny the application. For equipment and furniture refer above to #8. For electronics & technology refer above to #9.

    Administrator's approval is required when requesting additional PEF funds, reference "V. Additional $400 Funding" section below. (Reminder: equipment and furniture cannot be purchased with part building/PEF funds and part personal money.)

12. **CAN I USE MY PEF TO PAY FOR FIELD TRIP TRANSPORTATION?**
    If it is an *instructional* field trip then yes. Enter your transportation request into Bushive and under activity select "PEF Field Trip". Be sure to give your bookkeeper a completed PEF application for the trip.

13. **CAN I DONATE PEF FUNDS TO ANOTHER STAFF MEMBER?**
    NO.

14. **WHAT IS THE TIME FRAME FOR USING MY PEF?**
    You have from July 1, 2026 to June 30, 2027 to use the funds. *Orders placed through the district requisition system need to be submitted early to ensure items will be received before June 30, 2027. Items that will be received after June 30, 2027 cannot be ordered with 26-27funds and will be denied. It is highly recommended to submit all reimbursement requests a few days prior to your last contract day. PEF applications for reimbursement must be submitted on or before June 30, 2027.

    PEF purchases using district P-Cards must adhere to year end purchasing guidelines.

15. **WHAT HAPPENS IF I DO NOT USE MY PEF BY JUNE 30TH?**
    Funds not expended, if any, can be carried over to the following year, up to the amount of 3 sub days (including FICA). The maximum amount of PEF funds in your account cannot exceed 7 sub days (including FICA). *(*Subject to current Collective Bargaining Agreement language).*

16. **WHAT HAPPENS IF I OVERSPEND MY PEF?**
    Individuals are responsible for managing their PEF balance. Should you overspend, you will have the following options to reconcile your PEF account:
    1. Reimburse the district through payment (cash or check).
    2. Request the amount be deducted from your following year's PEF allocation.

17. **IF I USE PEFTO PURCHASE CLASSROOM MATERIALS, MAY I TAKE THEM WITH ME IF I RELOCATE TO ANOTHER DISTRICT? WHAT ABOUT ANOTHER SCHOOL WITHIN THE DISTRICT?** Purchases made through PEF are the property of the Tigard-Tualatin School District. You cannot take them with you to another school district, but you can take them to another school in this District. This includes digital cameras. Purchases of equipment must be pre-approved and cannot be made with part District, part personal money as this clouds the ownership question. If equipment was purchased with part PEF and part building funds, then the equipment stays at the building unless released by the principal.

18. **WHO MONITORS AND KEEPS TRACK OF PEF?**
Licensed employees are responsible for tracking their available balance and expenses throughout the year. PEF is a part of the employee's benefits package. Individuals who spend in excess of their yearly allocation must reimburse the district for their overage (see #18 above). PEF will be approved by building administrators through the requisition system, who will review all applications against the established criteria and recommend approval or denial of requests. Balances will be tracked through the district's accounting software. Contact building bookkeeper for questions and balances.

II. TUITION REIMBURSEMENT

1. **REQUEST FOR TUITION REIMBURSEMENT (RTR) USING PEF FUNDS.**
If you are taking a class and have exhausted your tuition reimbursement credits, you may use PEF funds to help pay for the course. Simply mark the box on the Tuition Reimbursement Form that you want to use your PEF funds and send the form to Michelle Clayton in Human Resources. For questions contact Michelle Clayton at mclayton@ttsd.k12.or.us or ext. 4010. PEF payment date rules of July 1, 2026 – June 30, 2027 still apply.

III. TRAVEL

1. **CAN PEF BE USED FOR TRAVEL?**
    - PEF may be used to cover costs for conferences, workshops or seminars, including registration and associated travel costs such as lodging, flight, mileage and meals.Employees using PEF funds must book their own travel. All travel expenses will be reimbursed by submitting the following to your school's bookkeeper:
        - PEF Reimbursement Application
        - Supporting information including conference registration confirmation, official conference schedule, and itemized receipts for travel expenses (ie: lodging, transportation, parking - excludes per diem).
        - The PEF Travel Expense Advance (Mileage and Per Diem) form is found at: https://www.ttsdschools.org/departments/business-office/pef

Detailed instructions regarding ***PEF Reimbursement for Travel*** are attached as Exhibit A (page 8).

2. **WHAT ABOUT MEALS?**
TTSD pays for travel-necessitated meals using per diem allowances. **Employees are highly encouraged to submit requests for per diem meal allowances at least 30 days prior to the trip.** Receipts are not required for per diem meal allowances. Per District Administrative Rule DLC-AR, meals include amounts spent for food, beverage, taxes and related gratuities. As of July 1, 2026, total allowances (including gratuity) are: breakfast $16, lunch $19, dinner $28.

IV. ABSENCES AND SUBSTITUTES

1. **HOW DO I USE PEF TO PAY FOR A SUBSTITUTE?**
Request a substitute in AESOP. Using an absence reason that begins with "PEF" will be your consent to use your PEF funds to cover the cost of the substitute. The cost of a substitute for 26-27 is $254.33 for a full-day (over 4 hrs) and $127.17 for a half-day (4 hrs or less). Turn in the completed PEF form to your

building **attendance secretary**. The cost of the sub will not be deducted from your balance until the week after the absence date. You must be mindful of this as you track your balance and spend funds. *If there is a change to your PEF absence after the funds have been deducted from your balance, please contact GL@ttsd.k12.or.us so that your PEF account can be adjusted.*

2. **PEF ABSENCES.**
   There is one type of PEF absence. Please be sure to select the correct one when entering into Aesop. *If you require a substitute but do not have enough PEF funds in your account to cover the sub costs, you may not use this absence reason.*
   - "PEF Professional Development" is an option that you can use for absences while attending a workshop or conference. If you require a sub, the cost will be deducted from your PEF account.

3. **IF I DO NOT HAVE ENOUGH MONEY IN MY PEF ACCOUNT TO COVER THE COST OF A SUB, CAN I MAKE UP THE DIFFERENCE SOME OTHER WAY?**
   NO. If you do not have enough money in your PEF account, you cannot make up the difference with personal or other funds. *The cost of a sub cannot be split between different account codes.*

4. **MAY I USE PEF TO PAY FOR A SUB SO THAT I CAN WORK ON CURRICULUM MATERIAL FOR NEW CLASSES?**
   NO. Additionally you may not use PEF to pay for special project work you are doing over the summer.

5. **CAN I USE PEF TO PAY FOR A SUB SO THAT I CAN VISIT OTHER SCHOOLS AND OBSERVE PROGRAMS TO ENRICH MY PROFESSIONAL DEVELOPMENT?**
   These kinds of requests require a written explanation, i.e. a plan on how your time will be spent, and will be answered on a case by case basis.

V. ADDITIONAL $400 FUNDING

1. Article 7, D, 1, a: "With written approval from their supervisor and a written plan that outlines why additional funds are being requested and their intended use, members may receive an additional PEF distribution of up to $400 once their original PEF is exhausted. This money may **only** be used to attend a **national conference sponsored by a recognized educational organization** (including travel costs, lodging, meals, and substitute costs if a substitute is required) or to purchase additional **instructional technology."**
   - To receive additional funds you must complete a PEF Additional Funding Request Form and submit along with PEF application and other appropriate documents (conference brochure, travel form, etc…) to your administrator for approval & signature. Once approved, email all documents to GL@ttsd.k12.or.us for HR review & approval. Once you have attained HR's approval please submit all documents to your building bookkeeper for processing.
   - Members must use ALL of their regular PEF allocation before applying to use this additional $400. Requests for this additional money shall be limited to a total of $20,000 annually. Funds are allocated on a first-come, first-served basis. Members cannot "reserve" these funds. Incomplete applications will not be accepted.

VI. OTHER INFORMATION

1. **WHAT DATES DO I NEED TO KEEP IN MIND?**
   - The District shall reimburse members for requests if submitted to the Business Office no later than 60 days after incurring the expense. Requests submitted beyond 60 days will not be reimbursed.
   - Submit PEF Travel Advance (Mileage & Per Diem) forms to the bookkeeper at least 30 days prior.
   - PEF must be spent or encumbered by June 30th. If a summer conference can be prepaid before the 30th of June, this year's money may be used, even if the conference occurs after July 1st. Otherwise, after July 1st the following year's money may be spent, even prior to contract

signing.

- Teachers retiring at the end of the school year may not earmark PEF for summer use.

2. **WHAT CONSTITUTES "PROOF OF PAYMENT"?**
   Original itemized store receipt, cancelled check (front & back), credit card statement, invoice indicating paid, etc. are all valid proofs of payment. (See Exhibit A - PEF Travel Reimbursement Requirements)

3. **WHAT HAPPENS TO MY PEF WHILE I AM ON LEAVE WITHOUT PAY (LWOP)?**
   While you are out on LWOP, you cannot access any of your PEF. However, upon your return, PEF will be reinstated according to contractual provisions.

4. **WHAT ABOUT STUDENT INCENTIVES?**
   You are welcome to use PEF for student incentives, however please be mindful the District's Wellness Policy needs to be followed. (Reference Board Policy EFA: Local Wellness Program at www.ttsdschools.org)

5. **WHERE CAN I OBTAIN PEF FORMS?**
   PEF forms can be found at: https://www.ttsdschools.org/departments/business-office/pef.

Questions? Please contact your building bookkeeper.

Document location: Departments>Business Office>PEF

Exhibit A

PEF Travel Reimbursement Requirements

Travel Guidelines

- Travel using Professional Educator Funds (PEF) is on a reimbursement basis (excluding Mileage and Per Diem)
    - Per Diem is required for all PEF travel, as applicable
        - Food expenses during PEF travel are excluded from reimbursement
    - Per Diem and Mileage will be processed 1-2 weeks prior to travel if forms are received in good form
- Please review DLC-AR for guidelines before booking any travel; if unsure whether conference qualifies for PEF reimbursement, please reach out to bookkeepers/administrator for guidance
- PEF travel reimbursement must adhere to all guidelines in order to be reimbursed

Booking Rules

- As stewards of public funds, all travel must be booked with the most advantageous pricing available. Only book economy class for flights and standard lodging. Optional upgrades, premium services, and other non-essential add-ons are not eligible for reimbursement.
    - Purchases that do not follow this guideline will not be reimbursable for any amount. No exceptions will be made.

How to Submit for PEF Reimbursement

- Ensure conference or workshop and related travel conform with PEF guidelines; confirm with bookkeeper/administrator if necessary
- Register for conference or workshop
- Book necessary travel including flights, lodging and ground transportation, as applicable
- Complete PEF Application(all necessary sections must be completed and itemized receipts attached)Complete PEF Travel Advance (Mileage and Per Diem) Form 30 days prior to travel
- Submit all items to bookkeeper
    - **Note:** hotel charges may be incurred later and should be submitted after payment has been processed. This means that employees may need to complete more than one PEF Application.
    - Staff must submit reimbursement requests to the Business Office no later than 60 calendar days after incurring the expense. Requests submitted beyond 60 days will not be reimbursed.

Reminder: Direct Deposit is available to expedite reimbursements. Employees interested in receiving reimbursements via ACH should complete the ACH Opt-In Form.