

Guide for EEPsA Local Chapter Treasurers

Updated September 2024

Welcome (back) to the exciting role of EEPsA Local Chapter Treasurer. This guide will help get you oriented, outlining responsibilities and procedures for the year, and hopefully reducing back and forth when it comes to submitting expenses. Please have a read through and don't hesitate to reach out with any questions via email: psat66@bctf.ca.

1. What can Local Chapters request funding for?

EEPsA allocates funds each September to support Local Chapters. You can use your EEPsA funding to encourage teacher-driven collaboration in professional development in your Local.

This could include release time, costs associated with hosting meetings, costs associated with hosting professional development events or stocking a professional library for member use. It should not be used to fund field trips or buy supplies for your students' use.

2. Submitting a budget

Please submit a projected budget for the upcoming school year by early.

Budget forms and expense tracking are accessed online with links sent out each fall. You will need to sign in to a Google account and you may need to request access initially to edit the document.

The 'Intro' page in the budget sheet has all the info you need to get started, including a short explainer video.

In the 2024-2025 school year, each local chapter will get a budget of \$300. New local chapters in their first year, may request a budget of \$500.

3. Submitting expenses

1. Complete an [expense voucher](#). This should be completed by the member who incurred the expenses or the Local Chapter Treasurer may complete the form on their behalf and have the member sign.

Be sure they have included:

- a. Member number, name, address, expense info (complete under 'other expenses near bottom'), date, and **member signature**
2. The member should send the **completed EV** and related **receipts** to the Local Chapter Treasurer for review.
 3. Local Treasurer adds these expenses in the Local Chapter Accounting sheet
 4. Local Chapter Treasurer sends EV and receipts to EEPsA Treasurer (psat66@bctf.ca)
 - a. Please include your region and local chapter name in your email.
 - b. Bonus points if you combine documents into a single PDF - [online tool](#) or use Adobe Acrobat.
 5. EEPsA Treasurer submits expenses to BCTF
 6. Member gets reimbursed. This process usually takes less than a month - if you are still waiting at that time, please contact the EEPsA Treasurer. By default, reimbursement is via cheque.
 - a. For faster reimbursement, sign up for [Electronic Funds Transfer](#) (email to psa-accounting@bctf.ca)

4. Tracking expenses

To assist with tracking your expenses and making use of your full budget, please add expenses to your chapter's page within the Local Chapter Accounting sheet as they are filed.