

DESCRIPTION OF AAPT/PTRA FORMS

The following is a list and description of the AAPT/PTRA forms, paperwork, certificates, directories, et cetera. If you need an electronic copy of any of these do not hesitate to contact Jim Nelson. The forms marked with (†) are available on the AAPT/PTRA web site <http://www.aapt.org/ptra/>.

- A] Mission and Goals of the AAPT/PTRA Program
- B] Suggestions for Planning an AAPT/PTRA Workshop This is a document that gives the workshop leader some suggestions based on the experiences of other PTRAs.
- C] AAPT/PTRA Workshop/Summer Institute Planning Guide Guide to help a Regional Coordinator (RC) and/or a PTRAs organize a workshop.
- D] AAPT/PTRA Required Workshop Documentation This is the summary of the forms submitted to AAPT to document an AAPT/PTRA workshop.
- E] AAPT/PTRA Purchase Order Procedures. This is a summary procedures for requesting an advance and for requesting an AAPT purchase order.
- F] (†) AAPT/PTRA Individual Participant Information. This form is used to register participants, and to gather data for evaluation of the AAPT/PTRA project. These forms are to be submitted with AAPT/PTRA Workshop Documentation Form D. See next item.
- G] (†) AAPT/PTRA Workshop Documentation Form D This is the basic form for reporting workshops and requesting workshop leader honoraria. Please turn in only one WORKSHOP DOCUMENTATION FORM D for each workshop topic completed. If a series of dates is used for the same topic (i.e., Electrostatics) you may send a single form for the completed series. Each PTRAs leader whose name is on the WORKSHOP DOCUMENTATION FORM D will receive credit for the total number of hours toward their PTRAs commitment. Each PTRAs whose name is on the WORKSHOP DOCUMENTATION FORM D will also be eligible for an honorarium. For up to 12 participants only one PTRAs leader is supported. For 13 to 24 participants two PTRAs leaders are each eligible for honorarium. For over 24 participants up to three leaders are eligible for honorarium. To avoid duplication in our records, the number of teachers who attended the workshop and the amount of money provided to the AAPT/PTRA CONTINUATION FUND will be prorated among all the PTRAs presenters.

NOTE: When the workshop is a fee for service workshop with up to 12 participants, only one PTRAs leader is supported. For 13 to 24 participants two PTRAs leaders are each eligible for honorarium, and for over 24 participants up to three leaders are eligible for honorarium.

EXAMPLE: Assume Abel, and Best do a workshop for 4 hours with 15 teachers. If 10 of the teachers' school administration cover the cost of the workshop at \$10.00 per hour (i.e., \$40 per teacher) and the remaining 5 teachers pay for themselves at \$5.00 per hour (i.e., \$20 per teacher), the total workshop fee generated for this workshop is \$500 ($\$40 \times 10 + \$20 \times 5 = \500). Abel and Best would both be credited with 4 hours and be eligible for an honorarium. When we record the number of teachers reached, both Abel's and Best's records should indicate 7.5 teachers and credit for funds generated for the AAPT/PTRA CONTINUATION FUND, would be split. If you have questions about the status of the accounting related to the forms you have submitted, you are welcome to contact Jim Nelson, but please do not send in a duplicate form.

With regard to receipts for materials please note the following three items:

1. If a receipt does not show what was purchased and/or the date of purchase, please add that information to the receipt. If you bought tape just add a note on the receipt like the following, "Tape for AAPT/PTRA workshop purchased March 4, 2010."
2. If the receipt postdates the date of the workshop, please add an explanation. For example, "Tape purchased to replace tape used during AAPT/PTRA workshop on March 4, 2010."
3. Do not send receipts for food, unless prior approval is provided.

The following table summarizes the funds available for workshops lead by PTRAs.

	Workshop
Honorarium for Workshop Leader(s)	\$3.00 per hour per participant, minimum \$25 per hour maximum \$80 per hour (or \$500 per day)
Materials Budget	If workshop fee is collected, then \$1.00 per hour per participant
Participant Stipend	none
Workshop Fee	\$10.00 per hour per participant (If teachers pay from their own pocket, cost is \$5.00 per hour.)

- H] **(†)** AAPT/PTRA Vendor Report Form This is a required form to document use of vendor equipment.
- I] **(†)** AAPT/PTRA Perimeter Institute Report Form This is a required form to document support from Perimeter Institute.
- J] **(†)** AAPT/PTRA Vernier Report Form This is a required form to document support from Vernier.
- K] **(†)** AAPT/PTRA Workshop List of Participants Form This is an optional form that workshop sponsors may want in order to know who attended the workshop. If you use this form, please send it to AAPT with your workshop documentation. An easy way to generate the list of participants is to pass the form around during the workshop, and ask each participant to complete it. Home and school addresses are requested. Please remind participants to provide a sufficient address so that mail will reach them. A random sample of participants may be contacted concerning the impact the AAPT/PTRA workshop has had on their teaching.
- L] **(†)** AAPT/PTRA Workshop Sign-In and Stipend Request Sheets For Institutes and follow-ups one of these sheets is used to document participant attendance and if appropriate stipend request. These sheets can also be provided to workshop sponsors who may want to document attendance at the workshop.
- M] **(†)** AAPT/PTRA Item Received by Participants Form This form is used to document that items purchased for participants are provide to participants.
- N] **(†)** AAPT/PTRA Workshop Evaluation Form This is an optional two-page evaluation and feedback form you may use for your workshops. This Evaluation Form is required for for some MSP Summer Institutes.
- O] **(†)** AAPT/PTRA Workshop Evaluation Summary Form You are encouraged to turn in a summary of your evaluations; however, this is not required.
- P] AAPT/PTRA Primary Site License This form will be handed out at the conclusion of the AAPT/PTRA National Leadership Institutes and should be kept with the AAPT/PTRA Teacher Resource Guide(s) to which it applies. This license gives PTRAs the right to legally use the AAPT/PTRA workshop material for their own teaching and for use in AAPT/PTRA workshops. When an AAPT/PTRA Teacher Resource Guide is accepted for publication by AAPT, the primary site license reverts to a secondary site license.
- Q] **(†)** AAPT/PTRA Secondary Site License When you give a site license to participants during your workshop, indicate only the pages or numbers of activities used during the workshop. This license gives participants the right to legally photocopy and use the AAPT/PTRA materials received during the workshop for their own teaching only.
- R] **(†)** AAPT/PTRA Workshop Certificate This certificate is signed by Warren Hein, and Jim Nelson and it has a place for PTRA workshop leader(s) to sign. The certificate can be run off on a blank certificate form available from many stationary stores. The certificate may be

presented to each participant who has completed a minimum of six hours on a particular AAPT/PTRA workshop topic.

- S] Information about and Forms for applying for Continuing Education Units. Participants at AAPT/PTRA workshop have the option of applying for CEU at a modest fee. Please make these forms available to participants during your workshops. See page 48 for procedures for requesting appropriate forms.
- T] (†) Sample AAPT/PTRA Workshop Invoice This is a template for you to use when developing an invoice for a school district or other source of financial support for your workshop. It is not for you to submit your request for honorarium and/or reimbursement to AAPT. The Workshop Documentation Form D is used for these items. If you prefer, Jim Nelson will submit this form for you.
- U] (†) Sample AAPT/PTRA Workshop Receipt This form can be given to participants so they may request reimbursed by their school.
- V] (†) Sample Press Release for National (i.e., First Tier) and for Regional (i.e., Second Tier) Press Release. This is a template that can be used by PTRAs or by participants attending AAPT/PTRA workshops.
- W] (†) Order Forms One form is for ordering AAPT/PTRA Teacher Resource Guides published by AAPT and is mailed to AAPT. The second form is for Pre Publication AAPT/PTRA Teacher Resource Guides, and is mailed to Jim Nelson. These forms can be used by participants to order AAPT/PTRA Teacher Resource Guides. Workshop leaders should pass these order forms out during workshops.
- X] Guidelines for Use of MSP and NSF Funds These guidelines indicate items for which you can be reimbursed.
- Y] AAPT/PTRA Cost-Sharing Documentation Form The form provide for documentation of any cost-sharing involved in workshop.
- Z] AAPT/PTRA logo, Letterhead and Business Card Sample
- AA] AAPT/PTRA Copyright Policy & AAPT/PTRA Teacher Resource Guide Return Policy
- BB] AAPT/PTRA **ListServ** and Website information.
- CC] AAPT/PTRAs A National Treasure.
- DD] AAPT/PTRA Workshop Development Proposal Form This form is for individuals interested in developing a future AAPT/PTRA workshop Teacher Resource Guide.
- EE] 2009 AAPT/PTRA Directory of all PTRA Participants and Leaders.
- INSERTS] AAPT/PTRA Brochure