Professional Development Transfer Policy

CASE recognizes that participants may need to adjust their professional development plans. This policy outlines the conditions under which a participant may transfer their registration to a different CASE Institute or BriefCASE.

1. Eligibility for Transfer
    - Participants may request to transfer their registration to another CASE Institute or BriefCASE within the same calendar year.
    - Transfer requests must be submitted via email to a CASE Team Member.
    - Participants must be in good financial standing, with all payments or purchase order requirements fulfilled.
2. Transfer Deadlines

CASE Institutes (CI):

- Transfers are permitted up to May 15th.

BriefCASEs:

- For BriefCASEs managed by CASE, transfers are permitted up to 30 days prior to event start dates of both the event transferring to and the event transferring from.

Grace Period:

- A 5-day grace period after registration allows participants to transfer to another event with no penalty.

3. Transfer Fees
    - Within the 5-day grace period: No fee
    - After the grace period but before the transfer deadline:
        - CASE Institutes: $100 administrative transfer fee
        - BriefCASEs: $50 administrative transfer fee
    - After the transfer deadline:
        - Transfers are not permitted unless approved under extenuating circumstances.
4. Price Differences and Rate Adjustments
    - If transferring to an event with a higher registration fee, the participant is responsible for paying the difference.
    - If transferring to an event with a lower registration fee, a refund will be issued if the difference is greater than the administrative fee and the price difference between events.
    - Participants who transfers CASE Institutes after the early bird deadline will be charged the standard registration rate, which is $200 higher than the early bird rate, regardless of the original registration date.
    - The effective registration date resets at the time of transfer for the purpose of determining applicable pricing.
5. Capacity and Availability
    - All transfers are subject to space availability at the requested event.
    - CASE reserves the right to deny transfer requests if the requested event is full or cannot accommodate additional participants.
6. Extenuating Circumstances

- Transfer requests submitted after the applicable deadline may be considered in cases of documented extenuating circumstances (e.g., medical emergency, catastrophic incident).
- All such requests must be reviewed and approved by the CASE Executive Committee.
- Participants and/or school districts must provide documentation to support the request.

7. Transfer vs. Deferment
    - A transfer applies to movement between events within the same calendar year.
    - A deferment applies to postponing participation to the following year and is governed by the **CASE Cancellation Policy**.
8. Participant Substitution
    - A registered participant may be substituted by another teacher from the same school or district.
    - Substitutions may be made at no cost if completed prior to the event start date.
    - Substituted participants assume all responsibilities associated with the registration.
9. Scholarship Transfer Eligibility
    - Scholarships are valid only for events approved under the original scholarship program guidelines.
    - If a participant transfers to an event that is not eligible for the scholarship program, the scholarship funds will not transfer, and the participant (or their school/district) is responsible for the full cost of the new event.
    - Participants are responsible for confirming their scholarship eligibility before requesting a transfer.
    - Scholarship eligibility determinations are final and subject to CASE program guidelines.
    - CASE reserves the right to revoke or reallocate scholarship funds if a transfer results in ineligibility.
10. Host-Initiated Changes
    - If a host cancels, reschedules, or postpones an event, participants may transfer to another event without a fee, receive a full refund, or defer participation in accordance with the **CASE Cancellation Policy**.