



TEMPORARY FUNDING POLICY and Receipt Submission Requirements

To adhere to Alberta Education audit requirements, WISDOM has set basic receipt submission expectations of our families. This policy is in effect from October 3, 2016, when AB Education released their new *Standards for Home Education Reimbursements*.

This policy replaces WISDOM's previous funding policy until AB Education clarifies its refund standards.

- 1) **The receipts being submitted should reflect a balanced education.** It is preferable not to reimburse very large receipts, unless there is evidence of other resources being used. Long-term families with many resources that they are re-using for younger children may have larger receipts reimbursed.
- 2) **We require that receipts be sorted and itemized on an Expense Form,** with corresponding dates and totals for books and non-book items filled into the form, and "B" written on the receipt beside books claimed. Foreign currency receipts must have exchange rate documentation or cannot be accepted. (A photocopy of your VISA or PayPal statement may be sent along.)
- 3) **Receipts must be original.** We recommend that you photocopy receipts before sending them to us, for your own record and in case original receipts are lost in transit.
- 4) The Expense Form must be **signed and dated,** and receipts must be sent before the **May 31 deadline.**
- 5) We require that receipts **clearly list items purchased.** If an item is not readily identifiable as a book or non-book item, please write the necessary details on the receipt.
- 6) **If not all items on the receipt are being claimed,** the items being claimed must be indicated, and/or other items must be crossed off.
- 7) Please note that any **shipping, exchange, or tax** incurred in purchasing materials is part of the cost of the items, and can therefore be submitted for reimbursement.
- 8) Receipts are to reimburse parents for consumable and non-consumable resources **that correspond to their Education Program Plan** for their child.
- 9) **Receipts must be for educational supplies or services, corresponding to the list below.** If the item falls in an educational "grey area" the parent must submit a note with that receipt, indicating the way the item contributes to their Education Program Plan.
- 10) **Receipts not adhering to this policy will be returned.** You may appeal our decision in writing; if you believe something should be claimable that was not accepted.
- 11) Parents can expect to receive their refund in **up to 6 weeks.** Sending receipts before September 1 ensures they are checked for the first Fall run, and sending receipts by March 1 guarantees May 15 reimbursement. Receipts may be sent in at any point during the year, but those sent after the last business day in May will apply to the following school year.
- 12) **Receipts expire** after 2 years from the date of purchase, which helps keep current reimbursements reflecting the current plan. Unclaimed and expired receipts may be returned to you, if you wish.
- 13) Please remember to send a **Carry-Over Letter** to the office before June 30th, so that any remaining funds may be carried to the following school year. This is a requirement of Alberta Education, and is the only way funds may be carried over. Letters may be mailed, faxed or emailed. Even if you think you have enough receipts on file to cover funding, please send a carry-over request as a precaution, in case some of your receipts may not be claimed or have expired.
- 14) WISDOM requires that **Education Program Plan(s)** are approved by the facilitator prior to receiving a refund.

Consistent with the Home Education Regulation, **we will reimburse parents who provide us with original receipts for (note Alberta Ed's changes in strikethrough/bold):**

- ❖ learning resources related to the home education program, including:
 - textbooks, workbooks
 - consumables such as paper, pens, notebooks, etc
 - resource books, extra reading books
 - Audio/Video
 - instructional DVDs
 - instructional audio CDs
 - documentaries and other identifiably educational DVDs
 - technology
 - desktop or laptop computer hardware (including upgrades)
 - educational software
 - tablet (iPad or Playbook, etc)
 - e-reader such as a Kobo or Kindle
 - monitor, DVD player etc up to \$200
 - science equipment and supplies
 - materials needed to construct projects that are clearly part of the learning program as indicated on the Program Plan (eg. play-dough, plasticine, clay, glue, building blocks, fabric, science projects, craft supplies, etc.)
- correspondence courses
- internet service, 50% September 1 to June 30
- ❖ educational extras
 - ~~50% of musical instruments up to \$500~~
 - 50% of one sewing machine, or tools, or camera, or telescope, up to \$200
 - ~~federal park pass~~
 - ~~agricultural fair entry fee~~
 - ❖ ~~physical education~~
 - ~~50% of sports equipment, trampoline or bicycle up to \$200~~
 - ~~fitness games such as the Wii Fit, the PS Move, or Kinect~~
 - fitness centre membership fees and classes **for student only**
 - ❖ home school management
 - planners
 - photocopying costs
 - ~~organizational bins or totes (ie Workboxing materials)~~
 - ❖ educational activities **per entry for the student only**
 - museums
 - theatre
 - zoo
 - cultural events
- ❖ admission fees to conferences **only if the conference is a resource in the Education Program Plan**
- ❖ **Detailed receipts** for lessons or classes, including:
 - group classes : group swimming classes, art classes, music classes, dance classes, language classes, etc
 - ~~individual private lessons~~
 - ~~hunter or gun safety up to \$200~~
 - ~~driver's education up to \$200~~
 - ~~flight training up to \$200/year~~
 - fees paid to a **credentialed or certified** tutor; must be detailed receipt listing tutoring dates, subject(s), number of hours and contact information for tutor
- ❖ membership fees **student only**
 - library
 - museum/science centre
 - support group
 - ~~Alberta Home Education Association~~
 - ~~Home School Legal Defence Association~~

WISDOM Home Schooling can NOT reimburse parents for (note Alberta Ed's changes in bold):

- ❖ **musical instruments purchase or rental**
- ❖ **physical activity equipment or rental**
- ❖ **warranties/insurance**
- ❖ **competitions (e.g. swim meets, tournament costs)**
- ❖ **admission for recreational activities like ski passes or a multi-use facility pass**
- ❖ phone plan or long distance costs
- ❖ phones, including smart phones
- ❖ travel costs, including
 - fuel
 - meals
 - accommodation
 - camping equipment
 - camping fees
- ❖ food stuffs
- ❖ furniture of any kind
- ❖ personal items, including
 - clothing
 - shoes of any kind, including sport shoes
- kitchen supplies
- cosmetology supplies
- lumber/renovation costs
- ❖ non-educational videos and DVDs
- ❖ gaming consoles or handheld gaming devices
- ❖ video or computer games ~~other than the fitness games listed above~~
- ❖ yard and garden expenses such as
 - lumber, garden shed, garage, etc
 - quads, tractors or other equipment
 - swimming pools
 - playground equipment
 - playhouse or treehouse materials or packages
- ❖ pet related expenses, including
 - animal purchase costs or "adoption" fees
 - animal food
 - grooming
 - pens/cages/terrariums/aquariums etc
 - veterinary fees
 - animal husbandry, training, etc fees
- ❖ entertainment
 - movie tickets
 - TV/cable/satellite expense
 - Netflix/other movie-rental fees
 - amusement park tickets
 - circus tickets
- ❖ sport extras
 - fishing license
 - hunting or gun license
 - boating license
 - weapons (including archery)
- ❖ graduation supplies (ie cap and gown, grad ring or other attire and materials)
- ❖ photography sessions (including grad photos or other school photographs)
- ❖ Post-secondary courses or training from a college or university.