



Passport Guidelines

A Program for:

Young people with a developmental disability requiring supports to transition to adult services and supports; and

Adults who have a developmental disability, are no longer in school, and are seeking transition planning and community participation supports

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Section 1: Introduction to the Passport Program

These guidelines have been developed to support the administration of the Passport Program – a program for:

- Students with a developmental disability who are preparing to transition to adult services and supports
- Adults with a developmental disability, who are no longer in school, and are seeking transition planning¹ and community participation supports

These guidelines are intended to guide work between the Ministry of Community and Social Services' (MCSS) regional offices, Developmental Services Ontario organizations, Passport Designated Agencies, and community organizations in delivering this program. These guidelines are available to the public on the Ministry of Community and Social Services' website.

Overview

In 2005/06, the government created the Passport Program. The Passport Program was initiated to enhance opportunities for young people with a developmental disability to transition to adult services and supports, and to provide funding for adults with a developmental disability, who are no longer in school, and are seeking transition planning and community participation supports.

The Passport Program exposes participants to a wide range of experiences that focus on post-school activities and the personal development that each individual needs to achieve his/her goals for living as an adult in the community. The Passport Program is also intended to reflect what has been learned from the Ministry's review of the Foundations program, the work of the Ontario Community Inclusion Project, and it also builds on the School Support Program model to work with school boards.

Description

The key goals of the Passport Program are to:

- Assist young people who have a developmental disability to make the transition from school to life as an adult in the community

¹ Adult recipients of Passport Program funding may use up to 10% of their approval allocation for transition planning supports.

- Improve the quality of participation in the community for adults with a developmental disability by providing supports that focus on individual goals, work activities and community participation
- Promote independence
- Foster social, emotional, and community participation skills
- Promote continuing education and personal development

Target Population

The Passport Program focuses on adult residents of Ontario with a developmental disability who are seeking community participation supports and young people in school who are making the transition to adult life in the community.

Passport Program participants have a developmental disability that has been confirmed by a Developmental Services Ontario organization and who:

- Are in school and would benefit from receiving assistance from a mentor to help them plan their transition out of school; or
- Are no longer in school and would benefit from receiving funding for transition and community participation supports; and
- Have been waiting for service and are in need of community participation supports; and
- Are not eligible for Ontario Disability Support Program (ODSP) **employment supports** (i.e. where the individual does not meet the criteria for funding through ODSP-**Employment Supports**); and
- Are living at home with their families or in other living arrangements including group homes, living on their own or with room mates (supported independent living) or with a Familyhome provider. **However, priority will be given to applicants who are living at home with their families.**

Ontario Residency Requirements

Documents confirming Ontario residency include, but are not limited to:

Proof of address:

- Rental or lease agreement
- Statement of direct deposit for Ontario Disability Support Program

- Employer record (pay stub or letter from employer on company letterhead)
- Mailed bank account statements (does not include automated teller receipts or bank books)
- Utility bill

And

Proof of Canadian citizenship, landed immigrant status or permission to stay by Citizenship and Immigration Canada:

- Passport
- Naturalization certificate
- Immigration documents
- Minister's permit

Definition of Developmental Disability

Under the **Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008 (SIPDDA)** and Regulation 276/10, a person has a developmental disability if the person has the prescribed significant limitations in cognitive functioning and adaptive functioning and those limitations²:

- Originated before the person reached 18 years of age;
- Are likely to be lifelong in nature; and

² Under the Regulation, a person has significant limitations in cognitive functioning if the person meets **one** of the following criteria;

- The person has an overall score of two standard deviations below the mean, plus or minus standard error measurement, on a standardized intelligence test, **or**
- The person has a score of two standardized deviations below the mean in two or more subscales on a standardized intelligence test and the person has a history of requiring habilitative support; **or**
- On the basis of a clinical determination made by a psychologist or a psychological associate, the person demonstrates significant limitations in cognitive functioning and the person has a history of requiring habilitative support.

A person has significant limitations in adaptive functioning if the person has a score of at least two standard deviations below the mean, plus or minus standard error measurement, in at least one of the areas of conceptual skills, social skills or practical skills, as measured on a standardized test of adaptive behaviour.

- Affect areas of major life activity, such as personal care, language skills, learning abilities, the capacity to live independently as an adult or any other prescribed activity.

Eligibility Determination

As part of the Ministry of Community and Social Services' transformation of the developmental services system, nine new regional Developmental Services Ontario organizations will serve as single points of access for people to apply for Ministry-funded adult developmental services and supports funded under the **Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008 (SIPDDA)**.

Under the authority of SIPDDA, all individuals wishing to apply for adult developmental services and supports for the first time will contact their respective regional Developmental Services Ontario organization to have their eligibility confirmed and to complete an assessment of their service and support needs using the Developmental Services Application Package. The Developmental Services Application Package includes the Application for Developmental Services and Supports (ADSS) and the Supports Intensity Scale (SIS). The process will be consistent across the province, and includes individuals wishing to apply for the Passport Program.

Effective July 1, 2011 all adults who are applying for the Passport Program for the first time will need to contact the Developmental Services Ontario organization in their region to have their eligibility confirmed and to complete the Developmental Services Application Package. Eligible applicants will be referred to their respective Passport Designated Agency, which will continue to administer the Passport Program³.

To be eligible for developmental services and supports, including the Passport Program, applicants must provide the following documentation:

- A psychological assessment or report signed by a psychologist or psychological associate registered with the College of Psychologists of Ontario (or equivalent body in another Canadian province) that states the individual has a developmental disability in accordance with the Act and Regulation
- Proof of age (document displays individual's name and date of birth)

³ The Passport Mentoring Program is for people between the ages of 14 and 21. As the Passport Mentoring Program is funded under the Ministry of Community and Social Services Act (MCSSA), it is not required to meet the definition of developmental disability and the eligibility criteria outlined in the Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008 (SIPDDA) and Regulation 276/10, nor do they have to have their eligibility for Passport Mentoring confirmed by Developmental Services Ontario. Applicants for the Passport Mentoring Program will continue to work through Passport Mentoring Program Coordinators and Community Living Ontario.

- Proof of Ontario residency (document displays the individual's name and address)

Developmental Services Ontario will review the documents and confirm whether an applicant is eligible for ministry-funded adult developmental services and supports, including the Passport Program. Documents may be originals or photocopies. Developmental Services Ontario reserves the right to view the original documents upon request.

Key Components of Passport

The Passport Program consists of the following key components:

- **Mentoring:** An in-school opportunity for students at the secondary level with a developmental disability to link with mentors who can assist them in exploring post-school experiences and options
- **Planning:** Individuals and families working in partnership with educators and local agencies designated by the Ministry of Community and Social Services' regional offices to assist in supporting the development of individual transition plans as identified under Regulation 181/98 of the **Education Act**. Some funding is available through the Passport Program to assist with planning for individuals who are no longer in school
- **Funding for Transition Planning and Community Participation Supports:** Individuals and/or families have the option of receiving funding directly to purchase community participations services and supports, or they can choose to access services and supports through transfer payment agencies. Passport Designated Agencies will obtain input from community planning / advisory committees on the delivery of the Passport Program in their community

In combination, these activities both serve to strengthen transition planning and enhance the capacity of community participation and/or work activities to address the needs of the target population.

Mentoring Initiative

MCSS contracts with a community-based developmental services agency to deliver the mentoring initiative in partnership with self-advocacy groups. These organizations are responsible to provide mentoring in schools in every region of the province. Individuals may request mentoring or be referred to this program by a family member / caregiver or educator.

Key elements include⁴:

- Career shadowing, including work, community participation activities, and volunteering
- Peer support groups that focus on social skills, peer relationships, and adjustment to community participation activities upon leaving school
- Standardized data collection to measure outcomes such as service targets and participant outcomes

Planning⁵

Under Regulation 181/98 of the **Education Act**, for exceptional students who are age 14 or over and who are not identified solely as gifted, the student's Individual Education Plan must include a transition plan for the student's transition from school to work, further education, and/or community participation activities. Specifically, the process is intended to anticipate the future needs of students so that schools, families, and community resources can plan together for students leaving school and make critical information available to students, parents, schools, and community agencies in order to provide proactive transition planning.

To support the above requirement, the Ministry of Community and Social Services' regional offices have a designated agency to work with school boards to inform the development of transition plans and assist individuals with a developmental disability to access community participation activities. ([See section 3 for more detailed information on transition planning with school boards.](#))

Individuals and families are encouraged to work in partnership with educators and/or community-based organizations to develop preliminary individual plans that build on transition plans developed by school boards consistent with the Ministry of Education's **Transition Planning: A Resource Guide 2002**.

For those individuals and families not connected to community-based organizations, and who choose to use direct funding to purchase community participation supports, funding is available for planning if necessary upon determination of eligibility and funding allocation ([see section 2 for further details](#)).

⁴ See Section 3 for more detailed information on the mentoring component of the Passport Program.

⁵ The Ministries of Children and Youth Services and Community and Social Services have developed a draft Framework to Support Transition Planning for Young People with Developmental Disabilities. This framework has been distributed to regional offices and regional protocols will be developed for implementation in January 2012. Once the Planning Framework has been implemented, the ministry will review the Planning Guidelines for the Passport Program.

To the extent possible, individuals should apply for the Passport Program with a plan that outlines the type of community participation supports they require and the goals and objectives they expect to accomplish.

A planning guide developed by the Individualized Funding Coalition for Ontario titled “**Creating a Good Life in Community: A Guide on Person-Directed Planning**” is available to individuals and their families to support their application for the Passport Program. Families are encouraged to use the planning guide with their son or daughter when thinking about the type of community participation supports available through the Passport Program that would help to meet the goals and objectives they wish to accomplish. Copies of a plain language version of the planning guide are available at the Ministry of Community and Social Services website, www.mcscs.gov.on.ca and the Individualized Funding Coalition for Ontario website, www.individualizedfunding.ca

Funding of Community Participation Supports

Funding is provided to individuals and/or families by Designated Agencies using payment processes approved by the regional office. ([See Section 2 for more detailed information on funding.](#))

To promote an accessible, fair and sustainable system, a standardized application package will be used by Developmental Services Ontario organizations and a consistent process to determine the amount of funding that can be provided will be used by the Passport Designated Agencies. The goal of using these tools is to ensure that similar information is collected from all Passport Program applicants and that consistent levels of funding are provided to individuals with similar needs across the province for community participation supports.

For Directly Funded Supports

The flexibility and choice offered to individuals and their families through direct funding provides a more responsive approach to funding community participation supports.

Passport Program funding can be used to purchase key activities that focus on continuing education, personal skills development such as work activities, employment preparation and vocational activities, volunteering, daily living activities, leisure and social skills.

The maximum hours of support available for an individual should be based on a full time equivalent of 30-35 hours per week.

The Passport Designated Agency will administer funding for individuals who choose direct funding once eligibility and funding allocations have been determined.

For Transfer Payment Agency Services

Existing processes are to be used for individuals choosing to access community participation supports through the existing transfer payment agency system.

Section 2: Administration of Funding for Adult Transition Planning and Community Participation Supports

Background

The Passport Program is administered through the Passport Designated Agencies. Since the inception of the Passport Program, the responsibilities of Designated Agencies have included assisting applicants to complete the Passport Program application form, confirming eligibility for Passport Program services and supports and administering the program.

On July 1, 2011, responsibility for confirming eligibility for services and supports under the **Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008 (SIPDDA)** transfers to nine new Developmental Services Ontario organizations. All new applicants for developmental services and supports, including the Passport Program, will apply to the Developmental Services Ontario organizations who will work with the applicant to complete the Developmental Services Application Package. The Developmental Services Application Package includes the Application for Developmental Services and Supports (ADSS) and the Supports Intensity Scale (SIS). Once the Developmental Services Ontario organization has confirmed an applicant's eligibility under SIPDDA, and has completed the application package, the applicant will be referred to the Passport Designated Agency for Passport Program administration.

Service Principles

The administration of the Passport Program is guided by the following underlying service principles:

- **Person-centred:** Amount of government funding for each individual's supports is based on a consistent provincial application process involving the identification of an individual's strengths, preferences, needs and individual plans
- **Choice and flexibility:** Individuals/families may choose to receive direct funding and arrange supports themselves or to receive services from a developmental services agency
- **Equitable funding:** A similar level of funding is provided to individuals with similar needs across the province

- **Strong families:** The family is recognized as the primary support for adults with a developmental disability
- **Accountability:** Individuals, families and service delivery agents are responsible to ensure that funding is used for its intended purpose and is being effectively managed to achieve the goals and objectives identified in the individual plan

Access/Application Process

Eligibility for the Passport Program is confirmed by the regional Developmental Services Ontario organization based on the eligibility criteria outlined in the Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008 and Regulation 276/10 (see introduction).

How to initiate a referral?

People who are age 16 or 17 and leaving school, and adults who are not in school and seeking assistance with transition planning and community participation supports, can apply directly to their regional Developmental Services Ontario organization to determine whether they are eligible for the Passport Program. Family members and service agencies may assist an individual with the application process. A student age 16 or 17 may apply for the Passport Program while they are still in school, but the application cannot be funded until the individual has turned 18.

How are applications processed?

A Developmental Services Ontario organization must confirm the applicant's eligibility, and if eligible, complete the Developmental Services Application Package, which is used by all Developmental Services Ontario organizations. The Developmental Services Application Package is a fair and consistent approach to accessing community participation supports provided through the Passport Program.

- After July 1, 2011 all new Passport Program applicants will contact the Developmental Services Ontario organization in their region
- The Developmental Services Ontario organization will confirm eligibility under the **Services and Supports to Promote the Social Inclusion of Persons with a Developmental Disabilities Act, 2008 (SIPDDA)**, and if eligible, complete the Developmental Services Application Package
- The Developmental Services Ontario organization will refer eligible Passport Program applicants to the local Passport Designated Agency that administers the Passport Program

- The Developmental Services Ontario organization will provide the Passport Designated Agency with information that is collected from the Developmental Services Application Package
- Passport Designated Agencies administer the Passport Program Guidelines, and:
 1. Determine the level of eligible funding according to the four funding bands
 2. Determine desired and/or available services and supports
 3. Determine the manner in which services and supports will be funded
 4. Determine the priority for resources
 5. Maintain a Passport Program wait list and reports to the regional office as required
- The Passport Designated Agency will notify the applicant when resources are available and advise the Developmental Services Ontario organization of the outcome of the application
- If the applicant chooses direct funding, the Passport Designated Agency will administer the direct funding agreement according to the Passport Program Guidelines
- If the applicant chooses services and supports from a service agency, the Passport Designated Agency will advise the appropriate MCSS Regional Office that will enter into a contract with the service agency for the agreed upon services and supports using normal business practices
- The Passport Designated Agency will utilize existing adult developmental service system processes and tools to determine those individuals found to be most in need of community participation supports, keeping in mind:
 - The intent of the Passport Program
 - The target population
 - Competing service pressures of individuals who have recently left school, and those who have been waiting for service

(See section on considerations for prioritizing access for more detailed information.)

In order to respond to individuals' changing needs and to reflect their ongoing personal plans, the Developmental Services Ontario organization will require the individual to complete an application every five years, unless requested earlier by the individual or family. This allows for an opportunity to revise the individual's plan and level of funding based on the attainment of personal goals, as well as any changes in the individual's level of need.

Considerations for Prioritizing Access

In order to promote a fair and equitable service system, the following considerations represent a minimum provincial standard for Passport Designated Agencies when determining those most in need and prioritizing access to community participation supports. These considerations augment and support local processes and tools where they exist.

- Ability to benefit from support as it relates to individuals in each category of support need. (i.e. the potential for skill development and independence for individuals with low/ minimal support requirements versus quality of life issues for individuals with high/significant support requirements)
- Effect of supports in preventing crisis (for individual and/or family)
- Ability of the family to cope
- Community capacity (i.e. availability and range of generic services and supports)
- Availability of unpaid supports (to the individual and/or family)
- Length of time the individual/family has waited for community participation supports

Funding

The local Passport Designated Agency reviews the summary report provided by the Developmental Services Ontario organization along with the individual's plan or any other submitted information to determine the amount of funding that may be available for community participation supports. In order to promote fairness, the level of approved funding is the same whether the individual/ family choose direct funding or transfer payment agency community participation supports. The amount of funding available for an individual plan is based on the application of funding bands which correspond to four categories of support:

Category of Support	Funding Bands
Low / Minimal	up to \$6,250
Medium / Moderate	\$6251 to \$12,500
High / Significant	\$12,501 to \$18,750
Exceptional	\$18,751 to \$25,000

Please note that these funding levels include the cost of administration for both direct funding and transfer payment agency services.

In order to guide the Passport Designated Agency in determining funding levels, a profile of typical support needs is provided in Appendix C. It should be emphasized that each of the above funding levels represents the maximum funding available and is based on a 12 month funding period. Individual allocations are informed by the identification of the person's support requirements and capacities as outlined in the Developmental Services Application Package and accompanying documentation (e.g., Individual Plan).

Every five years, the individual will complete the Developmental Services Application Package with the Developmental Services Ontario organization to identify changes to their service and support needs. Individual funding allocations are subject to adjustment to respond to the different types of community participation supports required to reflect changing needs.

Consistent with the service principles for this initiative, funding allocations for the Passport program are intended to be portable and available to the individual should they choose to relocate to another community in Ontario.

For Directly Funded Supports

Once the funding amount has been determined, the Passport Designated Agency administers direct funding to the individual/family or to someone on the individual's behalf, as identified on the applicant's individual plan for community participation supports.

Some individuals or their families may require support in developing and coordinating a plan for community participation supports or may require assistance in managing their direct funding. In such circumstances, individuals may use up to 10% of their total approved allocation to purchase planning and/ or brokerage and administrative supports of their choice.

For Transfer Payment Agency Services

Once the Passport Designated Agency has determined the level of approved funding, the individual participates in their chosen transfer payment agency community activity using the normal Ministry service contract processes and business practices. This funding includes the cost of administration, if applicable.

The decision of an individual or family to receive services through a transfer payment agency should be carefully considered in order to avoid untimely and disruptive changes in the method of allocating funding. Circumstances which would warrant a review/change in service delivery agency and/or allocation method might occur, for instance, where the agency is no longer able to provide suitable services, an alternate service becomes available in the community which can better serve the needs of the individual, or the needs of the individual or their support network substantially change.

What can be funded?

Examples of the type of supports that are eligible for funding include:

- Supports to enable participation in further education, including creative post-secondary experiences which promote an integrated academic training program along with personal development. Some examples of such programs include:
 - The Community on Campus Model sponsored by Community Living Mississauga and the University of Toronto
 - The inclusive post-secondary education initiative offered by the H'art School of Smiles in collaboration with Queen's University

Note: Costs of tuition for post-secondary education programs that are eligible for government student assistance programs, as well as supports available through the on-campus Special Needs Office, cannot be approved for funding through Passport.

- Employment preparation activities where the individual does **not** meet the criteria for funding through ODSP Employment Supports
- Work activities, including participation in community settings
- Volunteer activities
- Activities of daily living that enhance social skills, independent living and personal management

- Activities that develop skills in utilizing community infrastructure such as transportation services, shopping, libraries and recreation opportunities
- Personal supports to assist in developing individual plans that identify available unfunded supports as well as required purchased supports*
- Administrative/brokerage supports to assist individuals and families to manage human resources and financial/reporting requirements related to funded supports*

*** Note: As outlined in a footnote on page 1, a maximum of 10% of the total direct funding allocation may be used to fund these activities.**

Staff Resources

Passport Designated Agencies need to maintain the human resource capacity to deliver the Passport Program – including reviewing an applicant’s request (e.g., summary information from Developmental Services Ontario, prioritizing access, applying the Passport Program Guidelines and making individual funding decisions). Additionally, staff need to be knowledgeable of local resources and programs that are available in the community in order to make informed funding decisions in the context of the individual community support plans.

Passport Designated Agencies need to work closely with MCSS regional offices to ensure:

- Recruitment of qualified staff
- Implementation of adequate staffing resources given available funding
- Development of clear roles and responsibilities as they relate to Passport
- Provision of adequate and timely staff orientation and training

The MCSS regional office is responsible to provide support to local Passport Designated Agencies in accordance with current practice and to oversee program and funding decisions in the context of Ministry policies and procedures.

Business Practices

The local Passport Designated Agency provides critical support related to the individual, the development of an informed plan, and the determination of funding resources to put the plan into effect.

As part of this support role, it is important that Passport Designated Agencies work closely with the lead agency that is responsible for liaising with local school boards and maintaining information received from the local school boards regarding the number and the types of support needs of individuals leaving the school system. This information will be used by both local planning groups as well as the MCSS regional office to project and proactively shape developmental services in the community. ([See Section 3 for more information on Liaising with District School Boards.](#))

The local Passport Designated Agencies are responsible for collecting and maintaining data regarding the number of individuals served through the Passport initiative, as well as the hours of support funded.

Examples of the type of data to be collected include:

- Funds approved and committed
- Actual expenditures for the fiscal year
- Average cost of community participation supports per individual served by category of support
- Frequency of reporting
- The age of individuals served
- Type of living arrangement at time of application (i.e. family residence, supported group living residence, intensive support residence, supported independent living residence, host family residence)
- Number of individuals who choose direct funding
- Number of individuals who choose community participation supports through a transfer payment agency
- Number of individuals served full-time
- Number of individuals served part-time
- Total number of individuals served

The MCSS regional office oversees the performance and service outcomes of Developmental Services Ontario organizations and Designated Agencies based on the normal business practices applicable to transfer payment agencies. MCSS also oversees service agency and Developmental Services Ontario compliance with the **Services and Supports to Promote the Social Inclusion of Persons with**

Developmental Disabilities Act, 2008, Regulation 276/10, Regulation 299/10 on Quality Assurance Measures and Policy Directives.

Accountability and Quality Assurance

Passport Designated Agencies cannot be providers of MCSS funded day support/community participation services and must have policies in place to address conflict of interest.

In order to maintain a high level of accountability and quality assurance in the delivery of the Passport Program, it is essential that the Passport Designated Agencies adhere to an equitable and transparent process in determining access to services and level of funding. To assist in achieving this objective, Passport Designated Agencies are to work in consultation with a community planning/advisory group designed to inform service provision.

As well, a separate forum with representation from families and self-advocates is required to inform Passport Program service provision. The role of the forum is not intended to adjudicate applications to the Passport Program but rather to support the role of the local Passport Designated Agency:

- Advising about service needs in the community
- Providing advice and feedback on the effectiveness of current practices and procedures
- Providing input into proposed changes to policy, practices and procedures to improve service provision

Passport Designated Agencies are expected to have an impartial review process that is available to individuals or families who feel that their funding decision has not been fair and equitable. The review committee will meet with the individual and/or family, if requested, to review the applicant's information and individual plan and make any recommendations regarding the funding decision or other procedures and practices for consideration by Passport Designated Agencies. In the event that a resolution cannot be achieved through local processes, outstanding issues may be referred to alternate regional dispute resolution processes that may be in place.

For Directly Funded Supports

Funding provided to the individual or their family/agency must relate to the individual's needs as outlined in the Developmental Services Application Package and individual (transition) plan, where available.

The terms and conditions of the funding are outlined in a contractual agreement between the individual or family/agency and the Passport Designated Agency (See Appendix D, Passport Funding Agreement: Key Components.)

Appendix D describes:

- The amount of the approved funding
- The effective dates for the approved funding
- The roles and responsibilities of the respective parties
- A general description of the outcomes that are to be achieved
- An agreement to an annual review to confirm that funds have been spent in accordance with the agreed purposes
- An agreement that directly funded services and supports must adhere to Ministry values and principles

Funding is provided to individuals and/or families by Passport Designated Agencies using payment processes approved by the regional office.

Individuals and/or families must be willing to manage their own funding or through a third party and are responsible for submitting invoices required to substantiate actual expenditures and reconcile payments. For some families, paying for supports up front may cause financial hardship. In such situations, Passport Designated Agencies have an option of providing families with advance payments for approved Passport Program supports. These advance funds are then reconciled against actual expenditures and subsequent instalments are adjusted to avoid overpayments.

Responsibility for compliance with tax and other laws and regulations, quality assurance and liability rests with the individual (or where designated, the individual's family/agency).

Complaints about the quality of supports purchased through direct funding are taken up with the service provider delivering the program by the individual (or where designated, the individual's family/agency).

Random auditing of funding decisions and individual budgets, using accepted audit processes, is delegated by the regional office to Passport Designated Agencies to assure compliance with provincial legislation and policies.

For Transfer Payment Agency Funded Services

MCSS regional offices continue to use existing business practices (i.e. service contracts, quarterly reporting, random audits), provincial legislation, and policy.

Roles and Responsibilities

Individual/Family

- Act as the primary source in the development and revision of an individual plan
- Identify and mobilize all natural supports to achieve personal goals (i.e. friends, extended family, and support circles)
- Engage in utilizing programs and resources that are available to achieve negotiated goals
- Participate fully in evaluating the effectiveness of funded supports and services as determined by the achievement of identified goals
- Where applicable, administer direct funding in a manner which is responsible and accountable. Where supports are being purchased directly by the individual/family, invoices are submitted to the local Passport Designated Agency to verify the use of direct funding in a manner which is consistent with the approved plan

Transfer Payment Agency

- Use existing financial and data systems to monitor funding commitments and service data for individuals supported through Passport Program funding
- Adapt internal policies and procedures to respond to individuals who may wish to purchase services through their direct funding. This provides an opportunity for the agency to “market” programs and customize them to respond to individual demands
- Maintain effective human resource strategies to respond to the flexibility required by individuals/families seeking purchase of service arrangements
- Maintain strategic monitoring to achieve the necessary balance between flexibility in the service system and program stability to ensure the integrity of the agency infrastructure

Passport Designated Agency

- Maintain current and comprehensive information regarding community resources and programs to inform the development of individual plans
- Coordinate with the lead agency designated by the regional office to inform transition plans developed by educators under Regulation 181/98 of the **Education Act**
- Review summary information provided by Developmental Services Ontario organizations to determine priority access for persons applying to Passport
- Coordinate with community planning/ advisory groups designed to inform service provision
- Determine level of funding
- Where applicable, administer direct funding payments in accordance with approved funding levels, including:
 - Reconciling payments to actual expenditures based on documentation submitted by individuals/families/agencies
 - Maintaining required financial tracking and reporting processes
- Maintain effective working relationships with transfer payment agencies, other service providers, and family members
- Work with MCSS regional offices, local system management committees and local school boards to identify future service pressures and needs
- Review information from the Developmental Service Ontario organizations every five years to evaluate changing needs and adjust funding levels accordingly

The administration of the Passport Program requires sufficient capacity of local designated agencies in a number of areas:

- An effective data collection system to maintain both individual information as well as information on community programs and resources
- An effective strategy for orientation and training of staff

- Maintenance of staff resources and other logistical supports
- Skills and knowledge required to determine funding allocations and, where applicable, administer direct funding payments

Developmental Services Ontario

Along with other mandated services, Developmental Service Ontario organizations are the single point of access for the Passport Program. They confirm eligibility for all new Passport Program applicants and refer them to the local Passport Designated Agency for Passport program administration, and complete a reassessment of all applicants every five years using the Supports Intensity Scale (SIS)

Section 3: Liaising with District School Boards

Context

This section of the guide is intended to assist Ministry of Community and Social Services' regional offices to work with Passport Designated Agencies to carry out their roles to encourage liaison with schools and district school boards to support transition planning. This will help to provide a more consistent transition planning process across the province, with agreed-upon guidelines that encourage and support a more inclusive planning process.

Note: Passport Designated Agencies may also liaise with school boards, or a separate agency may be chosen to perform this role.

Objectives

The key objectives of liaising with school boards are:

- To make critical information available to students, families, and educators about developmental services community participation supports to inform transition planning
- To support referrals to Passport Programs for students leaving school who would benefit from community participation supports
- To forecast community participation support needs and plan for young adults who have a developmental disability and are leaving school, in collaboration with the local Passport Designated Agency

Roles and Responsibilities

Families/Students

Families/students may play active roles in:

- Liaising with teachers and the school principal to learn more about transition planning and to participate as part of the planning team
- Speaking with the local Passport Designated Agency to inquire about locating and accessing local developmental services

Designated Agencies

The role of the local Passport Designated Agency is to:

- Be available if contacted by the local school or district school board to inform transition plans
- Work with MCSS' regional offices to forecast service pressures and trends in the developmental services sector
- Support students and families in the referral process for Passport Program community participation supports
- Coordinate applicants' access to supports

Ministry of Community and Social Services Regional Offices

The role of regional offices is to:

- Designate a lead agency to:
 - Work with school boards to inform the development of transition plans
 - Liaise with schools and families/individuals to inform and provide information about available community supports and services – i.e. conduct workshops in schools or inform planning teams
- Work with local Passport Designated Agencies to deliver Passport
- Work with the local Passport Designated Agencies and Ministry of Education (EDU) regional offices to forecast future needs and service pressures

Ministry of Community and Social Services' regional offices and the local Passport Designated Agency will have established a working partnership with local school boards to aid in the implementation of the Passport guidelines (See Template for Local Protocols). Similar to the School Support Program, district school boards are invited to work with the local Passport Designated Agency to develop protocols that outline the key contacts and roles and responsibilities for collaborative transition planning.

District School Boards

District School Boards are encouraged to:

- Be available if contacted by local Passport Designated Agencies to inform the transition planning process
- Share information about available community supports and services with schools and parents
- Work with the Passport Designated Agency to develop a local protocol in support of transition planning

Ministry of Education (EDU) Regional Offices

Ministry of Education regional office staff are encouraged to work jointly with MCSS regional offices to:

- Establish and maintain communication links in support of the Passport Program, transition planning, and MCSS planning to meet future post-school service needs
- Introduce the Passport Program Guidelines to local school boards and the Passport Designated Agency and encourage the development of local protocols (see below)
- Facilitate communication between local school boards and community agencies in support of the Passport Program guidelines and transition planning
- Share information about successful practices among school boards and community agencies
- Identify implementation issues (re. Passport Program Guidelines and transition planning) and: (1) assist to resolve these issues locally where possible, and (2) inform Ministry policy makers of emerging systemic issues
- Facilitate the provision of (aggregate) information about students to MCSS regional offices to help them to determine the community supports and services required to meet the needs of the students after they leave school

Template for Local Protocols

MCSS and EDU regional offices are invited to work together to encourage local Passport Designated Agency and school boards to develop local protocols in support of transition planning. Possible topic areas might include:

1. Contact information
 - Local contact information of Passport Designated Agency and school board offices
2. Information Sharing
 - Community programs and services information
 - Program descriptions
 - Service system management
 - Referral processes
 - Information to support transition planning (i.e. transition planning documents for agencies' use)
 - Data collection to inform forecasting future service needs
 - Aggregate individual profile descriptors
3. Support Activities in the School Community
 - Agencies' participation at school events (i.e. parent information nights) etc

Appendix A

Passport Mentoring Initiative

This component of the strategy is delivered by Ontario's Community Inclusion Project in partnership with People First of Ontario and/or other self-advocacy organizations in the community.

Initiative Description

The Passport Mentoring Initiative is an “in-school” opportunity to expose students, who have a developmental disability at the secondary school level, to post-school experiences and options. It is intended to enhance their capacity to make informed post-school decisions prior to leaving school, and is available to students between the ages of 14 and 21. This is achieved through adult mentors and Mentor Coordinators in concert with school personnel, parents, and community and support providers (where applicable).

Experienced adult mentors work with the Mentor Coordinators to provide direct exposure to career shadowing, interaction in meaningful community activities, volunteer options and the exploration of alternate post-school opportunities. Additional in-school support includes exposure to and training in social interaction, relationship building, post-school transition adjustments, decision-making approaches and exploration. Mentoring approaches are individualized for each student.

Mentors are individuals who have:

- Active participation in their community (either through daily activities, volunteering, recreation/leisure or work activities)
- A range of functional, relevant and experiential abilities
- People who can offer support and bring valuable experiences
- People who are eager to listen and interact with those students seeking future options

Students are typically people who:

- Have a developmental disability and are in regular and self-contained secondary school classes
- Are between the ages of 14 and 21 years of age

- Seek active participation within chosen options in their communities following school
- Would benefit from leadership/mentoring for transition into community participation activities

Goals of the Mentoring Initiative

The goals of the initiative include:

- Improved quality of participation in the community beyond secondary school education
- Increased exposure to post-school education opportunities for meaningful activities/options
- Increased collaboration between schools, educators, mentors, students and families to assist in identifying post-school opportunities

Key Features:

- Opportunities to learn in both group and individual settings
- Opportunities to participate in the development of social relationships
- Opportunities for family participation
- Community-based learning
- Exposure to an array of activities and experiences
- Work training and volunteer involvement
- Self-directed planning with links to Individual Education Plan (IEP) and student transitional plans
- Development of community linkages and partnerships
- Focus on independence, participation, and inclusion
- Involvement of experienced adults who have a developmental disability in the design, development, and mentoring role for this initiative

This initiative is an ongoing, interactive relationship between identified students, families, school environments, mentors, and the broader community.

The culmination of this initiative provides students with exposure to post-school experiences and options, which will enhance their opportunity to make informed decisions and to connect with these options.

The anticipated outcomes for students include:

- New skill development for daily living, inter-personal relationships and tangible life options
- Ability to express own interests and options
- Exploration and exposure to new community opportunities
- Informed decision-making capacity
- Presence in social/educational/vocational settings
- Interaction and cooperation between parents, community options, and peers.
- Smooth transition from school to adult living
- Community participation

This is an innovative initiative that provides tangible interaction between people who have a developmental disability, school environments, parents, and support providers (where applicable) which enables informed decision-making to take place and open up new life opportunities.

This is achieved through direct exposure to career shadowing, interaction in meaningful community activities, volunteering and the exploration of alternate post-school opportunities.

Additional support includes social interaction, relationship building, post-school transition adjustments, decision-making approaches, and self-exploration.

Roles and Responsibilities

Role of the Ministry of Community and Social Services

- Provide annualized funding to the Ontario Community Inclusion Project to design and implement the mentoring initiative
- Negotiate and monitor the agreement with the Ontario Community Inclusion Project to assure compliance with Passport initiative guidelines, MCSS policies/procedures and quality assurance and evaluation procedures

Role of the Ontario Community Inclusion Project

The Ontario Community Inclusion Project will work in partnership with People First of Ontario and/or other self-advocacy organizations in the community to:

- Administer and deliver the initiative
- Develop initiative framework, building on existing best practices
- Introduce and provide the initiative to willing school boards and schools. .
- Determine access to mentoring in consultation with Mentoring Teams, which includes students, families, educators, Mentor Coordinators, People First of Ontario, other self-advocacy groups, and other relevant stakeholders.
- Ensure the goals of Passport (as indicated in these guidelines) align with the initiative operations
- Gather all necessary information to determine outcome measures and quality assurance
- Match students with mentors, and provide the required support and training to ensure a successful match. Ongoing monitoring of the matches and progress checkpoints (and re-matching if required) would be strongly encouraged
- Meet the implementation requirements within the capacity and resources that are available.
- Oversee spending of all allocated funds by the end of the fiscal year, and ensure that they are managed within spending guidelines
- Develop and conduct an evaluation of the initiative
- Adhere to all government program standards, including compliance with any quality assurance procedures and random spot audit checks

Role of People First of Ontario and/or other Self-Advocacy Organizations in the Community

People First of Ontario, or another self advocacy organization where a local chapter of People First does not exist, will:

- Participate in the development of the initiative's framework
- Participate in the administration and delivery of the mentoring initiative
- Assist in recruiting mentors
- Assist in matching mentors with students
- Participate as mentors
- Assist in the screening of students
- Participate in peer support opportunities
- Assist in providing social support and role modeling to students
- Participate in self-advocacy training

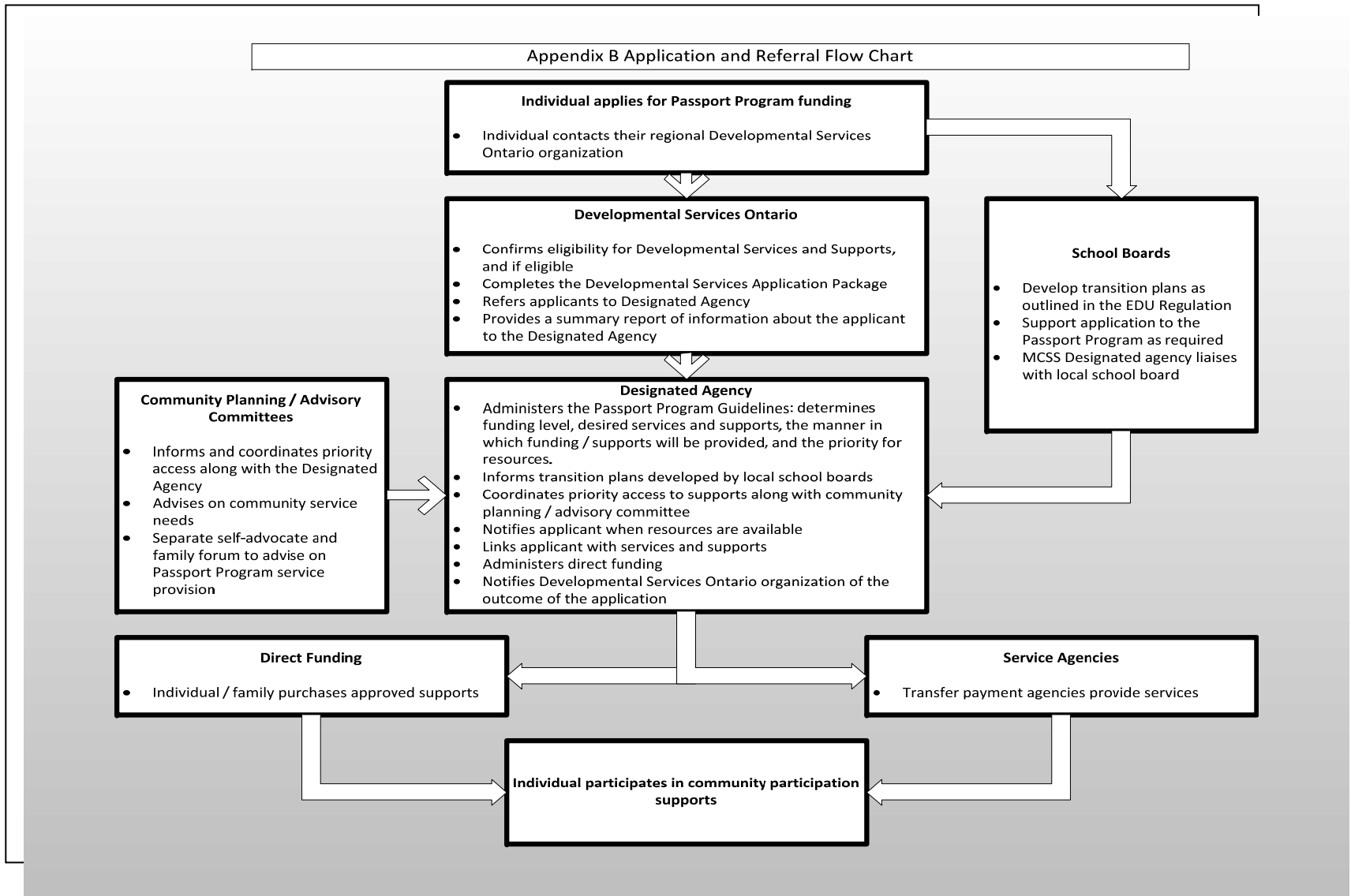
Role of District School Boards

Local school boards are invited to support the introduction and ongoing implementation of the mentoring initiative and work in partnership with the Ontario Community Inclusion Project and People First of Ontario or other self-advocacy groups.

School boards, supported by EDU, are encouraged to:

- Provide relevant information to inform the development and scope of the initiative
- Share information about the initiative with relevant educators, students and families
- Facilitate the participation of relevant educators
- Identify potential participants for the initiative

Appendix B Application and Referral Flow Chart



Appendix C Typical Characteristics and Categories of Support for Individuals

Accessing Community Participation Supports

Category of Support	None	Minimal	Moderate	Significant	Exceptional
<p>Communication and Social Abilities</p> <p>Ability to communicate appropriately and engage in interpersonal and social activities.</p>	<ul style="list-style-type: none"> Enjoys/ works well in group settings Able to convey information, feelings, wants and needs effectively with little/no need of support 	<ul style="list-style-type: none"> Experiences occasional and brief difficulties in managing social interactions. Able to communicate appropriately with periodic, brief support 	<ul style="list-style-type: none"> Requires occasional but more prolonged support in managing social interactions Communication skills moderately impaired. Requires periodic but more prolonged intervention/ support. 	<ul style="list-style-type: none"> Able to work in group situations but requires significant direct supports. Can communicate with significant supports/ intervention 	<ul style="list-style-type: none"> Unable to be supported in group situations. Requires direct supports at all times to reinforce social skills and appropriate communication strategies.
<p>Personal Supports</p> <p>Level of external</p>	<ul style="list-style-type: none"> Able to identify appropriate activities and 	<ul style="list-style-type: none"> May require some external 	<ul style="list-style-type: none"> Able to engage in activities but requires 	<ul style="list-style-type: none"> Limited capacity to engage in activities 	<ul style="list-style-type: none"> Unable to engage in activities, follow

Category of Support	None	Minimal	Moderate	Significant	Exceptional
support/ intervention required to participate in chosen activities.	self-direct to complete them. <ul style="list-style-type: none"> • Able to follow directions and established routines • Significant positive experience in integrated community settings/ volunteerism with little/no support required. 	personal supports but these can be withdrawn for significant periods of time <ul style="list-style-type: none"> • Some experience in community settings with occasional personal supports required. 	regular re-direction/ prompts <ul style="list-style-type: none"> • Personal supports can be withdrawn only occasionally • Some experience in community settings but with significant personal supports. 	without direct support. <ul style="list-style-type: none"> • Frequent need to re-direct activities. • Minimal community experience even with significant supports 	directions and/or routines without direct support.
Behaviour Refers to both the frequency and intensity of behaviours which require interventions beyond normal support	<ul style="list-style-type: none"> • Little / no evidence of extraordinary behaviours. 	<ul style="list-style-type: none"> • Mild behaviours that pose no risk to self, others or environment. • Behaviour 	<ul style="list-style-type: none"> • Significant behaviours occur occasionally but still pose little risk to self, others and/or environment 	<ul style="list-style-type: none"> • Significant behaviours occur frequently and with an intensity that poses risk to self, others and/or environment. 	<ul style="list-style-type: none"> • Similar to “significant” category but require occasional back- up supports to control/ re-direct behaviours.

Category of Support	None	Minimal	Moderate	Significant	Exceptional
expectations.		<ul style="list-style-type: none"> • s able to be managed through reasonable and brief levels of intervention. 	<ul style="list-style-type: none"> • Able to be managed primarily through informal interventions . Formal behavioural interventions or protocols are required only occasionally and for a limited period of time. 	<ul style="list-style-type: none"> • Behaviours may include aggression with little/ no antecedents, self-injurious behaviours, property destruction, running/wandering with little awareness of personal safety. • Formal behavioural procedures and protocols required for sustained periods of time. 	<ul style="list-style-type: none"> • Often requires adherence to extensive formal behavioural procedures/ protocols.
Personal Health and Medical Care Refers to the ability of the individual to	<ul style="list-style-type: none"> • No extraordinary medical needs are present • Able to 	<ul style="list-style-type: none"> • Minimal and occasional health issues are present 	<ul style="list-style-type: none"> • Significant but occasional medical conditions are present 	<ul style="list-style-type: none"> • Significant and frequent medical conditions are present that pose 	<ul style="list-style-type: none"> • Exceptional and prolonged / permanent medical issues or

Category of Support	None	Minimal	Moderate	Significant	Exceptional
<p>manage his/her own personal care and the level of medical interventions required to maintain appropriate levels of personal health.</p>	<p>manage personal care with little/no assistance.</p>	<p>and pose reasonable demands on support workers.</p> <ul style="list-style-type: none"> • Requires periodic and brief prompts in some aspects of personal care 	<p>but pose minimal health risk to the individual.</p> <ul style="list-style-type: none"> • Interventions are intermittent and/or brief and are effective in resolving condition • Occasional medical procedures may be required but do not require specialized staff. • Occasional but more prolonged prompts 	<p>moderate, but non life-threatening risk to the individual. Occasional formal medical interventions/procedures are required.</p> <ul style="list-style-type: none"> • Occasional formal medical Interventions are required • Interventions/procedures require personal supports with some training in specialized procedures. 	<p>conditions requiring frequent and complex interventions .</p> <ul style="list-style-type: none"> • High level of technological dependence . • Medical condition is considered “fragile” where appropriate and timely medical supports are required to avoid medical crisis. • Total dependence in all

Category of Support	None	Minimal	Moderate	Significant	Exceptional
			required for most areas of personal care. May require occasional hand over hand support.	<ul style="list-style-type: none"> • Dependent on personal supports for most aspects of personal care. 	aspects of personal care.
<p>Supervision</p> <p>The amount and intensity of supervision required to access community participation supports.</p>	<ul style="list-style-type: none"> • Requires little or no direct supervision. 	<ul style="list-style-type: none"> • Requires occasional but brief periods of direct supervision 	<ul style="list-style-type: none"> • Requires frequent but brief periods of direct supervision. 	<ul style="list-style-type: none"> • Requires frequent but more prolonged periods of direct supervision. 	<ul style="list-style-type: none"> • Requires dedicated direct supervision occasionally requiring periods of enhanced staffing.

A resource to Local Passport Designated Agency to assist in developing or augmenting direct funding agreements

Appendix D

Passport Funding Agreement

Key Components

It should be noted that the information provided below is intended as a guide for use by the Passport Designated Agencies. It is advisable that local Passport Designated Agencies obtain legal advice in developing the contractual agreement used to administer direct funding.

A. Acknowledgments

1. Acknowledgement that the local Passport Designated Agency is a non-profit organization recognized by the Ministry of Community and Social Services (MCSS) as a transfer payment agency to receive funds intended to provide support services for individuals with a developmental disability.
2. Acknowledgement by the individual⁶ that, while the Passport Designated Agency may have provided information to the individual with respect to services and supports available in the community, the final decisions with respect to the manner in which services and supports are to be provided as well as decisions to hire, contract with or engage, any persons/agencies/companies or other entities to provide any of the services or supports have been made by the individual.
3. Acknowledgement by the individual that the local Passport Designated Agency has no responsibility or liability to the individual for any of the services or supports provided by the provider. Personnel hired by the individual to provide supports and services are not employees of the local Passport Designated Agency.

⁶ May also be a member of the individual's family or an unrelated person from the individual's support network, on behalf of the individual.

B. Responsibilities of the Individual

Individuals may wish to obtain legal and other professional advice, as required, to clarify their responsibilities and recommended practices.

1. Where supports are being provided by staff hired by the individual, the individual will ensure that administrative and personnel practices are in place that meet the requirements of Employment Standards, the Labour Relations Act, the Workers' Compensation Board and Canada Revenue Agency and will be responsible for ensuring that adequate general liability insurance is in place.
2. Where supports are being provided by staff hired by the individual, there is agreement that the individual is responsible to:
 - a) Hire, set wage rate, supervise and schedule the workers(s)
 - b) Adhere to acceptable personnel practices as required by Employment Standards, Labour Relations Act, Workers' Compensation Board, Canada Revenue Agency and any other government legislated act as relates to employer/employee relations
 - c) Be responsible for the supervision of workers, quality of services and for any liability pursuant to any matter between workers and family including responsibility of ensuring that adequate general liability insurance is in place when support is provided by a person hired as an employee.
 - d) Be solely responsible for remitting to the proper authorities all necessary statutory payments and remittances (if any) including, without limitation, Income Tax, Employment Insurance, Canada Pension Plan, Employer Health Tax, Federal and Provincial Taxes, including HST.
3. Where the individual engages services from a self-employed support worker:
 - a) It is advisable for the individual to clarify in writing that the self-employed worker is solely responsible for remitting to the proper authorities all necessary statutory payments and remittances (if any) as stated in 2.(d) above.
 - b) Keep on file all invoices from independent contractor for support services as per contract as required in 3.(a)

4. The individual is responsible to report to the Passport Designated Agency in a timely manner as to the disposition of funds received and the effectiveness of purchased services and supports in achieving identified goals and objectives.
5. The individual agrees to provide the Passport Designated Agency with such reasonable documentation as it requests including all documentation required by MCSS.

C. Responsibilities of the Passport Designated Agency

1. Agreement to disburse to the individual such funds as are received by it on behalf of the individual in a timely manner as per the approved budget set forth in the funding agreement.
2. Agrees to be accountable to MCSS for the disbursement of funds as set out in the funding agreement.
3. Agrees to provide the individual with a report, upon request, outlining expenditures to date and the amount of funding remaining for the term of the funding agreement.
4. Agrees to accept no responsibility for hiring, supervision, evaluation or liability pursuant to any matter between the support service provider and the individual.

D. Terms of Funding

1. Clear identification and agreement between the individual and the Passport Designated Agency outlining the amount of funding to be provided pursuant to the agreement.
2. Clear identification and agreement between the individual and the local Passport Designated Agency outlining the term of the funding agreement, including the start date and end date.
3. Agreement that all funds disbursed by the Passport Designated Agency pursuant to the funding agreement shall be used to purchase community participation supports and services consistent with the objectives of Passport.
4. Agreement that the direct funding contract may be terminated by either party, upon 30 days notice in the event that funding from the Ministry of Community and Social Services ceases or in the event that alternate arrangements are requested.

5. Agreement that the local Passport Designated Agency may terminate the funding agreement at anytime without notice if sufficient cause exists that funds are not being used for their intended purposes.

Waiver of Confidentiality

1. Inclusion of a statement that addresses:
 - Agreement by the local Passport Designated Agency to respect the right to privacy of all individuals and strictly protects and keeps confidential all personal information gathered in the course of providing a service, subject only to legal limitations and audit requirements.
 - Agreement that the individual understands that the local Passport Designated Agency will not forward any confidential information respecting the individual and/or his or her family to MCSS, but acknowledges that MCSS has the right, as a condition of funding, to audit confidential financial files on a demand basis.

E. Execution of Agreement

1. Inclusion of a statement that the funding agreement has been agreed upon by the parties, indicating the date of execution of the agreement.
2. Inclusion of appropriate space for signatures of individual and signing authority on behalf of the Passport Designated Agency, including date of the respective signatures.