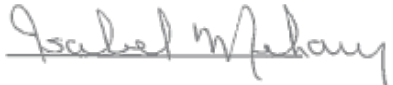


Guidelines for the Use of Personal Needs Allowance

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POLICY STATEMENT

Kerry's Place through the Mission, Vision and Values works toward Continuum of Supports by teaching and assisting people in our residences to manage their personal spending account. To fulfill the Quality Assurance Measure requirement as outlined in Ontario Regulation 299/10, Kerry's Place shall ensure financial records prepared and maintained in accordance with subsection (2) are independently reviewed by a third-party annually. The on-going status of the independent review shall be reported quarterly to the Board of Directors.

Purpose

To establish protocols for the use of the Personal Needs Allowance of the people we support and to monitor and reconcile.

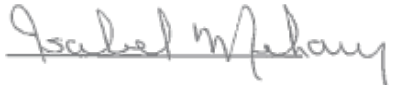
Scope

Applicable to all persons supported residentially through Kerry's Place Autism Services who are supported through ODSP (Ontario Disability Support Program) including certain third-party and Host Family providers.

Definition

A Personal Needs Allowance is the portion of a person's ODSP that is intended to enrich the quality of his/her life. The money is intended to purchase goods and services not considered to be the responsibility of Kerry's Place Autism Services. The amount of the Personal Needs Allowance is set by the Ministry and is adjusted from time to time.

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USES OF PERSONAL NEEDS ALLOWANCE (PNA)

Terms and Conditions

Individual Purchases

The PNA is to be used for purchase of additional items beyond basic need items provided by Kerry's Place and services such as hair styling or related services.

Persons who live in Kerry's Place residential homes at the residential rate have their accommodation and basic living expenses covered by Kerry's Place. There is no Kerry's Place-wide, standard amount of money allocated to clothing per individual. Not all individuals will need the same amount of basic clothing each year, and clothing is just one of the many expenses charged to Kerry's Place' Personal Needs budget line (and not charged to the supported individual).

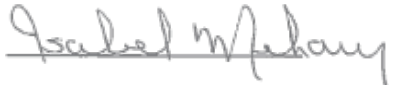
Collective Purchases

If a purchase needs to be made as a shared good or service that benefits the group as a whole and is not considered the responsibility of Kerry's Place or enhances a good or service already being provided by Kerry's Place A statement of cost for the purchase with a calculation of individual cost will be placed in the reconciling journal.

Individual or Group Requested Outings

A person may wish to use his/her Personal Needs Allowance to pay for expenses for various activities such as vacations, shopping, entertainment summer camp, etc. (PNA money should only be used to pay for going to a camp or going on vacation to the cover the

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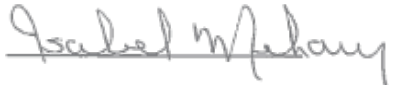
level of cost, if there is any, that would be incurred by Kerry's Place in excess of the normal cost of supporting individuals where they normally reside).

Out-of-Pocket Expenses of the Individual's Family, Friends, Volunteers

A person may use his/her Personal Needs Allowance to pay the out-of-pocket expenses of family, friends and/ or volunteers whom the individual wishes to visit him/her or who are escorting the individual on a trip or to a special event. It is expected that this type of expenditure would support family relationships for the individual and would be pursued in the interests of developing those relationships in the context of the individual's wishes and life plan. Such expenditures would only occur where financial hardship is an issue such that absorbing the expense on the part of the family member, friend or, volunteer would cause hardship to the point where a special event, trip or contact would be threatened. If there is suspicion that a person is being taken advantage of, it must be brought to the attention of the Manager for resolution in consultation with the person and possibly their support circle.

Personal Needs Allowance is not to be used to pay for employee expenses while being supported by employees except under exceptional circumstances such as when supported individuals are going on vacation and they need to cover the additional cost of hotel room or an airline ticket for a staff member or the cost of higher-than-usual staffing levels required to make the vacation possible. Such decisions should be made in consultation with the Manager, the supported individual, and the support circle or the Substitute Decision Maker (unless the individual is opposed to the SOM or support circle being involved).

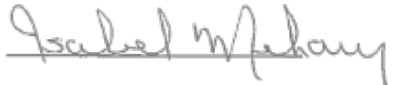
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GUIDELINES FOR ASSISTING INDIVIDUALS WHO REQUIRE ASSISTANCE WITH MANAGING THEIR PNA

- If a supported individual requires assistance with management of their finances, this must be noted in that individual's support plan.
- Whenever possible, ODSP payments will be directly deposited into the individual's personal bank account. Payments will be made to Kerry's Place for the services provided.
- When possible, the supported individuals should be taught how to handle their own money and make purchases. When supported individuals or the Kerry's Place employees accompanying them must obtain a receipt. These receipts will be attached to the monthly bank statement.
- Separate account books and financial records must be maintained for each person.
- Monthly bank statements will be reviewed by the site Manager on an ongoing basis. The manager will identify a third-party reviewer who may be another site manager or residential coordinator and who does not have responsibility for the account. As part of the review of the PNA account, the reviewer shall look for any anomalies in spending patterns which are to be reported to the respective manager at the site where the supported individual resides.
- The Manager will investigate the situation for which anomalies in spending patterns were found. For the protection of the person supported, the Manager, in consultation with the person supported and possibly the support circle may put specific controls in place.

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- If, after the Manager investigates the matter, the criteria for reporting the matter as a serious occurrence is met, the Manager shall follow the Kerry's Place guidelines for serious occurrence reporting.
- No funds shall be used to benefit the staff, their relatives, or Kerry's Place Autism Services organization.
- Other income earned or received by the person should be maintained in a similar manner.
- Quarterly summary reports of PNA spending completed by the reviewer shall be sent to the Regional Executive Director.
- The Regional Executive Director shall inform the Chief Executive Officer with a summary of the Third Party PNA reviews as part of their quarterly update reports.
- The summary report shall note the number of supported persons who required third party review of their Personal Needs Allowance for the fiscal year and whether the records indicated any discrepancies.
- If discrepancies or anomalies were noted, the report shall provide a summary of actions taken.
- The Chief Executive Officer shall provide the Kerry's Place Board of Directors with a summary of the Third Party PNA reviews as part of the quarterly CEO report.
- Consent from the person supported for these reviews and reporting will need to be obtained.