

CLDS program – Summary of Planning Documents

The following table identifies the CLDS program planning documents required for persons receiving CLDS funded services. More details are available in the respective policies and accompanying documents on the [CLDS program website](#).

Document and authority	Description	Developed by who	Update/review frequency and oversight responsibility	Who gets a copy
1. Individual Plan <i>Section 11(1) - 12 of The Adults Living with an Intellectual Disability Act</i> <i>CLDS program – Individual Planning Policy</i>	Individual planning is intended to be a holistic, intentional process to create an individual plan for <u>every person</u> receiving support services from the Community Living disABILITY Services (CLDS) program and assist them to identify the services and supports they may require to meet their needs and goals.	The individual plan is developed, updated or revised, and monitored by the planning team members chosen by the person receiving support services from the CLDS program.	At least annually A shared responsibility between planning team members, service provider, and/or CSW	• The person and their support network • Planning team members • Substitute Decision Maker (if applicable) • The service provider(s) • The person's Community Service Worker
2. My Support Plan <i>CLDS program – My Support Plan policy</i>	A " My Support Plan " is developed and maintained for all persons receiving <u>agency-delivered services</u> and/or residing in a home share placement funded by the CLDS program. A "My Support Plan" identifies how supports are provided day-to-day and is crucial to ensure that assessed needs of an individual are met. Other situation specific plans such as behaviour support, restrictive practices or restraints, health care protocols, delegated nursing tasks, and individualized support (home alone) may be included within the "My Support Plan".	A "My Support Plan" is developed and maintained by the service provider(s). The service provider contacts the CSW if a situation-specific plan or protocol is required within a "My Support Plan".	At least annually Service provider with support from CSW and SDM	• The person and their support network • Substitute Decision Maker (if applicable) • The service provider(s) • The person's Community Service Worker
3. Personal Financial Plan <i>CLDS program – Management of Personal Funds policy</i>	A Personal Financial Plan is developed for individuals receiving CLDS funded services if they <u>require assistance with managing their finances</u> . Most individuals receiving SIL services may not need a financial plan.	A Personal Financial Plan is developed by planning team members.	At least annually A shared responsibility between service provider CSW, SDM including PGT where applicable and RCL for inspecting records.	• The person and their support network • Substitute Decision Maker (if applicable) • The service provider(s) • The person's Community Service Worker