



Policy Number: SE4.190	Policy Section: Supports and Services	Effective: March 26, 2008 Revised: December 15, 2009
Title: Individual Support Planning		Executive Sponsor: Directors, Regional Operations

1. PURPOSE

CLBC offers a range of funding and planning options that promote choice, flexibility and community inclusion. CLBC provides support for developing Individual Support Plans. These plans are developed by individuals and their families to identify needs, strengths and goals. Plans also outline unfunded supports and may include requests for CLBC funded supports and services which are linked to individuals' needs, strengths and goals. Plans are used by CLBC staff to make decisions about the CLBC funded supports and services that will be provided.

This policy outlines the content required in Individual Support Plans and explains when plans are required for CLBC funded supports and services. The policy applies to:

- plans developed by individuals and their families on their own, or with the support of others
- plans developed by individuals and their families with support from a facilitator
- plan reviews conducted by analysts

2. DEFINITIONS

Individual Support Plan: a document that includes information about an individual's goals and support requirements, and the funding and services identified to meet them.

Individual: a person 19 years of age or older who is eligible for CLBC services, as described in the CLBC eligibility policy.

Individualized Funding (IF): a funding option that provides individuals and families with flexible, person-centred, self-directed payment options for arranging, managing, and paying for supports and services as described in the Individualized Funding Policy.

Support Network: friends, family and/or community members who provide personal support, advocacy and/or help with monitoring services and who have reciprocal relationships with individuals.

Youth: a person who is over 16 years of age, but under the age of 19 who will be eligible for CLBC adult services, as described in the CLBC eligibility policy.

3. POLICY

Individual Support Plans can be developed by an individual on their own, or an individual and their family, or a support network, friend or trusted advisor, or they may be developed with the support of a CLBC facilitator.

A CLBC facilitator can help with developing an Individual Support Plan when requests for new CLBC funded supports are included in the plan. A facilitator may also assist with developing an Individual Support Plan when an individual wants to change their existing CLBC funded supports and services to address new circumstances or goals. Facilitators can also provide assistance with planning for access to generic and informal community supports when CLBC funded supports are not requested.

When Plans are needed for CLBC funded services they must:

- include a description of the individual and their strengths, goals and support needs
- reflect and rationalize cost effective support options without compromising the plan integrity or service quality
- be consistent with the vision, mission and values of CLBC
- consider the use of generic services and informal community supports and employment options, as well as CLBC funded services
- provide a clear linkage between an individual's disability related needs and the supports and services requested to address disability related needs and to achieve the identified goals
- outline how goal achievement will be evaluated

Plans are needed to request CLBC funded services when:

- the combined services requested are in excess of \$6,000 per year
- emergency funds in excess of \$6,000 have been expended in response to an acute, critical situation, and it is anticipated that the service provided will be required ongoing. When this occurs, plans are to be completed within six months of when the support was put in place
- waitlisted support requests, or requests on the planning registry, in excess of \$6,000 per year that will likely receive funding within six months (plans developed for youth transitioning to CLBC may be developed prior to a youth's 19th birthday to facilitate timely access to CLBC adult supports)
- a different residential setting is requested
- a different vocational, or community inclusion activity, is requested
- an immediate family member is identified as a potential service provider
- individualized funding in excess of \$6,000 is requested

Plans are not needed to support requests for CLBC funded services when:

- an acute, critical situation emerges that requires immediate, emergency funding
- support requests are being identified only for waitlisting purposes
- small amounts of service such as respite or relief, with a combined cost of less than \$6,000 a year, are requested
- services requested are in excess of \$6,000 a year, but are time limited and goal focused, for example supported employment or life-skills training

When requests for funded services are received:

- Facilitators will review the plan to ensure that all required information is included before forwarding to an analyst for a review of funded service requests. If more information is needed to support the request, the facilitator will work with the individual and their family to gather required information. Analysts will provide information to the facilitator about the amount and type of funding that can be provided based on the review of the funded service request. The facilitator will provide this information to the individual and their family, with the support of the analyst as required.

Funds will be allocated in a manner that supports the reasonable, consistent distribution of available resources while increasing an individual's opportunity to be involved in their community. Supports and services that are the responsibility of other ministries or agencies such as medical services, education or income support will not be funded by CLBC.

4. PROCEDURES

4.1 Facilitators provide information to individuals and their families about the purpose of planning and explain when Individual Support Plans are needed. They can also provide assistance to develop plans. A copy of "Developing an Individual Support Plan" should be provided as resource material.

4.2 Required Plan Information:

Although Individual Support Plans may be completed in a range of formats, all plans must address the key elements listed below, along with a clearly defined support request that is based on this information:

- a. Summary:** key points of the entire plan including a high level summary of what funding/services are being requested and why, and how the individual or youth was involved in the plan development
- b. Personal Profile:** a description of the individual or youth that outlines personal characteristics. Relevant information includes how the individual or youth:
 - i. communicates with others
 - ii. requires assistance with personal care
 - iii. builds or maintains relationships
 - iv. stays safe from harm
 - v. participates in work or educational activities
 - vi. takes part in community activities
 - vii. if applicable, has complex health or mental health needs
 - viii. has complex needs or other risk factors that need consideration
 - ix. makes important life decisions
 - x. makes day to day decisions
- c. Type and Cost of Supports:** a description of the requested CLBC funded supports that are tailored to different aspects of the individual's life and goals, how disability support needs have been met in the past, the role of informal community supports and generic services, other sources of funding, and support contributions from the personal support network
- d. Method of Payment:** a statement on whether the funding method should be individualized funding (Direct Funding or Host Agency), through a service contracted by CLBC or a combination
- e. Safeguards:** a description of the intentional approaches taken to support the individual safely

- f. **Evaluation:** a description of how success will be measured
- g. **Additional Information:** any additional information needed to support the plan
- h. **Contact Information:** information on how to contact the person who is the primary point of contact about the plan

4.3 Developing Plans

a. Facilitators will be available to provide support during the planning process when individuals/youth and their support networks choose to develop a plan independently. Individuals/youth and their support networks completing plans independently are encouraged to seek involvement and consultation of others.

b. When developing plans, facilitators will provide information and guidance to individuals/youth and their families about person-centred services and practice approaches that support CLBC's vision, mission and values.

c. Analysts will be available to facilitators for consultation to provide information that may assist with plan development which will include information about the likely support levels based on disability related need. Other relevant information that analysts can provide may include information about potential service providers and budget and waitlist information to ensure that the individual and their support network are planning with the best information possible. The facilitator will provide the information that they gather from an analyst to the individual and their support networks. At times a joint meeting with the individual and their support networks, the facilitator and the analyst may be required. In this case, the analyst can use this session to gather information on recruitment strategies to attract the type of service providers envisioned.

4.4 Completed Plans

a. All completed plans will be submitted to the community living centre. A facilitator will be identified as the point of contact for the individual and their family to support them during the process of plan review and service implementation. The facilitator will review the completed plan to ensure that the supports and services requested match the individual's goals and that all required information is included in the plan.

b. If the plan does not include all of the required information to support a funding decision, the facilitator will explain to the individual and their family which specific elements of the plan need clarification. If the individual/youth or family has completed the plan independently the facilitator can offer to support them to revise the plan or suggest that the individual/youth or family seek support from others for revising the plan.

c. Once a plan is completed, the facilitator will submit it to the quality service office and an analyst will review the plan in relation to the service request.

4.5 Service Request Review

a. The analyst will review the plan analyzing the supports and services requested in relation to the disability related need. Resources will be allocated according to funds available, standard ranges of costs for the geographic region and services typically provided in relation to an individual's disability-related need.

b. Within 30 days of receiving a plan, the analyst will contact the facilitator who is the individual's key point of contact and advise them about the outcome of the plan review indicating which service requests will be funded, which service requests will not be funded and which service requests will be waitlisted (in accordance with the CLBC Waitlist policy).

c. The facilitator will deliver information to individuals and their families regarding the outcome of the plan review and the availability of funding and resources. The analyst may sometimes participate in the plan review outcome meeting. The analysts may also provide information about other CLBC funded supports or services that may be available or appropriate.

d. The facilitator will document the plan review outcome in a letter which will be sent to the individual and their family outlining which service requests will be funded, which service requests will not be funded and which service requests will be waitlisted. The facilitator will ensure that a copy of the letter is placed on the youth's or adult's PARIS file.

4.6 When funds are made available to provide all or some of the service requested in a plan, the individual, family, support network, facilitator and analyst involved will work together to implement the service.

5. PRACTICE

5.1 Each plan should be unique and reflect the dreams, needs and wants, strengths and assets, and goals of each individual when requesting services and supports from CLBC. Plans should include information that helps the analyst make a decision about what is being requested.

5.2 The content and amount of information that goes into a plan should be consistent with the complexity of what the individual is requesting.

5.3 When collaborating with individuals and their families and support networks to create a plan it is important for facilitators to:

- a.** acknowledge the expertise, strengths and abilities of the individual and their family in guiding plan development
- b.** ensure that the plan focuses on the individual's wishes and goals for themselves
- c.** provide information for individuals and families to help them to understand the process involved in completing a plan and provide an outline of the elements that need to be included
- d.** encourage support network involvement to brainstorm individualized options

5.4 Analysts and facilitators need to work together to provide the personalised supports that are reflected in the plan. Analysts must strive to implement approved funding as requested and tailor supports accordingly. Facilitators support plan implementation by assisting with accessing generic services and informal supports and by supporting individuals and families to gain information about options in their community. Facilitators and analysts also work together when needed for accessing, planning, and problem solving with CLBC funded service providers.

5.5 In addition to the above practice considerations, facilitators and analysts need to:

- a.** acknowledge and respect First Nations cultural traditions and community relationships
- b.** work in ways that support the inclusion of individuals in their community
- c.** respect privacy and confidentiality considerations
- d.** respect diversity and respond in ways that address potential barriers to accessing equitable service. This might include:
 - i.** use of a translator or staff member with a similar cultural background
 - ii.** collaborating with people with appropriate cultural or religious affiliations
- e.** honour how individuals and families define what is important for them to lead a good life in the community

6. REFERENCES

CLBC Community Supports Policy
CLBC Facilitator and Analyst Practice Guide (2009)
CLBC Service Provision by Family Members Policy
CLBC Vision, Mission and Values
CLBC Waitlist Policy
Developing an Individual Support Plan
Discovery Goal-Based Planning Guidebook