

A guide to **Individual Preference**



COMMUNITY LIVING
BRITISH COLUMBIA

Some people want to actively participate in choosing a service provider to deliver approved CLBC-funded services for themselves or a family member.

CLBC welcomes your participation – we call this individual preference. This guide describes how it works.

It is designed to supplement the more general Information for Families on Individual Preference.

A CLBC facilitator can explain this process further, and help guide and support you through it.



What is individual preference about?

Once you have been approved for a certain level and type of CLBC-funded services, individual preference is a way for you to express your choice about which person or agency provides those services.

It is part of what CLBC calls the procurement and contracting process.

The procurement and contracting process has certain principles that affect and limit how individual preference works:

- Services are responsive to the needs and choices of each individual and family.
- People with similar disability-related needs receive similar levels of funding.
- Service providers are willing and able to provide services effectively and safely.
- Service providers have access to clear information about contract opportunities, processes and results.
- The process is not affected by real or perceived conflict of interest.
- Personal information of eligible individuals and service providers is kept confidential.
- CLBC receives value for public funding it spends – things such as quality, reliability, continuity and cost are all considered in decisions about how services are provided.
- Where it is reasonable and practical, there is a competitive process - allowing different service providers to respond to contract opportunities.
- The process follows applicable laws and regulations and the highest ethical standards.



Is individual preference for me?

It is important to understand and accept the principles listed on the previous page before entering into individual preference. If these limitations don't work for you, then individual preference is probably not a good idea. You may want to talk to your facilitator about individualized funding, or setting up a person-centred society (also called a microboard) – these options work better for people who want more direct control and responsibility for managing funded services.

How does individual preference work?

There are two options. This guide explains the steps involved in each one. Your facilitator can help you decide which option works better for you, and then guide and support you through the process.

Option 1: Known Preference

CLBC works with your preferred service provider to make sure they are willing and able to provide the required services, within the approved funding. CLBC also works with you to help you make an informed choice. Here's how it works:

- 1)** You tell CLBC which service provider you prefer and why. You meet with the CLBC facilitator to explain your choice and walk through how the process will work. If your preferred service provider is not already a CLBC-approved service provider, there may be some additional things that need to be done. Your facilitator will explain this.
- 2)** Based on understanding what is important to you about a service provider, CLBC gives you a list of other service providers in the same geographic area who might also be a good match. These are service providers who are already approved (pre-qualified) to deliver CLBC-funded services.
- 3)** You visit at least three service providers - including your preferred one - to see their programs and locations and talk with the staff. You can also talk with people who already use their services. The CLBC facilitator can set up these meetings and go with you if you want. He or she can also help you figure out questions to ask, and then review the information with you. This process is about finding out as much as you can about each service provider in relation to the support needs and preferences of the person who will be using the services.



- 4) You tell CLBC in writing which service provider you prefer and why. CLBC then negotiates a contract with your preferred service provider. We still have to make sure that the preferred service provider can deliver the services within the approved level of funding, and according to CLBC contract expectations. This is called a direct award because there is no competitive process among different service providers.
- 5) CLBC informs you of the result of this negotiation. If CLBC is not able to negotiate a contract, we will explain why and then discuss what to do next.

Option 2: No Known Preference

CLBC first works with you to find a good match from among existing approved service providers. If this does not work, we undertake a competitive procurement process. This process has rules designed to make sure it is fair and equitable for all service providers participating. Here's how Option 2 works:

- 1)** You tell CLBC what you are looking for in a service provider – things that are important to you and will help ensure the best match for the individual receiving the services.
- 2)** CLBC tells you about service providers who might work well. These are approved (pre-qualified) service providers that CLBC knows can provide the services.
- 3)** You visit at least three service providers to see their programs and locations and talk with their staff. You can also talk with people who already use their services. The CLBC facilitator can set up these meetings and go with you if you want. He or she can also help you figure out questions to ask, and then review the information with you. This process is about finding out as much as you can about each service provider in relation to the support needs and preferences of the person who will be using the services.
- 4)** If you now have a clear preference, you tell CLBC in writing, along with your reasons. CLBC then negotiates a contract with your preferred service provider. We still have to make sure that the preferred service provider can deliver the services within the approved level of funding, and according to CLBC contract expectations. This is called a direct award because there is no competitive process among different service providers.

- 5) If you do not have a clear preference, CLBC proceeds with a competitive process, with your participation. You are required to sign a Confidentiality and Non-Disclosure Agreement. This means you promise not to share information about the procurement process with anyone, and that you accept the result of the procurement process. These are important rules that help make the process fair to all potential service providers.
- 6) CLBC advertises the procurement opportunity, using a proposal letter or a request for proposals. This will include information you may have helped put together about the specific needs, values and preferences of the individual who will be receiving service. It also sets out the criteria that CLBC will use to evaluate each proposal. Service providers have a fixed time to respond with a proposal for how they will provide services.
- 7) Once the proposals come in, you have an opportunity to review the non-financial parts and give feedback to CLBC about how well the service providers match the needs of the individual to be served. If appropriate, as part of the feedback process, CLBC staff and you may visit each proponent who has met the mandatory criteria to see their programs and locations. If this is part of the process, CLBC will explain the process further.
- 8) CLBC evaluates the proposals, taking your feedback into account, and scores them according to the evaluation criteria. The highest-scoring service provider is offered the contract. CLBC communicates the result to you, and then negotiates a contract.

What if I don't like the result?

If the result is the selection of a service provider that you're not happy with, CLBC staff will meet with you to explain the reasons for the decision, and review the process. Sometimes the principles that govern procurement can limit whether you get everything that you want. If you are still not satisfied, you can file a formal complaint. Your facilitator can give you information about how to do this.

What do these words mean?

In your discussions with CLBC staff and service providers, you may run across some technical words you might not have heard before. Here are what some of these words mean. Feel free to ask your CLBC facilitator if you need more clarification.

Competitive Process

Formal process where multiple service providers submit a proposal about how they would provide certain services.

Direct Award

Negotiation and award of a contract without a competitive process. This is what usually happens when an individual and/or family has a clear preference for a particular service provider, and that service provider meets basic requirements to contract with CLBC.

Pre-Qualified Service Provider or Vendor

Service provider that has already been approved as meeting basic requirements to contract with CLBC.

Procurement

The process of acquiring goods or services needed by CLBC. This includes asking service providers for proposals, evaluating proposals and negotiating contracts.



Proponent

Individual, agency or company that submits, or intends to submit, a proposal in response to a procurement opportunity at CLBC. A proponent is 'preferred' if they score the highest according to the evaluation criteria. A proponent is 'successful' if CLBC is able to negotiate a contract with them.

Proposal Letter (PL)

Letter sent by CLBC to one or more pre-qualified service providers, requesting a proposal of how they would provide a specific service.

Request for Proposals (RFP)

Open competitive process where any service provider may respond. CLBC evaluates their proposals using criteria related to qualifications, quality of services to be delivered, and cost.

Request for Qualifications (RFQ)

Process designed to pre-qualify service providers interested in supplying services/goods in the future.

Contacting CLBC

To find the contact information for your local CLBC office, please visit www.communitylivingbc.ca and go to Your Community > Local CLBC Offices.

You can also contact CLBC toll free at 1-877-660-2522.

Community Living British Columbia

Airport Square – 7th Floor
1200 West 73rd Avenue
Vancouver, British Columbia
Canada V6P 6G5



If you have any questions or would like more information:



Please call our free number:
1-877-660-2522



Visit our website at:
www.communitylivingbc.ca

Stay connected with CLBC:



Find us on Facebook at:
www.facebook.com/CLBC.SelfAdvocates
www.facebook.com/CLBC.Families
www.facebook.com/StartwithHi



Follow us on Twitter:
[@CLBC_Connect](https://twitter.com/CLBC_Connect)