



Policy Number: SE4.030	Policy Section: Supports and Supports	Effective: June 1, 2009
Title: Individualized Funding Policy		Executive Sponsor: Directors, Regional Operations

1. PURPOSE

Individualized Funding (IF) provides self-directed payment options to individuals and families as an alternative to or in addition to contracted services. IF enables individuals and their families or representatives (agents) to use the funds allocated by CLBC to arrange and manage the supports and services they require to meet disability-related needs. CLBC offers two payment options for IF, Direct Funding and Host Agency Funding.

This policy describes Individualized Funding and how to request an Individualized Funding payment option. It also outlines the information that CLBC facilitators provide to individuals and families to assist them to choose the most suitable IF payment option.

2. DEFINITIONS

Agent: A person who acts on behalf of the individual in relation to a Direct Funding or Host Agency Funding Agreement. An individual can act as his/her own agent.

Catalogue of Services (COS): A listing of the types of supports funded by CLBC for individuals.

Contracted Services: Supports and services managed by CLBC and funded through contracts between CLBC and service providers.

CLBC Request for Service List: A report that identifies requests for service for individuals and their families.

Direct Funding: An Individualized Funding payment option whereby funds allocated by CLBC are paid to an individual or his/her agent for the purchase of individualized supports and services.

Host Agency: An agency that is approved by CLBC to administer Host Agency Funding agreements.

Host Agency Funding: An Individualized Funding payment option whereby funds allocated by CLBC for the purchase of individualized supports and services are paid by CLBC to a Host Agency selected by the individual and/or agent.

Individual: A person 19 years of age or older who is eligible for CLBC services, as described in the *Eligibility for CLBC Supports and Services Policy*.

Individual Support Plan: A document that includes information about goals and support requirements, and the funding and services identified to meet them, as outlined in the *Individual Support Planning Policy*.

Representation Agreement: A legal plan that states who an individual gives authority to if he/she needs assistance managing his/her affairs. A Representation Agreement can cover financial and legal matters and health and personal care matters.

3. POLICY

Individualized Funding (IF) enables individuals and families to create new, innovative service options that support individuals to live in inclusive communities. Through IF, CLBC provides flexible, person-centred, self-directed payment options that allow individuals and families to arrange and manage the supports and services they require to meet disability-related needs. IF is available through Direct Funding or Host Agency Funding payment options.

Individualized Funding is used to purchase supports and services for the individual as agreed to by the individual, agent and CLBC. The agent and/or Host Agency are responsible for ensuring that the supports and services purchased with these funds comply with CLBC policies and program standards. The agent or Host Agency employs or contracts directly with, all support workers or caregivers. Agents or Host Agencies cannot sub-contract with an agency or organization to hire support workers on their behalf.

IF is available for new supports or services or as an alternative to existing contracted services. IF cannot be used to purchase spaces in or to expand existing group programs that are already paid for by CLBC. Individuals and families can select a combination of options including Direct Funding, Host Agency Funding and/or contracted services. Host Agency Funding is only available as a payment option when the request for CLBC funded supports is over \$6,000.00 per year. Individuals and families who receive Direct Funding or Host Agency Funding can request a change to contracted services or the other IF payment option.

The amount of Individualized Funding allocated to an individual by CLBC is based on the individual's disability-related needs, the estimated cost of the needed supports, and CLBC's financial resources. The types of supports and services funded by CLBC are described in the *Catalogue of Services*. When CLBC does not have funding available, requests for new or increased Individualized Funding will be managed and prioritized in accordance with the *CLBC Request for Service Policy*.

4. PROCEDURES

4.1 Individuals and families who are interested in learning about or requesting Individualized Funding contact a CLBC Community Living Centre. A CLBC facilitator will provide information to the individual and family about IF to assist them in deciding which IF payment option will best meet their needs.

4.2 Requests for services to be funded through Individualized Funding are managed and prioritized in the same way as all other requests for CLBC funded supports and services as outlined in the *Individual Support Planning Policy* and the *Request for Service Policy*. When an Individual Support Plan is required

the plan must be developed with the assistance of a CLBC facilitator and needs to indicate the IF payment option selected by the individual and family.

4.3 The types and amount of supports and services available to individuals and families through IF are consistent with what other individuals with similar levels of disability-related needs receive based on the *Catalogue of Services*. CLBC does not provide funds for supports or services that fall under the mandate of other government bodies or programs such as health services or income assistance.

4.4 Facilitators ensure that individuals and families interested in Direct Funding understand that the agent for the individual may be responsible for assuming the financial, managerial, administrative and legal responsibilities associated with being an employer as outlined in the *Direct Funding Policy*.

4.5 Facilitators inform individuals and families who express an interest in Direct Funding of more than \$6,000.00 per year that their agent must be able to:

- a) demonstrate his/her ability to fulfill the responsibilities of an agent including the ability to arrange and manage the individual's supports and services
- b) confirm his/her financial eligibility including completion of a credit check by CLBC for funding amounts of over \$25,000.00 per year
- c) submit a Representation Agreement or other documentation to show that they can legally act on behalf of the individual prior to the approval of Direct Funding requests over \$6,000.00 per year. Individuals or families requesting information about Representation Agreements can be directed to the Nidus Personal Planning Resource Centre and Registry. (www.nidus.ca).

5. PRACTICE

5.1 Facilitators play an important role in helping individuals and families explore how they can use Individualized Funding to develop innovative and creative person-centred support options that assist individuals to achieve their goals and dreams.

6. REFERENCES

Catalogue of Services
Direct Funding Policy
Direct Funding Procedures Guide for Facilitators and Analysts
Eligibility for CLBC Supports and Services Policy
Host Agency Funding Policy
Host Agency Funding Procedures Guide for Facilitators and Analysts
Individual Support Planning Policy
Individualized Funding Fact Sheet
Nidus Personal Planning Resource Centre and Registry (www.nidus.ca)
Request for Service Policy