



COMMUNITY LIVING
BRITISH COLUMBIA

Policy Number: SE4.191	Policy Section: Supports and Services	Effective: March 26, 2008 Amended: November 24, 2016
Title: Individual Support Planning Policy		Executive Sponsor: Vice President, Regional Operations

1. PURPOSE

CLBC offers a range of funding and planning options that promote choice, flexibility and community inclusion. This policy provides direction for CLBC staff about one of five components of resource allocation – supporting individuals/youth and their families to develop individual support plans. These plans identify needs, strengths and goals, and may also outline unfunded supports and/or requests for CLBC-funded supports and services that are linked to those needs, strengths and goals.

This policy outlines content required in individual support plans, and explains when plans are required for CLBC-funded supports and services. It applies to plans developed by individuals/youth and their families, whether on their own, with the support of others, or with the support of a CLBC facilitator.

2. DEFINITIONS

Guide to Support Allocation (GSA): An electronic tool in PARIS used by CLBC to determine an individual's current disability-related need.

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 an individual's goals and support requirements, and the funding and services identified to meet them.

Individualized Funding (IF): A self-directed service option as described in the *Individualized Funding Policy*.

Planning Registry: A report that lists requests for service for individuals and youth that are not currently needed but are required in the future.

Request for Service List (RFSL): A report that identifies current requests for service from individuals and/or their families.

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 16 years of age or over, but under the age of 19.

3. POLICY

- 3.1 Individual support plans can be developed by an individual or a youth on their own; with their family, support network, friend or trusted advisor; or with the support of CLBC.
- 3.2 CLBC can help with the development of an individual support plan when CLBC-funded supports are requested or to change existing funded supports to reflect changing goals or circumstances. CLBC can also provide assistance with planning access to services available to everyone in the community and informal community supports.
- 3.3 Written plans should reflect the request from the individual/youth and family. When a specific service is requested, planning and documentation should focus on how that service addresses the individual's aspirations, needs and wants, strengths and assets, and goals. Plans that include more than one request to address complex situations should include content and information to reflect the complexity of the requests.
- 3.4 When written plans are needed for CLBC-funded services they must:
 - Include a brief description of the individual/youth focussing on 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, as well as CLBC-funded services
 - Include information gathered in the resource allocation process that links disability-related needs, the individuals' goals, and the supports and services requested to achieve the goals
 - Outline how goal achievement will be evaluated
- 3.5 Written plans are needed to receive CLBC-funded services when:
 - The combined services to be provided 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 ongoing. When this occurs, plans are to be completed within four months of when the support was put in place. In exceptional circumstances, emergency funding may be extended by the Director of Regional Operations for a maximum of a further three months
 - There is a request on the Request for Service List (RFSL) or on the Planning Registry, in excess of \$6,000 per year, which 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 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

3.6 Plans are not needed to receive CLBC-funded services when:

- An acute, critical situation emerges that requires immediate, emergency funding
- Support requests are being identified for Planning Registry purposes
- Small amounts of service such as respite, 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, skill development

4. PROCEDURES

4.1 Facilitators provide information to individuals/youth 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 the *Self Advocate Workbook: My Plan* should be provided as resource material.

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

4.3 Individual support plans may be completed in a range of formats. They must include information on the elements listed below. All plans include a clearly defined request for service based on these key elements.

- 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/youth was involved in the plan development.
- Personal Profile:** A brief description of the individual/youth that outlines unique characteristics that others consider important to know in order to support him or her. Disability-related needs are detailed in the Guide to Support Allocation (GSA) Report and should not be repeated in the plan.
- Type and Cost of Supports:** A description of the requested CLBC-funded supports that are tailored to different aspects of the individual/youth's life and goals, and consistent with disability-related needs; how disability-related needs have been met in the past; and other sources of funding
- Access to Generic support:** The role of informal community supports and generic services, and how the support network assists in supporting the individual/youth.

- e) **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.
- f) **Safeguards:** A description of the intentional approaches taken or required to support the individual/youth safely.
- g) **Evaluation:** A description of how success will be measured.
- h) **Additional Information:** Any additional information needed to support the plan.
- i) **Contact Information:** Information on how to contact the person who is the primary point of communication about the plan.

4.4 When developing plans, facilitators provide information and guidance to individuals/youth and/or their families about person-centred services and practice approaches that support CLBC's Vision, Mission and Values. Facilitators assist with development of requests for funded supports based on the level of disability-related need as determined by the GSA.

4.5 Analysts can provide information on potential service providers, budget, and RFSL information that can guide plan development. Individuals and families can also provide useful information about potential service providers or recruitment strategies.

4.6 When funds become available to provide all or some of the service requested in a plan, the individual/youth, family, support network, facilitator and analyst involved work together to implement the service. This may involve adapting or adjusting the plan to reflect partial service implementation or changing circumstances.

5. DOCUMENTATION

5.1 Facilitators save completed individual support plans into Sharepoint.

6. PRACTICE

6.1 Planning begins with the first conversation with an individual and family. Developing a written plan usually begins after required information has been collected to complete the GSA and the scope of the request is known. Information gathered in the resource allocation process is helpful for providing a link between disability-related needs and the individual's goals and the supports and services requested.

6.2 Each written plan should be unique and reflect the aspirations, needs and wants, strengths and assets, and goals of each individual/youth. The content and amount of information that goes into a plan should be consistent with the complexity of what the individual is requesting.

6.3 When collaborating with individuals, youth and families to create a plan, it is important for facilitators to:

- a) Acknowledge the expertise, strengths and abilities of the individual/youth and their family in guiding plan development

- b) Ensure that the plan focuses on the individual/youth's wishes and goals for him or herself
- c) Provide information to individuals, youth and families to help them understand the process involved in completing a plan and the type and amount of services that can be funded by CLBC based on disability-related needs
- d) Provide an outline of the elements that need to be included in the plan
- e) Encourage support network involvement to brainstorm individualized options

6.4 Analysts and facilitators need to collaborate to provide the personalised supports that are reflected in the plan, and to ensure that the services provided are congruent with the needs, goals and strengths in that plan. Analysts are expected to implement approved funding as requested and tailor supports accordingly, and when needed, access, plan and problem-solve with CLBC-funded service providers.

6.5 Facilitators support planning and plan implementation by assisting with accessing generic services and informal supports, and by providing information about options in their community.

6.6 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, youth and families define what is important for them to lead a good life in the community

7. REFERENCES

CLBC Vision, Mission and Values
 Individualized Funding Policy
 Information for Families about Getting CLBC Services
 Information for Families Requesting CLBC Services
 Information for Families – Planning
 Resource Allocation: A Practice Guide for Facilitators
 Resource Allocation Policy
 Request for Service Policy
 Self Advocate Workbook: My Plan
 Service Provision by Family Members Policy