



COMMUNITY LIVING  
BRITISH COLUMBIA



# COMMUNITY LIVING BRITISH COLUMBIA

## Guide to Individualized Funding

*Supporting Choice and Innovation*

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## GLOSSARY OF TERMS USED IN THIS GUIDE

**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 their own agent.

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

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

**Direct Funding Simplified Agreement:** A funding agreement between the individual or their agent and CLBC for funds of less than \$10,000.00 annually.

**Direct Funding Standard Agreement:** A funding agreement between the individual or their agent and CLBC for funds of more than \$10,000.00 annually.

**Disability-related Needs:** The needs related to an individual's developmental disability that impact their ability to communicate, meet their own personal care needs, create or maintain relationships, make day-to-day decisions, make important life decisions, stay safe from harm, participate in work and learning opportunities and participate in their community.

**Disability Tax Credit Certificate:** A form completed by an individual, certified by a qualified medical practitioner, and approved by the Canada Revenue Agency that provides a non-refundable tax credit for an individual who has severe and prolonged impairment in physical or mental functions. This tax credit can be used to reduce the amount of income tax payable by the individual.

**Host Agency:** An agency that is approved by CLBC to manage 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.

**Host Agency Funding Agreement:** A funding agreement between CLBC and a Host Agency.

**Host Agency and Agent Support Agreement:** An agreement between an individual, their agent and a Host Agency.

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

**Individual Support Agreement:** An agreement between an individual, their agent and CLBC in a Host Agency Funding arrangement.

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

**Personal Summary:** A document created by a youth or adult and their family, with support from others as needed, that helps CLBC and other planning partners get to know who the person is, what is important to and for them and, where relevant, their support requirements. It can help CLBC and others with planning, and with gathering information to complete assessment documents required to request support and/or funding through CLBC. The individual and/or family's own this document.

**Records:** The written information that needs to be kept by the agent showing the Direct Funding money they get and how it is spent including all of the information about payments and deductions for any employees, bank statements, and all bills (invoices) and receipts.

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

**Supports Funded by Community Living BC:** The services funded by CLBC as well as associated parameters that relate to disability-related needs and the amount of service that can be provided.

## WELCOME

### About This Guide

Community Living British Columbia (CLBC) wrote this guide to help you understand Individualized Funding. We hope this guide is helpful to self-advocates, their family members, support networks, and friends. In this guide, we will use IF to stand for Individualized Funding.

This guide explains how you can use IF to help you get the supports and services that work for you. This guide has five different parts.

- Part 1 tells you about IF
- Part 2 talks about how you can use this funding
- Part 3 explains how you or the person helping you can get the money directly through Direct Funding to pay for your services
- Part 4 tells you how you can use a service provider as a Host Agency to help you manage the money
- Part 5 talks about what to do if you want to use IF

The first time you see some words in this guide there will be a \* beside them. This tells you that you can learn more about what this word means by looking in the Glossary at the start of the guide.

## INDIVIDUALIZED FUNDING

### What is IF?

IF lets you or the person helping you (your Agent\*) use money given to you by CLBC to create new, different kinds of services that will support you in your community. IF provides new ways to pay for the supports you need. It also helps you get and manage the supports and services that will meet your disability-related needs. IF gives you more say over the decisions that affect your life. You can choose who you work with and when and how you get your supports.

You can get IF in two different ways:

1. Direct Funding: Money to buy supports and services for you are paid directly to you or your Agent.
2. Host Agency Funding: Money to buy supports and services designed for you are paid by CLBC to a Host Agency\* that you or your Agent choose.

### Who is IF for?

If CLBC has said “yes” to your request for funding for services, you can use IF to create a new way to get your service and you want more choices about how you get your supports.

### **Who can ask for IF?**

Anyone 19 years of age or older who is eligible for CLBC services.

### **What is different about IF?**

IF lets you choose and pay for the supports you need to meet your disability-related needs. It also gives you more say in how and when your supports are provided. You may need some help from your family or support network as well as a CLBC facilitator to make these arrangements.

### **Do I need to change to IF?**

Changing to IF is your choice. If you are happy with the supports you get now, you do not have to change to IF.

### **How do I change to IF when I already get services through a CLBC-funded service provider?**

Talk to a facilitator at your local CLBC office. A CLBC facilitator will explain how CLBC manages and prioritizes requests for funding and next steps and will work with you and a quality service analyst (analyst) about the possibility of moving your funding to IF. The facilitator will ask you (or help you if needed) to review and update your Personal Summary\* to support your request to change to IF. An analyst will review your request and determine the amount of funding you can receive.

### **What is a Personal Summary?**

A Personal Summary is something that tells CLBC about:

- Your strengths
- What is important to and for you
- What you need help with, and
- Other information that helps CLBC understand how best to support you.

You can create a Personal Summary to share with your CLBC facilitator as one way to get to know each other and start planning together. You can also create one together with your CLBC facilitator. You can update or change it at any time. You are the owner of this document.

There are different ways to get help to create a Personal Summary, such as:

- Attend the Welcome Workshop series
- Get help from your CLBC facilitator, or
- Use the Family Support Institute's My Booklet at [findsupportbc.com](http://findsupportbc.com).

If you ask for IF, you will need to give your CLBC facilitator a copy of your Personal Summary. A Personal Summary is **required** when you request CLBC-funded services except when you are requesting employment services or minimum service.

CLBC's [Support and Planning Policy](#) and the *Information for Families: Planning Factsheet* gives you more information about when you need to complete a Personal Summary. You can get a copy of the policy and the factsheet at your local CLBC office or on the CLBC website at [www.communitylivingbc.ca](http://www.communitylivingbc.ca).

### **How much money can I get from CLBC for IF?**

The amount of money that CLBC gives you is based on:

- Your disability-related needs
- How much the supports you need to meet your needs will likely cost, and
- The amount of money CLBC has available.

An analyst will let you know how much funding is approved.

### **What types and amount of support can I get through IF?**

The types and amount of support and service that you can get through IF is similar to what other individuals who have the same level of disability-related needs as you receive. The *Supports Funded by Community Living BC* document and CLBC's website describe the types of services CLBC can fund.

### **How does IF work?**

First you and CLBC must agree on the amount of money for the supports that you are asking for. Then, when your request is approved and the money is available a CLBC facilitator will work with you to decide on the best arrangement for paying for those supports and services.

### **What happens if CLBC does not have the money to give me for IF?**

When CLBC does not have enough money for the services that individuals ask for they have to make tough decisions about who needs the services first. CLBC will look at your request for services to be paid for through IF in the same way they look at all requests for CLBC -funded services. You may get part of what you ask for and/or your requests may be placed on the local CLBC Request For Service List. The CLBC [Request for Service Policy](#) and the *Information for Families: Getting CLBC Funded Services* explains how CLBC manages requests for services or funding when money is not available.

### **What if my needs change?**

Call your local CLBC office to let them know what is happening and how your needs have changed. A CLBC facilitator will ask you (or can help you if needed) to update your Personal Summary and you may decide to do more planning with your facilitator or with an independent planner to address the changes you are experiencing. You will need to update your Personal Summary if you decide to make a new request for services.

**Note:** Your plan is not referring to your Personal Summary. As outlined in the CLBC *Support and Planning Policy*, you can provide CLBC with a copy of your plan, if you have one, in addition to submitting your Personal Summary when requesting CLBC-funded services.



## OBTAINING SUPPORTS THROUGH IF

### What supports can I buy with IF?

The *Supports Funded by Community Living BC* describes the types of supports that CLBC funds. Individuals and families can use IF for new, creative, person-centred ways to get supports that fit within the types of supports described in the *C Supports Funded by Community Living BC*. IF cannot be used to buy spaces in or to make existing group programs bigger that are already paid for by CLBC.

IF can be used to buy supports within the following program areas as talked about in *Supports Funded by Community Living BC*:

- a) **Supports to Live in My Home:** Supports to help people live in their homes. For example, Independent Living support for a person to live in their own apartment.
- b) **Supports to Participate in My Community:** Supports for individuals that allow them to join in activities in their community and to learn new skills. For example, time limited support to get a paid job or to volunteer in the community.
- c) **Support for My and My Family's Well-being:** Supports to strengthen the individual and family's ability to thrive. For example, Self-Directed Individual and Family Wellness.

### Can I use the money to pay for any other costs?

You can use IF to cover the following costs:

- Costs for your support workers to join in your activities with you such as bus fare or entrance fees, and
- Bookkeeping, banking fees, and other costs associated with hiring people.

### Who will set up my supports?

With IF, you can arrange and manage your own supports. You or the person helping you might hire people directly to help you. You may also work with a Host Agency that will help choose and hire people to support you. You can hire people you know to help you. A CLBC facilitator may be able to give you some names of people who provide support services in your neighbourhood.

### Can I hire a family member with the money?

You can pay some family members to provide support services (i.e., siblings, aunts and uncles, grandparents). You cannot hire your parents, children, or spouse except in special situations where an exception has been granted. You must explain the special situation when you are putting in a request for service (either in writing or in conversation with the CLBC facilitator) or in your plan, if you have one. Your request to hire your parents, children or spouse must then be approved by the CLBC Integrated Service Manager.

For more information please read CLBC's [Service Provision by Family Members Policy](#). You can get a copy of this policy at your local CLBC office or on the CLBC website.

### **Who will check to see if the supports that I buy are working for me?**

If you receive IF through Direct Funding you, your family or support network and your Agent will make sure the supports you buy are working well and helping you reach your goals.

If you receive IF through a Host Agency, the agency and you, your family or your support network and your Agent will make sure the supports you receive are working for you and are meeting your needs.

With both Direct Funding and Host Agency Funding, CLBC may ask for reports from you, your family and your Agent or Host Agency. The reports will let CLBC know if your supports are meeting CLBC's policies and the terms of your funding agreement and helping you meet your goals. More information about these reports can be found in the Direct Funding and Host Agency Funding sections of this guide.

### **What if I want to change the staff who work with me?**

Because you arrange your own supports, you can request a change at any time. If you receive IF through Direct Funding, you or your Agent may be the employer for the people who work with you. If you are the employer, then you must follow the rules set out in the *Employment Standards Act* when you change staff. You or your Agent also need to make sure that people who work for you have done their criminal record reviews and do not have a criminal charge that puts your health and safety at risk. Please read CLBC's [Criminal Record Check: Service Delivery Policy](#) for more information.

If you receive IF through a Host Agency you need to ask the agency to help you change your support worker(s).

### **What if I want to move to a different CLBC region?**

You can still receive supports in your new location if you stay in British Columbia. There are, however, many things that need to be worked out before you move such as finding new staff or a new Host Agency. First you must call your CLBC facilitator to let them know that you are planning to move. Your CLBC facilitator will work with you to help make sure your supports continue when you move.

## **DIRECT FUNDING**

### **What is Direct Funding?**

Direct Funding is how CLBC gives money directly to you or your Agent (the person acting on your behalf) to buy the supports that have been agreed to in your funding agreement. The money is given to you each month. You or your Agent will manage the money and hire and organize your support workers. You or your Agent will pay your employees or contractors and report to CLBC about how you spend the money.

### **Can I get Direct Funding?**

You can get Direct Funding if CLBC has said you are eligible for supports and able to manage the money and responsibilities of Direct Funding. You do not have to be able to manage by

yourself, but the person you choose to help you must be able to show CLBC that they can manage the responsibilities.

### **Are there different rules for different amounts of money?**

There are different rules depending on how much you ask for.

- If you are asking for more than \$10,000 in a 12-month period, this is called Direct Funding Standard.
- If you are asking for \$10,000 or less in a 12-month period, this is called Direct Funding Simplified.

### **What are the rules for becoming an Agent for Direct Funding Simplified?**

A CLBC facilitator will help you (or the person acting on your behalf) understand the rules for becoming an Agent for Direct Funding Simplified. For Direct Funding Simplified, the Agent (you or the person acting on your behalf) must understand that they will be responsible for:

- Arranging the supports you need
- Managing the money given to you by CLBC
- Making sure criminal record reviews are done for staff or caregivers that are hired to support you
- Paying your support workers and taking on the legal responsibilities of an employer, and
- Showing CLBC how you spent the money that they gave you.

The Agent (you or the person acting on your behalf) must live in the province of British Columbia.

You or the person who is hiring staff must set up an account with the Ministry of Public Safety and Solicitor's Criminal Records Review Program to get criminal record reviews done to make sure the staff are not a risk to your health and safety. The Criminal Records Review Program is responsible for doing the reviews and requires that the person setting up the account to live in British Columbia.

### **What are the rules for becoming an agent for Direct Funding Standard?**

A CLBC facilitator will help you (or the person acting on your behalf) understand the rules for becoming an agent for Direct Funding Standard.

For Direct Funding Standard, the Agent (you or the person acting on your behalf) must:

- a) Complete an application and be approved as an Agent
- b) Allow CLBC to complete a credit check if the funding will be more than \$25,000.00 over a 12-month period
- c) Make sure that you have a Disability Tax Credit Certificate
- d) Show that they are able to take on the legal responsibilities of an employer  
Be able to legally act on your behalf through a Representation Agreement or other authority
- e) Set up an account with the Ministry of Public Safety and Solicitor's Criminal Records Review Program to get criminal record reviews done on staff or caregivers that you work with, and
- f) Live in the province of British Columbia

A CLBC analyst will review the information you and your Agent provide before a decision can be made to provide Direct Funding of more than \$10, 000 in a 12-month period.

### **Do I need a Representation Agreement\*?**

You must complete a Representation Agreement **only** if you are asking for Direct Funding of more than \$10, 000 in a 12-month period and you have chosen someone to be your Agent. This agreement will show that you agree that it is okay for the person you have chosen as your Agent to act on your behalf, to:

- Help you make plans,
- Set up your supports, and
- Spend your Direct Funding money.

A Representation Agreement is a legal document that is covered under the *Representation Act*. It lets you name someone to help you make day-to-day decisions related to your health, personal care, and money. A Representation Agreement does not take away any of your rights.

For Direct Funding Standard, you need the type of Representation Agreement that is called a 'Section 7' agreement. This type of agreement is not hard to complete, and you do not need a lawyer to help you.

A CLBC facilitator can give you information about where to learn more about Representation Agreements. You can also call the Nidus Personal Planning Resource Centre. Nidus gives information and tools to help people write Representation Agreements.

More information can be found on their website at [www.Nidus.ca](http://www.Nidus.ca).

### **What do I need to think about before I choose Direct Funding?**

- The disability-related needs that you need CLBC-funded support for
- Do you or your family or Agent want to be the employer of the people who work with you?
- The supports you will use Direct Funding to get and how you will set them up
- Where you can get help if you need it
- How you plan to respond to emergencies
- The information you will need to give to CLBC about how the money is spent
- Any rules attached to Direct Funding that you must follow
- When and how Direct Funding could be stopped if you cannot do what you need to for CLBC and/or your employees or contractors
- How you will find and manage support staff, ensuring they share your values and meet qualifications ( e.g., criminal background checks, First Aid training, etc.).

### **What do I have to do if I choose Direct Funding?**

You or your Agent will have to:

- Manage the money given to you by CLBC
- Put in place the supports you need
- Make sure criminal record reviews for your support workers are done before they start

working

- Pay your support workers, and
- Show CLBC how you spent the money that they gave you.

To get Direct Funding, you or your Agent needs to sign a Direct Funding agreement with CLBC. This Direct Funding agreement says how much money you will get and what supports you can buy with the money. It also says what records\* you need to keep and how you will tell CLBC about what you have spent.

You or your Agent need to work within the amount of money stated in your Direct Funding agreement. If you spend more money than CLBC gives you, your Agent will need to pay the extra costs with their own money.

### **Will I need to set up my banking differently?**

If you get Direct Funding of more than \$10, 000 in a 12-month period, you or your Agent must open a bank account just for the Direct Funding money. All the money you get from CLBC and all the supports you pay for must go through this bank account. Having this bank account just for Direct Funding will help you manage the money you get. It will also help you track and report on how you spend the money.

If you get Direct Funding of less than \$10, 000 in a 12-month period, you do not need to open a new bank account. You or your Agent can set up your banking in the way that works best for you.

### **Do I need to keep records about the money?**

You will need to keep records about the money you get and how you spend it for both Direct Funding Standard and Direct Funding Simplified agreements. You will need to keep all invoices and receipts so that you can show CLBC what the money was spent on. You will only need to give CLBC copies of these records, invoices, and receipts if CLBC chooses to check on how you spent the money you got for Direct Funding.

You will also need to keep records of the people you hire so that government agencies like the Canada Revenue Agency, BC Employment Standards Branch and WorkSafe BC can be sure that you have paid the right amounts to them and made the right deductions.

### **Will I need to send anything to CLBC to let them know how I spend the money I get?**

You **must** send reports to CLBC to let them know that you are spending the money as agreed to in your Direct Funding agreement. If you do not report to CLBC as needed, your Direct Funding may be stopped. How often you report and what you report is based on how much money you get:

- **Direct Funding Standard (more than \$10, 000 in a 12-month period):**  
Financial Reports must be sent every month to CLBC showing all the money going into and out of the bank account. The Financial Report is sent to CLBC using an electronic (web-based) form on the computer.

- **Direct Funding Simplified (less than \$10,000 in a 12-month period):**  
Compliance Reports must be sent to CLBC every six months. You are encouraged to do this using an electronic form on the computer. If you do not have internet, you can use a paper form. You must state on this form that you have followed the rules of your Direct Funding Simplified agreement \*.

### **Will I take on any legal responsibilities of an employer?**

If you use the money to pay support workers who are considered by the government to be employees or workers (as discussed above), you will have the legal responsibilities of an employer. This means that when you pay your support worker or a caregiver you will have to make deductions and adjustments for:

- Income tax
- Statutory holidays
- Workers Compensation premiums
- Employment Insurance
- Canada Pension Plan, and
- Other government financial requirements.

The legal responsibilities of an employer apply to both Direct Funding Standard and Direct Funding Simplified Agreements.

You can hire a bookkeeper or payroll company to help but you or your Agent are responsible for making sure these responsibilities are met. You or your Agent will also need to understand the legal rights of employees as outlined in the *Employment Standards Act*.

If you think that it will be hard to meet these responsibilities or that it will take a lot of time, you can choose instead to work with a Host Agency. Your Host Agency will take on these employer responsibilities for you.

### **How will I know if the support workers I hire are employees or contractors?**

There is a legal difference between being an employee/worker or a contractor. The Canada Revenue Agency, BC Employment Standards Branch and WorkSafe BC each have specific definitions that they use to determine whether someone is an employee/worker or a contractor.

These definitions are not all the same, so it is important that you work with each of these agencies to get their advice and assistance for your specific situation. You can find the contact information for these agencies in Appendix A of this guide.

### **What happens if CLBC wants to check on how I spend the money they have given me?**

Every year, CLBC chooses a number of individuals to check on how they spent the money they got for Direct Funding. This is called an "audit". If CLBC chooses you for audit, you will be asked to send copies of all your records, invoices, and receipts for the months that they tell you. CLBC will look at how you have spent the money. If you have paid for things that were not agreed to in your Direct Funding agreement, CLBC may ask you to pay money back to them. You may also be asked to pay back any money that you have not spent and do not plan to spend.

### **Can I change how I spend my Direct Funding?**

You decide how you spend the funds but you must buy the supports and services that you agreed to with CLBC. If you want to make changes to what supports you can buy, please call your local CLBC office and speak to your CLBC facilitator.

### **Do I need insurance?**

You must make sure that you have set up workers compensation coverage through WorkSafe BC, where required. If you employ staff, you will be required to register with WorkSafe BC as an employer and arrange coverage for your workers. If the people working for you are contractors, you should contact WorkSafe BC to ensure that your contractors have set up their own coverage. As discussed above, it is important that you check with the appropriate government agency so that you know for sure whether the people working for you are employers or contractors.

CLBC will enroll you in an insurance policy that provides liability protection for you or your Agent and your employees and contractors. This insurance only covers activities carried out under the Direct Funding agreement.

As with all insurance, there are limitations, exclusions, and conditions. You will get a copy of the insurance policy from the insurance broker after CLBC registers you for the insurance. If you want to see a copy of the policy before you sign the agreement you can ask your facilitator to get one for you.

### **Does Direct Funding make a difference to other money I get from government or to the tax I pay to the government?**

If you receive more than \$10,000 in a 12-month period through a *Direct Funding Standard Agreement* you must be able to show CLBC that you currently have approval from the Canada Revenue Agency to claim the Disability Tax Credit. As well as reducing the amount of income tax you need to pay, being able to claim the Disability Tax Credit also reduces the possibility that receiving Direct Funding will affect other government benefits you may receive.

To be eligible to claim the Disability Tax Credit you or your family member or representative needs to complete a Disability Tax Credit Certificate and then have your doctor or other qualified person (there is a list on the form) certify it. Once this is done, you send the certificate to the Canada Revenue Agency for approval. The Canada Revenue Agency will send you a letter letting you know if you are eligible to claim the Disability Tax Credit.

The Disability Tax Credit Certificate form can be found at the Canada Revenue Agency website at: <https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t2201.html> .

CLBC staff cannot answer tax-related questions. Taxation is a complex issue and You may wish to talk to a taxation professional if you have questions or concerns.

### **What happens if I get into difficulties with Direct Funding?**

Contact your CLBC facilitator at your local CLBC office immediately.

### **When could I be asked to pay back money?**

CLBC could ask you to pay back money if you spend money on things that were not agreed to in your agreement. You could also be asked to pay back money if you did not use all the money that you were given.

### **What If I no longer want to get Direct Funding?**

Call your CLBC facilitator to talk about how you can get your supports in a different way.

## **HOST AGENCY FUNDING**

### **What is a Host Agency?**

A Host Agency is an agency that CLBC has approved to manage the money given to individuals by CLBC through Host Agency Funding.

### **What does a Host Agency do?**

A Host Agency manages the money you get from CLBC for you and helps you set up and manage the supports you need. If you use a Host Agency, you still have a say in who works with you and what they do for you, but the Host Agency takes on the job of being the employer or contracting with support workers. The Host Agency makes sure that all the responsibilities of being an employer or contracting workers are met. You have less responsibility for paperwork and recordkeeping than Direct Funding. You can choose to use Host Agency Funding **only** if the money you will get from CLBC for your supports is more than \$6,600 in a 12-month period.

### **Where can I find a Host Agency?**

Your CLBC facilitator can give you the names of Host Agencies in your community that CLBC has approved.

### **How do I choose a Host Agency?**

To choose the Host Agency that can best meet your needs, we suggest that you always talk to more than one Host Agency. In addition to managing fundings on your behalf, Host Agencies can support you in different ways. Some will help you coordinate your services while others can deliver some services to you. It is important to find out how a Host Agency supports people with IF. In addition to finding out about the organization's mission and values, asking the following questions can help you make your choice:

- How does your agency do person-centred planning? How often is it done?
- What supports can I get? Do they fit what I want?
- Can the agency help me reach my goals?
- Can I choose the person who will support me?
- Will I have the same person support me on a regular basis?
- What if the regular person is sick or on holiday?
- Can I call someone from the agency at all times?
- What after-hours emergency support is available?
- Who do I talk to if I'm happy or unhappy with my supports?
- Who will talk to me to find out if my supports are working for me?
- What happens if I want to stop the supports?



- How does the agency find good staff? What training are they given?
- How often will I receive reports on how much I have been spending? What is included in the reports?

It can be helpful to ask the agency for the names of other people who they work with who would be willing to tell you what they think about the agency.

When you have made your choice, you should ask your CLBC facilitator to include in your request for service the name of the Host Agency you would like to work with in addition to indicating that Host Agency Funding is your preferred IF option.

### **What is an Individual Support Agreement?**

An *Individual Support Agreement*\* is an agreement between you, your Agent (your family, support network or other person acting on your behalf) and CLBC. This agreement is based on the information in your Personal Summary and states what everyone who signs the agreement agrees to do. Your goals and how they will be delivered (the “deliverables”) are written in the *Schedule A – Support and Services* part of the *Individual Support Agreement*. *Schedule A– Support and Services* becomes an important part the *Host Agency Funding Agreement*\* that CLBC signs with the Host Agency you choose.

### **How does the Host Agency know what supports to set up for me?**

You and/or your Agent will sign a *Host Agency and Agent Support Agreement*\* with the Host Agency. This agreement states that the Host Agency will set up supports for you that will help you meet the goals described in the *Schedule A – Support and Services*. The agreement also states what responsibilities you or your Agent and the Host Agency agree to for arranging and managing your supports and services. Your Host Agency will work with you and your Agent to decide how they will set up the supports described in your *Schedule A – Supports and Services*. The *Host Agency and Agent Support Agreement* cannot be signed until your *Individual Support Agreement* and *Schedule A – Supports and Services* has been signed. The Host Agency must give a copy of the signed *Host Agency and Agent Support Agreement* to the local CLBC office.

### **How does the Host Agency get the money for my supports?**

The Host Agency signs a *Host Agency Funding Agreement* with CLBC. This agreement describes the amount of money the Host Agency will get to pay for your supports and when and how the money will be paid to them. This agreement also states the responsibilities that the Host Agency and CLBC agree to.

Your *Schedule A – Supports and Services* becomes part of the funding agreement. This makes sure the Host Agency knows your goals for each service you will get and how you want the services set up. The *Schedule A – Supports and Services* also describes how you and your Agent, CLBC and the Host Agency will know if the services are working for you. The *Host Agency Funding Agreement* is signed after CLBC has received a copy of your *Host Agency and Agent Support Agreement* from your Host Agency.

### **How do I know if my Host Agency has paid for my supports?**

You or your Agent will get reports from your Host Agency that tell you how much money they

received on your behalf and how they spent the money. The services that they bought with the money should fit with what was agreed to in your *Schedule A – Supports and Services*. It is important to read the reports when you get them to make sure that the Host Agency has only used the money to pay for your supports and that all the supports you have received have been paid for.

## **MOVING AHEAD WITH IF**

### **Which is better, Direct Funding or Host Agency Funding?**

If CLBC agrees that you or your Agent can manage Direct Funding, you can choose the type of funding, Direct or Host Agency, that best meets your needs. You can discuss with your CLBC facilitator any questions you might have about which option is better suited to meet your needs.

You may want to think about the following before you choose Direct Funding or Host Agency Funding:

- Do you or your family or support network member (Agent) want to be an employer?
- Do you understand all the rules that come with being an employer?
- Do you or your family or support network member (Agent) want to be responsible for making sure records for all of the people you hire and for everything you do with the money are kept and submitted to CLBC?

### **How do I start IF?**

Your first step is to call your local CLBC office. A facilitator will explain Direct Funding options and Host Agency Funding to you. They will also help you think about which choice is best for you. The CLBC facilitator can help you create a Personal Summary if one has not been completed and support you in putting in a request for service for Direct Funding or Host Agency Funding.

### **What if I want to change how I get IF once I'm receiving it?**

You should call your local CLBC office.

### **Where can I get more information about IF?**

Your local CLBC office can give you more information and may put you in touch with someone already receiving IF.

You can also get more information from Vela Canada at <https://www.velacanada.org/>. Vela helps individuals and families and/or their support network interested in IF and other ways to direct their own services.



## APPENDIX A: MORE SOURCES OF INFORMATION

### **Canada Revenue Agency**

Provides information about setting up a business number, taxation, and rules about employers and contractors.

Toll Free: 1-800-959-5525 <https://www.canada.ca/en/revenue-agency/services/e-services/e-services-businesses/business-account.html>

### **Community Living BC**

Phone: 604-664-0101 Toll Free: 1-877-660-2522

[www.communitylivingbc.ca](http://www.communitylivingbc.ca)

### **Ministry of Public Safety and Solicitor General's Criminal Record Review Program**

Provides information about the criminal record review process

Toll Free (in BC): 1-855-587-0185 Fax: 250-356-1889

<https://www2.gov.bc.ca/gov/content/safety/crime-prevention/criminal-record-check/online-service-information>

Email: [criminalrecords@gov.bc.ca](mailto:criminalrecords@gov.bc.ca)

### **Ministry of Labour**

Employment Standards Branch

Gives information about rules for employing people and rules about employers and contractors.

Toll Free (in B.C.): 1-800-663-3316 <https://www2.gov.bc.ca/gov/content/employment-business/employment-standards-advice/employment-standards>

### **Nidus Personal Planning Resource Centre and Registry**

Provides information about and help with Representation Agreements.

1440 W 12th Ave, Vancouver, B.C., V6H 1M8

Phone: 604-408-7414 Fax 604-801-5506

<http://www.nidus.ca/>

E-mail: [info@nidus.ca](mailto:info@nidus.ca)

### **WorkSafe BC**

Information about employer services and workers' insurance.

Inquiry regarding employer services

Phone: 604-244-6181 Toll Free: 1-888-922-2768

[www.worksafebc.com](http://www.worksafebc.com)

### **Vela**

Information about individualized services and assistance with becoming an employer.

1-5761 Glover Road, Langley, BC V3A 8M8

Phone: (604) 539-2488 Email: [info@velacanada.org](mailto:info@velacanada.org)

<https://www.velacanada.org/>