GUIDE TO

PERSON CENTRED SOCIETIES

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Policy Framework

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About this guide

This guide will help you understand:

- What a Person Centred Society is
- What kind of services a Person Centred Society can deliver to support a person eligible for CLBC, and
- Some of a Person Centred Society's responsibilities when delivering CLBC funded services.

It is intended to help self-advocates, family members, support networks, and friends to learn more about how a person eligible for CLBC services can be supported through a Person Centred Society.

The guide can be used together with the *Person Centred Societies Policy* and the *Managing the Money: Person Centred Society Guide,* which outlines specific responsibilities for a Person Centred Society's Board of Directors when they manage CLBC funding.

The guide should also be used with the *Cultural Safety Policy*, which outlines key principles of cultural safety, anti-racism, and trauma-informed care. It ensures that all services provided through a Person Centred Society are inclusive, equitable, and responsive to the unique cultural needs of Indigenous people and other diverse populations.

We will use PCS to stand for Person Centred Society throughout this document.

Introduction

A PCS is a small non-profit society with a Board of Directors that acts as a circle of support for a person. Together, this group can create services that are flexible, innovative and person centred, that help the person achieve self-determination and citizenship.

Person Centred Societies can exist without funding or with funding from different sources (for example, Ministry of Health, a trust, CLBC). For the purposes of this document, our focus is on Person Centred Societies that receive service funding from CLBC.

When adults who are eligible for CLBC, their families and/or support networks plan with CLBC they have a choice of how services are delivered, which can be through:

- A contracted service provider,
- Individualized Funding (IF), or
- A Person Centred Society.

A PCS with CLBC funding manages it directly by hiring or contracting support workers and other paid caregivers. Alternatively, a PCS can ask a CLBC-contracted provider to deliver the services and may work closely with them to ensure the services meet the person's unique and changing needs.

Person Centred Societies

What is a Person Centred Society?

A PCS is a group of three people or more who come together to form a Board of Directors to support a person with a disability throughout their life. The PCS must be registered with the BC Registries and Online Services and follow certain requirements. These requirements are outlined in the *BC Societies Act*. A PCS may or may not receive funding directly from CLBC.

What is a Microboard™?

A Microboard™[1] is a type of Person Centred Society developed in partnership with Vela Canada (Vela). It is a small group of committed family and friends (a minimum of five people[2]) who create a non-profit society (with a Board of Directors) to support a person with a disability. CLBC contracts with a Microboard in the same way as other Person Centred Societies but the Microboard follows Vela's Guiding Principles in addition to fulfilling CLBC's policy requirements.

Where can I find more information about Microboards?

Vela is a non-profit society British Columbia that helps people with disabilities take greater control of their lives by creating customized, inclusive, and creative supports through the development of a Microboard or Individualized Funding. You can find more information on Vela's website under the Microboards tab.

I am eligible for CLBC services. How do I know if a PCS is right for me?

Many people decide to form a PCS to help their loved one plan for their future and connect with their community. You may want to form a PCS if you have a few people that you would like to have involved in your life in a more formal way.

Can I have a PCS that does not manage my services?

Yes. Some Person Centred Societies do not receive funding from CLBC but are set up to offer you lifelong support. You can still receive services in other ways, such as through Individualized Funding or through a service provider that contracts directly with CLBC.

What happens if my PCS manages my services?

If your PCS manages your services, CLBC will set up a contract with your PCS Board of Directors. This contract identifies the:

[1] Microboard is trademarked using the ™ to indicate that it is the only type of PCS that is under Vela's umbrella of supports, and that a PCS using the term Microboard meets their requirements.
[2] The BC Societies Act requires a minimum of three directors on a PCS Board.

- Person who is being supported
- Amount of CLBC funding the PCS will receive
- Types of services that are being funded
- Term of the agreement (start and end dates), and
- Responsibilities of both parties (CLBC and the PCS Board of Directors).

How much money can I get from CLBC if a PCS manages and delivers my services?

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

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

An Analyst or Facilitator will let you know how much funding is approved.

What types and amount of support can I get through a PCS?

The types and amount of support and service that you can get through a PCS is similar to what other people 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 funds.

Setting up a Person Centred Society

What do I need to think about before choosing to form a Person Centred Society to manage my services?

- The goals of your PCS
- Who will be on your PCS Board, and what skills and connections they have
- Whether the people on your PCS will be able to commit to helping you in the long-term
- Whether you want help from Vela to set up a Microboard
- Any rules that a PCS will need to follow about being an employer
- The reporting and monitoring processes that a PCS must follow
- How the PCS will find and manage staff, and ensure that they share your values and meet qualifications

I have decided to form a Person Centred Society, what's next?

When you have decided that you would like to set up a PCS, gather a minimum of three people to be on your Person Centred Society's Board of Directors. Next, visit the BC Registries website to begin the process of setting up your PCS. You may also reach out to Vela to learn about setting up a Microboard, which is a type of PCS.

How can my PCS manage my services?

Talk to a Facilitator at your local CLBC office. They will explain how CLBC manages requests for funding and next steps. A Facilitator will also ask you for or help you to create or update your Personal Summary. Your Personal Summary will support your request for services to be managed through your PCS. Service planning should reflect your cultural identity and values, as outlined in the *Cultural Safety Policy*.

What is a Personal Summary?

A Personal Summary is something that tells CLBC about:

- Your strengths
- What is important to you and for you
- What you need help with (such as your support needs), and
- Other information that helps CLBC understand how to support you.

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

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

- Attend a Welcome Workshop
- Get help from your CLBC Facilitator, or
- Use the Family Support Institute's *My Booklet* at findsupportbc.com

If you want your PCS to manage your services, you will need to give CLBC a copy of your *Personal Summary* (if you have not already) when your PCS submits proof of its registration with BC Registries and its Application for the Delivery of CLBC services through a Person Centred Society (PCS Application).

The Support and Planning Policy has more information about CLBC's planning approach.

How can I prove to CLBC that my PCS is registered with the BC Registries?

Proof of registration includes a copy of the Person Centred Society's Certificate of

Incorporation and Bylaws.

To learn more about how to register a PCS, go to the BC Registries website.

Does CLBC require a Person Centred Society to apply to manage and deliver services on my behalf?

Yes. CLBC requires that a PCS applies to manage and deliver services on your behalf by completing the PCS Application as part of the planning process. Planning with CLBC involves completing:

- Your Personal Summary
- The Guide to Support Allocation process
- A PCS Application, and
- Other requirements as outlined in the Support and Planning Policy.

CLBC will review the PCS Application and will contact you with a decision.

Why does CLBC require a PCS to complete the PCS Application?

The PCS Application helps CLBC understand whether the PCS will be able to:

- Hire and manage employees and/or contractors
- Develop and manage service budgets
- Provide financial reports, and
- Oversee the delivery of quality, person centred services that supports your wishes and disability-related needs.

A PCS Board Chair (or designated Board member) completes the PCS Application and then works with CLBC to plan and contract for services.

What types and amount of support can I get through a PCS?

The types and amount of support and service that you can get through a PCS is similar to what other people 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 funds.

There are a few services that cannot be delivered through a PCS. They are:

- Communication and Behavioural
- Psychological
- L.I.F.E.
- Staffed Living

Can I use the PCS funds for other expenses?

Money that a PCS receives from CLBC may only be spent to hire support workers or to pay for other allowable expenses that are outlined in the Person Centred Society contract. This contract is between CLBC and the PCS which outlines the responsibilities of both parties. CLBC expects the PCS to spend your funding in the amounts allocated for each type of service which is stated in the Person Centred Society contract.

A PCS may use some money, up to the amount agreed by CLBC, for administrative costs to pay for accounting or bookkeeping services to help meet the Person Centred Society's legal responsibilities that come with being an employer.

Who will set up my supports and services?

Your PCS will help set up your supports and services. They will help hire workers or contractors or find activities for you in the community that meet your needs. They will be responsible for ensuring that all employment standards are met, and all funding is accounted for when setting up and paying for the supports and services.

Can I hire a family member with the money?

You can pay some family members to provide support services. You cannot hire your parents, children or spouse, except in special circumstances, and only for a short time and with CLBC's prior approval. For more information. please read CLBC's Service Provision by Family Members Policy or speak to your Analyst or Facilitator.

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

If your PCS receives funding to buy supports and services, they will work with you to make sure that what you receive is meeting your needs. Every year, the CLBC Analyst assigned to the PCS will arrange a monitoring visit or a check-in. This is an opportunity to discuss what is going well and what can be improved. For example, during this annual check-in, the CLBC Analyst may review bank statements, invoices, and receipts to see how the funding was spent and whether it is meeting your needs. You and your PCS will be in touch with your PCS Analyst throughout the year about ongoing service needs.

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

Because you and your PCS arrange your own supports and services, you can request a change at any time. If your PCS receives CLBC funding and arranges for services directly, they are the employer for the staff who work with you. If they are the employer, then they must follow the rules set out in the Employment Standards Act when you change staff.

What certification do staff who are paid by the PCS need?

Your PCS will be responsible for ensuring that the employee or contractor that you work

with has completed a criminal record check through the Ministry of Public Safety and Solicitor General's Criminal Records Review Program. Your PCS will need to register for an Organization Account on the Account Tab of the ministry's website. Other qualifications may include a Driver's Abstract, CPR and First Aid training, and privacy training.

Will my PCS take on any employer-related legal responsibilities when it hires support staff for me?

When a PCS pays support workers, the workers are considered either "employees" or "contractors" depending on the type of working relationship the PCS has with them. This distinction is important for your PCS to understand its legal responsibilities. This is because the Canada Revenue Agency, the Employment Standards Branch (BC), and WorkSafeBC have rules that define when someone is an employee or a contractor. A PCS Board is responsible for determining its legal responsibilities and which definitions apply to the support workers it hires.

Where can my PCS get help or support in understanding its legal responsibilities of being an employer?

A PCS can use some funding for administrative costs to pay for accounting or bookkeeper services to help fulfill the legal responsibilities of being an employer.

For help in understanding the legal and employer-related responsibilities, CLBC encourages Person Centred Societies to seek professional (legal) advice or contact the:

- Canada Revenue Agency
- Employment Standards Branch (BC)
- WorkSafeBC
- Vela Canada

Does my PCS need insurance?

Having applicable insurance coverage is an important part of doing business and is addressed in the contract between CLBC and Person Centred Societies.

If the PCS employs staff, it must register with WorkSafeBC as an employer and arrange for workers' compensation coverage for its employees. If people working for the PCS are contractors, the PCS should contact WorkSafeBC to ensure that its contractors have set up their own coverage.

Similarly, all Person Centred Societies are required to have Comprehensive General Liability Insurance. Most Person Centred Societies will be eligible for the Social Services Group Liability Program and will be automatically enrolled in the program by CLBC. Other types of insurance may be purchased by the PCS, including Directors and Officers Insurance.

As discussed above, it is important that the PCS check with the appropriate government agency (for example, the Canada Revenue Agency) so that it knows for sure whether the people working for the PCS are employers or contractors.

Does my PCS have to set up a special bank account?

A PCS must set up a separate bank account at a bank or credit union to manage CLBC funding. To help manage administrative costs (for example, monthly bank account fees), ask your bank or credit union about account options and internet banking tools (such as online bank statements) that may reduce banking costs. For example, some banks and credit unions may offer free services or waive their typical fees for Person Centred Societies.

If you have any concerns about setting up a bank account, please contact your local CLBC office.

How will my PCS receive the funding from CLBC?

CLBC funding will be transferred electronically to the PCS bank account. Your PCS will need to set up direct deposit to receive the money. If your PCS is already receiving payments from the B.C. government, let CLBC know so we can make sure the setup of Electronic Funds Transfers relating to your PCS contract goes smoothly.

If you have any concerns with the direct deposit process, please contact your local CLBC office.

Do I need to keep records of how my PCS spent the money?

Yes. Your PCS will need to keep records about the money it received and how it was spent. CLBC requires a PCS to have clear and accurate banking records. During the annual check-in or monitoring visit, CLBC staff will need access to:

- Monthly bank statements from your Person Centred Society's bank or credit union
- Copies of invoices, receipts, paid cheques, e-transfer records, and
- Any other documents supporting the transactions (that is, money going in and out of the PCS bank account).

Your PCS will also need to keep the records of the people it hires or contracts with so that government agencies, like the Canada Revenue Agency, BC Employment Standards Branch, or WorkSafeBC, can be sure that the PCS has paid the correct amounts to them and made the right deductions.

Will my PCS need to let CLBC know how I spend the money I get?

Yes. CLBC asks Person Centred Societies to show that they are spending the funding as

agreed to in the Person Centred Society contract. A PCS Board of Directors must submit an Annual Financial Report to its CLBC Analyst which shows all funds going into and out of the Person Centred Society's bank account. CLBC can provide Person Centred Societies with an example of an Annual Financial Report as part of the package of information the PCS is provided once CLBC approves the PCS Application.

Could my PCS be asked to pay back money to CLBC?

CLBC could ask your PCS to pay back money if it was not spent on things that were not agreed to in the contract with CLBC. The PCS could also be asked to pay back money if it did not use all the money CLBC gave it. It is important that a PCS follows the terms of its Person Centred Society contract and speaks with its local CLBC office for questions about its contract.

Can I have a PCS act as my Direct Funding (or Individualized Funding) agent?

Where a person chooses Direct Funding, a Person Centred Society cannot act as the agent. CLBC's Direct Funding Policy allows only one person to be an agent in a Direct Funding arrangement. A Person Centred Society has a minimum of three directors, which is a requirement by the BC Societies Act.

Alternatively, where a PCS exists that does not get CLBC funding, one of the directors could act as a Direct Funding agent. In this situation, the agent could work with the other PCS directors to support the person's direct funding arrangement.

What happens if I want to move to a different CLBC region?

You can still receive support and services in your new location if you stay in British Columbia. There are many things that need to be worked out before you move, such as finding new staff. First, you must call your CLBC Analyst or Facilitator to let them know that you are planning to move. The CLBC staff will work with you to help make sure you have the supports you need after your move. For more information about moving to a new community in B.C., visit the Moving – Transferring your CLBC Services section on the CLBC website.

What if I no longer want a PCS to manage and deliver my CLBC funding?

Call your CLBC Facilitator or Analyst to discuss how you can get your supports and services in a different way.