



<b>Policy Number:</b> SE4.033	<b>Policy Section:</b> Supports and Services	<b>Effective:</b> June 1, 2009 <b>Amended:</b> April 1, 2023
<b>Title:</b> Individualized Funding Policy		<b>Executive Sponsor:</b> Vice President, Service Delivery & Innovation

**Summary:**

This policy explains CLBC's Individualized Funding (IF) payment option. IF allows people to direct their own services. This can be done through Direct Funding or Host Agency Funding.

CLBC's IF Direct Funding option allows individuals or their agents to receive money directly from CLBC to purchase individualized supports and services. They can hire or contract with support workers and caregivers.

CLBC's IF Host Agency option allows individuals to select an agency to manage their funds for them.

The policy explains how to apply for IF and how it can be used. It also explains how funding is approved and the responsibilities of everyone involved.

## 1. PURPOSE

This policy describes Individualized Funding and how to request an Individualized Funding payment option. It also outlines the information that CLBC staff provide to individuals and their families and/or support networks to help them choose the most suitable Individualized Funding payment option.

The *Individualized Funding Policy* should be reviewed together with the *Direct Funding Policy* and the *Host Agency Policy*. These policies and related tools and procedures outlined in the reference section of this policy, are applied together as one set of guidance to support an integrated approach to Individualized Funding.

### Policy Framework

## 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 their own agent.

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

**Cultural safety:** An outcome of respectful engagement based on recognition of the power imbalances inherent to service systems, and the work to address these imbalances. A culturally safe environment for Indigenous peoples is one that is physically, socially, emotionally, and spiritually safe without challenge, ignorance, or denial of an individual's identity. Practicing cultural safety requires having knowledge of the colonial, sociopolitical, and historical events that trigger disparities Indigenous Peoples encounter, and perpetuate and maintain ongoing racism and unequal treatment.

**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.

**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 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 assist CLBC and others with planning, and with gathering information to complete assessment documents required to request support and/or funding through CLBC. The document is the individual and/or family's personal property.

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

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

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

**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.

### 3. POLICY

**3.1** Individualized Funding enables individuals and families to create new, innovative service options that support individuals to live in welcoming, inclusive communities.

**3.2** CLBC staff approach the Individualized Funding process in a sensitive and supportive way that aligns with the *Cultural Safety Policy*, demonstrating respect and sensitivity for an individual's culture.

**3.3** Through Individualized Funding, CLBC provides flexible, person-centred, self-directed payment options that allow individuals, their families and/or support network to arrange and manage the supports and services they require to meet their disability-related needs.

**3.4** Individualized Funding is available through Direct Funding or Host Agency Funding payment options. For specific requirements related to Direct Funding and Host Agency Funding, refer to CLBC's *Direct Funding Policy* and *Host Agency Funding Policy*.

**3.5** Individualized Funding is used to purchase individualized 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 meet CLBC's policy and contractual requirements and responsibilities outlined in the Individualized Funding agreement.

**3.6** Both Direct Funding agents and Host Agencies employ or contract directly with all support workers or caregivers and cannot sub-contract with an agency or organization to hire support workers on their behalf.

**3.7** Individualized Funding is available for new supports or services or as an alternative to existing contracted services. Individualized Funding cannot be used to purchase spaces in or to expand existing group programs that are already paid for by CLBC.

**3.8** Individualized funding can be used to purchase services identified in the *Supports Funded by Community Living BC*. The amount CLBC allocates to an individual is based on the:

- Individual's disability-related needs,
- Estimated cost of the needed supports, and
- CLBC's financial resources.

The types and the amount of supports and services CLBC funds are consistent with what other individuals with similar levels of disability-related need have based on the *Supports Funded by Community Living BC* document. When CLBC does not have funding available, requests for new or increased Individualized Funding are managed and prioritized in accordance with CLBC's *Request for Service Policy*.

**3.9** 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.

**3.10** CLBC-funded services should complement, not replace, the natural supports and generic services the individual is already accessing.

**3.11** When an individual and family requests an Individualized Funding payment option (either Direct Funding or Host Agency Funding) a Personal Summary must be completed to support this request, as outlined in the *Support and Planning Policy*.

**3.12** Services purchased from caregivers who are related or are immediate family members must comply with CLBC's *Service Provision by Family Members Policy*.

**3.13** Individuals and families can select a combination of options including Direct Funding, Host Agency Funding and/or contracted services, and can request a change to contracted services or to the other Individualized Funding payment option.

**3.14** Host Agency Funding is only available as a payment option when individuals are allocated funding over \$6,600.00 per year.

**3.15** If an individual and their family requests Direct Funding over \$10,000 per year, they must also complete the *Individualized Funding – Direct Funding Standard Addendum* in addition to the Personal Summary.

If individuals and families request Direct Funding of less than or equal to \$10,000 per year, the *Individualized Funding – Direct Funding Standard Addendum* is not required.

**3.16** Individuals and families who are interested in learning about or requesting an Individualized Funding payment option should contact their local CLBC office.

## **4. PROCEDURES**

**4.1** Facilitators are responsible for providing information to individuals and families about Individualized Funding payment options (Direct Funding and Host Agency Funding) to support them in deciding which option will best meet their needs.

4.2 Procedures on how facilitators and quality service analysts can support individuals and families to access Individualized Funding payment options are outlined in the *Direct Funding Procedures Guide for Facilitators and Analysts* and the *Host Agency Funding Procedures Guide for Facilitators and Analysts*.

## 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 help individuals achieve their goals and dreams.

## 6. REFERENCES

### Guidance for Staff

[Criminal Record Check Policy: Service Delivery](#)

[Cultural Safety Policy](#)

[Direct Funding Policy](#)

Direct Funding Standard Agreement Procedures and Practice Guide for CLBC Staff

Direct Funding Standard Agreement Procedures and Practice Guide for CLBC Staff

[Eligibility Policy](#)

[Host Agency Funding Policy – Individualized Funding](#)

Host Agency Funding Procedures Guide for Facilitators and Analysts

Individual and Family Wellness Policy

Planning with People: Practice Guidance for CLBC Staff

[Request for Service Policy](#)

[Service Provision by Family Members Policy](#)

[Support and Planning Policy](#)

Supports Funded by Community Living BC

### Resources for Individuals and Families

[Guide to Individualized Funding](#)

Individualized Funding – Direct Funding Standard Addendum

[Individualized Funding Fact Sheet](#)

[Nidus Personal Planning Resource Centre and Registry \(www.nidus.ca\)](#)

[Managing the Money: Direct Funding Simplified Guide](#)

[Managing the Money: Direct Funding Standard Guide](#)

Personal Summary