



<b>Policy Number:</b> SE4.211	<b>Policy Section:</b> Supports and Services	<b>Effective:</b> April 23 , 2008 <b>Amended:</b> July 19, 2018
<b>Title:</b> Service Provision by Family Members		<b>Executive Sponsor:</b> Vice President, Regional Operations

## 1. PURPOSE

This policy outlines the choices available and procedure and practice guidelines for individuals, families and CLBC staff when an individual requests that a family member or an immediate family member provide CLBC-funded supports. Facilitators and analysts have roles in carrying out this policy.

## 2. DEFINITIONS

**Family Member:** Anyone, excluding a parent, child, or spouse, who is related by blood, marriage, adoption or custom adoption.

**Immediate Family Member:** A parent, child or spouse.

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

**Individualized Funding:** Self-directed payment options as described in the *Individualized Funding Policy*.

**Parent:** A parent, including step-parents and adoptive parents.

**PARIS:** The CLBC client information management system.

**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.

**Person Centred Society:** A non-profit society established to direct service for an individual.

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

**Spouse:** A person married to the individual or living in a marriage-like relationship.

### 3. POLICY

**3.1** CLBC supports individuals in maximizing choices in how they live, in the service delivery options they select, and in developing and maintaining strong relationships with their families.

**3.2** A family member, except an immediate family member, may be paid to provide service for an individual when there is a need for CLBC funded supports.

**3.3** An immediate family member cannot be paid to provide CLBC-funded service **unless** an exception is approved by an Integrated Service Manager.

**3.4** An exception may be made to pay an immediate family member to provide CLBC-funded service if **all** the following criteria are met:

- i. The individual or support network wishes to pay an immediate family member to provide CLBC funded services that CLBC would have otherwise provided.
- ii. There is no appropriate or available caregiver to provide for any of the individual's extraordinary or unique needs for **one or more** of the following reasons:
  - (a) Nature and degree of care required, such as the complexity of care requiring extensive training, issues with trusting caregivers, or unique scheduling needs
  - (b) Rural or remote locations causing accessibility difficulties for the individual requiring service
  - (c) Cultural considerations such as customs, values and beliefs that affect care needs
  - (d) Communication barriers such as languages spoken, speech, or specialized communication needs
- iii. The individual's family circumstances have been considered.
- iv. When applicable, appropriate respite for the immediate family member is requested.

**3.5** Facilitators provide guidance and information when a request for service is made that includes service provision by an immediate family member. Analysts will review service provided by an immediate family member annually to ensure that the exception criteria continue to apply.

- 3.6 Immediate family members or family members paid to provide service when the Individualized Funding Direct Funding option is chosen cannot be the administrator (agent) of the funds.
- 3.7 When the Individualized Funding Host Agency Funding option is chosen, the agency will use its standard screening and personnel procedures when hiring a family member or immediate family member.
- 3.8 Immediate family members or family members paid to provide service cannot be members of a person-centred society for the individual receiving the service.
- 3.9 The family member and immediate family member who are paid to provide service must comply with all the policies, procedures and standards that apply to the provision of the service provided.

#### 4. PROCEDURES

- 4.1 A proposal to pay an immediate family member for service provision for an individual determined to be eligible for CLBC services must be submitted when a request for service is made verbally or in writing or as part of an individual's plan (if available). This is done with a facilitator's assistance and support. The proposal must outline the reasons why service provision by an immediate family member is the preferred option, including the specific exceptional criteria that apply.
- 4.2 An analyst reviews the request for service and proposal to pay an immediate family member to determine if the reasons for service provision by an immediate family member have been fully described and addressed. The analyst completes the *Service Provision by Immediate Family Members Exception Form* and forwards to the Integrated Service Manager for approval.
- 4.3 The Integrated Service Manager reviews the completed *Service Provision by Immediate Family Members Exception Form* and bases their decision on the individual's circumstances and the policy considerations for making an exception. The analyst provides the individual and their family or support network confirmation in writing that the exception has been approved, subject to annual review to ensure that the reasons for allowing the exception continue to apply.
- 4.4 If service provision by an immediate family member is approved and funds are available, then an analyst assists in initiating the service. If funds are not available to provide the requested service, the request is prioritised and added to the Request for Service List in accordance with the *Request for Service Policy*.
- 4.5 Initially, or when funding becomes available, and if an immediate family member is

still the approved exception, the analyst enters into a contract with the immediate family member to allow for the service provision with a person-centred society, if applicable, or through an individualized funding option as outlined in the *Individualized Funding Policy*.

- 4.6 The analyst will annually review the service quality and to ensure that the reasons for allowing the exception continue to apply. The *Service Provision by Immediate Family Members Exception Form* must be completed and approved by the Integrated Service Manager annually.

## 5. DOCUMENTATION

- 5.1 The outcome of the review (of the *Service Provision by Immediate Family Members Exception Form*) and the Integrated Service Manager's decision is documented in PARIS. This applies to the initial review and all subsequent annual reviews.
- 5.2 The *Service Provision by Immediate Family Members Exception Form* (with the Integrated Service Manager's approval), the Personal Summary and the individual's plan (if available) are uploaded to the individual's PARIS file.
- 5.3 The request for service for service provision by family member or immediate family member option is identified in PARIS in priority order on the Request for Service List.

## 6. PRACTICE

- 6.1 Proposals for service provision by family members or immediate family members should address the following:
- Is it the expressed or understood wishes of the individual requiring support that the family member or immediate family member provides the service?
  - Does the individual's Personal Summary, plan (if available) or the proposal for service provision by family members or immediate family members include strategies to ensure that he or she is connected to the community and not isolated?
  - Is the need for service provision clearly related to the individual's disability-related need for support, and is it outside of the day-to-day support and assistance normally provided by family members or immediate family members (i.e. if a family member had not been chosen as the preferred service provider, is the need such that funding would have been provided to an external service provider?).
  - Is it clear that the primary rationale for paying a family member or immediate family member to provide the service reflects the individual's circumstances and unique needs, as opposed to financial considerations for the family member or immediate family member?

- Is the proposal realistic and appropriate, and have potential risks such as the need for respite, impact on other family members, conflict of interest, potential health risks or taxation considerations to the family member providing service been considered by CLBC and the family member or immediate family member?

6.2 When monitoring service provision by a family member or immediate family member, the analyst ensures that:

- The services are goal focused and meet the individual's needs
- The same expectations and standards apply to the related family member or immediate family member providing service as other service providers , and
- The reasons for service provision by an immediate family member continue to apply.

## 7. REFERENCES

### **Guidance for staff**

Direct Funding Policy – Individualized Funding

Eligibility Policy

Host Agency Funding Policy – Individualized Funding

Individualized Funding Policy

Planning with People: Practice Guidance for CLBC Staff

Request for Service Policy

Service Provision by Immediate Family Members Exception Form

Support and Planning Policy

### **Resources for Individuals and Families**

Information for Families: Individualized Funding

Personal Summary