



Policy Number: SE4.360	Policy Section: Supports and Services	Effective: July 19, 2018
Title: Support and Planning Policy		Executive Sponsor: Vice President, Regional Operations

1. PURPOSE

This policy outlines how Community Living British Columbia (CLBC) welcomes and supports individuals and families to plan for the future. This policy applies to individuals or youth who are confirmed eligible for CLBC services and also to those who may be eligible and apply in the future. CLBC does not plan with adults or youth who have not been confirmed eligible even if they have completed the welcome process.

CLBC's approach aligns planning efforts with other government organizations and community partners, including school districts, and CLBC-funded service providers to support a more integrated experience for individuals and their families.

The *Support and Planning Policy* should be reviewed together with the *Community Supports Policy* and the *Youth Transition Support Policy*. These policies, and related tools and procedures, are applied together as one set of guidance to support an integrated and comprehensive approach to planning.

2. DEFINITIONS

Care Team: Specific to individuals who are aging, an enhanced support network including the individual and everyone (e.g. family, service provider, healthcare provider) who has a specific role in caring for or supporting them.

Differential Planning Approach: Planning support that is individually tailored depending on a range of considerations, including: what the individual wants, what other supports an individual has, what prior planning has been done, the urgency and intensity of planning required.

Generic services: Publicly funded services that all citizens access, for example, libraries, colleges, or community recreation centres.

Guide to Support Allocation: An electronic tool used by CLBC to outline an individual's disability-related needs.

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

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

Natural Supports: Support provided on a voluntary basis by an individual's support network, including family, friends, neighbours, co-workers and others. Additional support may come from participation in associations (e.g. social clubs and groups) or community activities that have public participation (e.g. sport teams, adult interest groups like garden clubs and community choirs, faith communities).

Old Age Security/ Guaranteed Income Supplement (OAS/GIS): Federal income payments made to eligible individuals, age 65 and over.

Service Planning: Planning generally engaged in with a CLBC-funded service provider. It is service focused, with specific goals, objectives and action steps a service provider might support individuals to take in order to meet their goals in a service.

Socially Valued Roles: Based on Social Role Valorization Theory, it is the use of culturally valued means to enable and assist people who are at risk of having a devalued status in society to have a full meaningful life. To have a socially valued role, the person's actions must be perceived by others in community as valuable or important.

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 Guiding Principles

CLBC's support and planning approach is guided by the following principles:

Person-Centred Approach

Individuals are at the centre of the planning process which reflects the individual's unique circumstance. Individuals are encouraged and supported to have as much involvement and control over the process as they wish.

Asset -Based

The individual, the support network or CLBC guides the process to ensure the focus is on the individual's strengths, gifts and abilities rather than deficits.

Choice/Self-Determination

Planning is driven by the individual, reflecting the individual's goals and aspirations and resulting in greater ownership of the process and decisions that affect them.

Occurring Across the Lifespan

Planning occurs at different times throughout a person's life as required, reflecting changes to their goals, aspirations and support needs, which may result in fluctuating levels of engagement with CLBC.

Proactive

Proactively planning for transitions means that individuals anticipate and prepare for life changes (e.g. entering adulthood, aging, changing services or service providers) rather than responding to crises.

Focus on Quality of Life Outcomes

The aim of planning is to achieve positive, quality of life outcomes for individuals, including development of relationships beyond paid relationships and having socially-valued roles in community.

Collaborative

Alignment with, other government organizations and community partners, including schools and service providers, reduces confusion and duplication of planning efforts and improves individuals' quality of life.

3.2 Operational Context

CLBC has a dual role of connecting people to community and to supports and services. CLBC supports planning for youth, individuals and families by first sharing information about CLBC, then welcoming them to CLBC with preliminary information needed to plan for the future, and planning more intensively with eligible individuals, if requested.

CLBC's planning approach:

- Ensures, youth, adults and families and those they may come in contact with (e.g. key community and government partners) before accessing CLBC have basic information about CLBC
 - Builds trusting, collaborative relationships with individuals and families through a welcome process that empowers them to make informed choices about their future and next steps (e.g. are made aware of opportunities and possibilities available to CLBC-eligible adults)
 - Ensures individuals and families are aware of planning options available to them both through CLBC and through external government partners and independent planners (e.g. Planning Alternative Tomorrows with Hope), and
 - Offers differential planning options and support that promote choice and flexibility for
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eligible individuals and families who choose to plan more intensively with CLBC after the welcome process.

3.3 About CLBC Process

About CLBC is a process of providing access to information about CLBC early to prepare youth, individuals and families to engage with CLBC. CLBC provides consistent information *About CLBC* directly or through key community and government partners (e.g. schools, Ministry of Children and Family Development (MCFD), healthcare professionals) who may come in contact with youth, adults and families.

CLBC establishes and maintains relationships with key external partners to ensure they have an accurate understanding of CLBC's role and have access to current, up-to-date information about CLBC to share with youth, adults and families.

3.4 Welcome to CLBC Process

CLBC welcomes, listens to and communicates openly and honestly with adults or youth and families when they engage with CLBC. CLBC provides consistent, transparent and accurate information directly through a welcome process that informs youth, adults and families about planning options, government services, community resources, and CLBC supports and services, including how funding decisions are made.

The welcome process is intended to:

- Empower individuals and families to make informed decisions about planning
- Improve, and better manage transitions (e.g. from youth to adulthood, aging adults)
- Broaden the understanding of the adult service landscape beyond funded services only to adult rights and valued social roles in the community
- Help reduce concerns around support planning, including about access to community resources and the availability of CLBC-funded supports and services, and
- Build peer and community relationships and help youth, adults and families connect with supports and resources within their community.

The welcome process can be delivered before, during or after eligibility has been confirmed and as often as needed. The information is delivered in multiple formats, such as through workshops and individually (i.e. with a facilitator), and in different locations, such as at schools, libraries, other community venues (including in Indigenous communities) and CLBC offices.

In the event that CLBC first engages with an individual who requires services immediately to respond to an emergency, the welcome process may be delayed or adjusted to meet the individual's urgent needs.

3.5 Differential Planning Options

Planning is an important and ongoing process that helps eligible individuals determine what is important *to them* and *for them* in their life and for their future. Different circumstances and personal preferences help guide what planning approach and tools are used at any given time (e.g. transitioning youth, complex needs, aging, changing services).

CLBC provides information about differential planning options within and outside CLBC based

on individual and families' wants and needs. CLBC supports eligible individuals and their families to make an informed choice about who they want to plan with (e.g. independent planner; support network; other government organizations or CLBC) and how they want to plan. Individuals have the choice to participate in planning that works best for them.

Different planning approaches can be used at different times in an individual's life depending on their preference, circumstance and support needs. No matter what approach is used, the individual and their family own any planning documents CLBC helps develop and/or funds (i.e. independent planning options) and the processes used to inform them. CLBC supports individuals and families to determine the most appropriate planning approach to meet the individual's strengths, goals and support needs.

3.6 Personal Summary

As part of the planning process, CLBC encourages eligible individuals and their families to create a Personal Summary which holds key pieces of information about themselves, and where relevant their support requirements. A Personal Summary is intended to:

- Inform planning with CLBC and other planning partners
- Support connections to natural and generic supports
- Assist CLBC in completing required documentation when funded services are requested, and
- Assist individuals when engaging in service planning with service providers or engaging in Individualized Funding arrangements.

It may include information about a person that CLBC and/or a service provider might need such as strengths, goals, likes, dislikes, support needs, desired next steps and medical information or considerations. It meets service provider requirements for information about a person and also creates a positive, balanced representation of the individual.

Individuals and their families create and own their Personal Summary and can update or change it at any time. A Personal Summary can be developed in collaboration with their family, support network, or a friend, as well as with a trusted advisor, independent planner, external resource or with CLBC's support. Individuals and families are encouraged to share it with the person or organization they choose to plan with.

A Personal Summary is **required** when an individual requests CLBC-funded services except when individuals are requesting employment services or minimum service (e.g. \$2800 or less).

3.7 Planning with CLBC

If an individual chooses to plan with CLBC, facilitators play a key role in supporting them and their families throughout the process. Depending on an individual's needs and their family's request, facilitators planning support may include:

- Developing a relationship with the individual and their family to better understand the person's strengths and goals
 - Drawing on information from the individual's Personal Summary and other shared information
 - Engaging in a Quality of Life Personal Mapping process
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- Selecting a planning method to meet an individual's planning needs and address their personal circumstances
- Adapting the selected planning method to an individual's needs in order that they can more fully participate
- Sharing and incorporating knowledge of relevant community resources, and
- Supporting individuals to consider socially-valued roles in their community.

3.8 Planning with Aging Adults

CLBC proactively plans with older adults and their support network or legal representative (if one is in place) to ensure a smooth transition as they age.

At age 55, CLBC checks in with the individual and/or their family, support network, legal representative or service provider to encourage discussion about age-related support changes. CLBC gathers planning information and completes or updates the necessary documentation and records requests for service to ensure services reflect the individual's current and future support needs.

Ongoing after age 55, CLBC participates in, develops and/or coordinates a care team, facilitates community connections to seniors' resources, and responds to requests for aging-related support changes.

At age 63, CLBC checks in again with the individual, and/or the service provider, support network, family and legal representative to gather planning information. CLBC also completes or updates the necessary documentation, records requests for service, and supports the individual's financial transition to Old Age Security benefits, ensuring two years of tax filing is completed prior to age 65.

When there is a change in service provider and/or services, CLBC encourages the individual together with the care team to choose who and how they want to plan in implementing the changes.

Individuals, families and service providers can check in with CLBC at any age if or when an individual's circumstance change and request planning support at any time.

3.9 Community Connection and Engagement

CLBC supports individuals and their families to connect to community-based generic services and natural supports that can support the individual's interests and goals and enable them to have a socially valued role in community. Leveraging community assets and opportunities allows CLBC to plan more comprehensively and to connect individuals to community in meaningful ways to support community inclusion.

CLBC partners with individuals, families and community partners to map local community resources. CLBC supports the establishment and maintenance of tools to document and make available information about community assets for individuals, families, service providers, external partners and CLBC staff.

3.10 Gathering Information to Request CLBC Funded Services

Information gathered through planning with CLBC, independently or with an external party may be reviewed to support the completion of CLBC's required documentation and inform the resource allocation process. CLBC uses:

- Information shared through relationships developed with youth, individuals and families
- A youth or individual's Personal Summary, and
- Other information the youth, individual and family chooses to share about themselves.

When service funding is approved, the individual may share their Personal Summary with the relevant service provider(s) to ensure a mutual fit between the service provider and the individual, inform service planning or to guide Individualized Funding arrangements.

3.11 Plan Document

While a written plan is not required as part of the planning process, a Plan document may be produced when an individual and family specifically requests one, and in specific planning situations such as children-in-care or individuals with multiple, complex needs.

In these situations, multiple planning partners are involved, funded services are likely to be required and prioritized, and documentation is needed to ensure a common understanding or accountability.

3.12 Other Facilitator Support Roles

In addition to providing support in planning-related decisions, referrals to external planners and planning directly with individuals and families, facilitators provide other supports, typically short term in nature, that include:

- Providing information about CLBC and other agencies
- Connecting individuals to community-based generic services and natural supports
- Helping individuals to identify and connect to a support network, if appropriate
- Assisting individuals to identify what they need to feel safe and in control of their lives and helping them identify resources for formal and informal safeguards
- Participating as a member of a multi-disciplinary team (when service coordination is taking place), and
- Providing goal-focused and time-limited individual and family support in response to the identified issue.

4. REFERENCES

Guidance for Staff

Confidentiality and Information Sharing Policy
Direct Funding Policy – Individualized Funding
Host Agency Funding Policy - Individualized Funding
Individualized Funding Policy
Planning with People: Practice Guidance for CLBC Staff
Request for Service Policy
Resource Allocation Policy
Resource Allocation Practice Guide

Service Provision by Family Members Policy
Staff Q and A: Support and Planning Policy
The Person Summary Document: Information Sheet For Facilitators
Updated Planning Approach: Quick Reference for CLBC Policy Changes
Youth Transition Support Policy

Resources for Individuals and Families

Addressing Personal Vulnerability through Planning
Aging Parents Pamphlet
Aging with a Developmental Disability: Planning Guide For Families
Belonging to One Another: Building Personal Support Networks
Brothers and Sisters: The Power of Growing Up Together
Information for Families about Getting CLBC-Funded Services
Information for Families – Planning
Personal Summary
Responding to Vulnerability: A Discussion Paper about Safeguards and People with
Developmental Disabilities
Rights and Safeguards: A Plain Language Guide for Self-Advocates
Self -Advocate Workbook: My Plan
Support Networks: A Plain Language Guide for Self-Advocates
The Power of Knowing Each Other: Stories about Informal Safeguards told by BC Families
Understanding Vulnerability – A Guide for Self-Advocates
www.awaresharecare.ca