

***Individualized Funding Forum:
The Role of Agencies***
Ontario Federation of Cerebral Palsy
May 12, 2006

John Lord's opening address captures the nature of individualized funding and potential roles for agencies. In the attached Power Point Presentation, John outlines how a *New Story* is emerging from people committed to individualized funding. The *New Story* stresses portability, individualized funding, and independent planning and facilitation.

If you did not attend the session, please review the Power Point Presentation now to get a sense of the overall directions of the *New Story*.

During the Forum, agency representatives had questions in two main areas:

- what is this thing you call IF and how does it work ?
- how can I be part of the *New Story*?

What is this thing you call IF and how does it work ?

Difference between individualized funding and direct funding?

- Direct funding means that the money for disability supports go directly to the person to manage and administer. Some people would prefer not to self-manage and therefore there should be options to people to get others to assist them.

How does the person work with the staff in an IF Approach?

- Judith Snow responded that unlike traditional arrangements, she chooses to take the lives/schedules of each staff into account. The idea is to create the best match possible on a week to week basis. Most of the time this results in Judith having flexible supports & her staff have a fair amount of flexibility to pursue their own interests.

Is there a mechanism to allow for individual budgets to be adjusted each year? If so how?

- Most IF programs allow people to re-apply each year, so that budgets can be adjusted.

How does facilitation work? Is the cost of a facilitator built in to most budgets?

- In most places, planning and facilitation support is a separate function. In B.C., people can also hire their own facilitator and receive payment for that. Facilitation works best for people when it is ongoing to a degree. In the early stages, it will be focused very much on planning and network development and enabling a person to figure out their intentions and goals to build a full life in community. Once a person has been funded, the facilitation role shifts to supporting the person the implement their plan.

How do people (who are supported) react to any indications that another person may be getting “more” staff support that they do?

- John Lord talked about an IF system that must be concerned with equity in the same way that other systems have to be as well. Two keys are; a simple and clear application process, and a simple and clear allocation process. John pointed out that the *Common Vision* group has done a lot of work on this and their documents can be assessed at the Individualized Funding Coalition web site – www.individualizedfunding.ca

What is portability and how does it work?

- Portability means that the person’s disability support funds are attached to them. This means that if you are receiving 3 hours per day from one agency, you would be able to take the funds for those supports and move them to another agency or in fact purchase them yourself. It is more difficult for SSLU’s because if someone left with their funds, it would be difficult to balance the system. This is why portability needs a policy that gives flexibility and control to consumers and also supports providers to support it. MOH does not have a portability policy yet, except for the Direct Funding Project.

Questions that relate to how can I be part of the *New Story*?

Principles or procedures I can change NOW!

- The panel stressed that you need to “think big” and start small. Thinking big enables you to keep the full picture in front of you. Starting small means you might begin with one or two individuals who want to change their situations. Get connected with facilitators who can play that important role. Listening to people’s dreams and goals is important.
- The Individualized Funding Coalition web site has a new *Planning Guide* that is very useful for individuals and families as they begin to plan their future. See www.individualizedfunding.ca
- Also see John Lord’s web site for more information on planning and facilitation and research completed on individualized funding – www.johnlord.net

How successful have agencies been in moving to individualized approaches?

- Charlotte Dingwall described how one agency transitioned (over a few years) so that every person moved from shared living to individual circumstances of choice. After ten years there is only one of the original forty-five people who seems to not to have found ‘their’ place in the community.
- John noted that many of the lessons that are attributed to IF are actually derived from very creative initiatives of agencies in response to the people they support.
- Beth Ward mentioned that once their agency began to seriously question as to how might they provide services in more individualized ways then the ‘teachers’ appeared. Teachers are often people with disabilities themselves; sometimes it is community facilitators who enable people to plan new directions.

- IF may be more difficult in union environments, but the panel cited examples of how agencies had been able to negotiate agreements with unions that supported individualized approaches and more control for the person.
- Agency change is facilitated by policy changes that lead to transformation. John explained that the Ministry of Community and Social Services has announced that they are moving to direct funding, portability, and independent planning and facilitation. The Individualized Funding Coalition has pushed hard with MCSS and is now beginning to do the same with Health Ministry.
- Beth Ward, an executive director from Huntsville suggested that agencies that are committed to the people must be prepared to give up and divest portions of their funding so that new initiatives can begin locally. This happened in B.C. and elsewhere when governments and agencies were moving to independent planning and facilitation.

How likely are we to see governments move in this direction?

- The Ministry of Community and Social Services is moving quickly in this direction for people with developmental disabilities. They have made recent commitments to direct funding, portability, and independent planning and facilitation. The Ministry of Health and Long Term Care says they are moving toward a policy on IF, but there are no tangible signs as yet. The Individualized Funding Coalition is working with both Ministries to move this agenda ahead.
- To access the Ministry of Community and Social Services document called Opportunities and Action (which outlines their commitment to direct funding), see www.mcass.on.ca