

**The Individualized Funding Coalition for Ontario
Response to MCSS about
Opportunities and Action
June 2006**

*Respectfully submitted by the
Individualized Funding Coalition for Ontario*

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The Individualized Funding Coalition for Ontario (IFCO) has a decade of commitment and activity devoted to bringing individualized funding and supports to Ontario. Like many Ontarians, we have been actively engaged with the Ministry of Community and Social Services (MCSS) over the last eighteen months in a dialogue about transforming the province's services for people with developmental disabilities. We are pleased and encouraged by the MCSS's commitment to transformation. This paper is our response to the document *Opportunities and Action* which is its report on this consultation.

We Appreciate!

IFCO appreciates that the transformation envisioned in *Opportunities and Action* is based in the values of citizenship, fairness and equity, accessibility and portability, safety and security, accountability, and sustainability. For us the principle of **citizenship** underpins the continued development of an Ontario society where the participation and contributions of people with disabilities are valued as full citizens, with their status equivalent to other citizens. We also believe that portability is fundamental as it will greatly enhance citizenship.

We appreciate that Section 2, *Plan for System Transformation* describes a commitment to **independent planning and to individualized/direct funding**. We believe that independent planning and individualized/direct funding are cornerstones in a transformation from fostering dependency to empowering people, their families and support networks.

Our Thoughts

IFCO has a concern that in *Opportunities and Action* MCSS recognizes but has not yet structured independence into the planning designed to support individuals. For citizenship and accountability to be fully established, each essential element of the support service system must be capable of functioning separately from the others. Planning must be separate from service delivery and from access centres. Access and allocation need to be respectful, as private as possible, and utilize equitable and fair processes. Strong citizen-based voices (family networks, People First, etc.) must be autonomous and sustained partners in Ontario communities. Agency based services and supports must be separate from all the other functions named above. We have included a diagram to illustrate this reality at the end of this document.

IFCO believes that the establishment of independent planning is also essential as a mechanism of overcoming the deep prejudices that currently face people with developmental disability. The extensive history of segregation, (well

documented in *Opportunities and Action*), has created a culture where the contributions of vulnerable people are underestimated and devalued.

We have all lived under a system that has resulted in low expectations, limited creativity, a culture of specialness and reduced relationship in community. IFCO’s extensive experience in providing community engagement and dialogue about values is that people, families and their networks, and providers often need support to understand the full possibility of citizenship. Implementing the transformed values envisioned in *Opportunities and Action* requires the empowerment made available through independent planning and facilitation. (See Appendix A)

The publication of *Opportunities and Action* took place just as MCSS’s new transition program, Passport, was being rolled out. IFCO is in the position of being able to compare MCSS’s vision with what is happening during the first stages of implementation. ***We find ourselves with a striking mismatch between our hopes for transformation and what our members are reporting as their experience with early implementation of Passport.***

<p style="text-align: center;">The Vision Gives us Hope</p>	<p style="text-align: center;">Our Current Experience</p>
<p>Independent Planning and Facilitation is fundamental.</p>	<p>In the Passport roll out, most regions do not have independent facilitators available to assist people. Planning with individuals in most areas will not be unencumbered. If planning is implemented at all, it will usually be after other system issues have been determined (e.g. eligibility, funding allocation). This will have a limiting impact on how many people utilize their community as a first resource, and on how informed people will be about the range of possibilities and opportunities.</p>
<p>Services and Supports are tied to the Individual’s Participation Goals</p> <p>The Foundation of the Service System will be Self -Determination and Citizenship</p>	<p>In <i>Opportunities and Action</i> respite is framed as a stand alone support service. Yet, parents and other primary supporters would look at things differently if individuals were supported adequately to participate in their communities. For example, typical parents get breaks when children go to camps, retreats, sleep-overs and get summer jobs. They also get breaks because of their friendships, relationships and extended family built in the community. Individualized/Direct funding that is adequate and used in tangent with an empowered planning process, one that includes relationship building, would lessen the need for specialized respite service. When adult children get a life so do their parents.</p>

<p>Accessibility and Portability are valued.</p>	<p><i>Opportunities and Action</i> outlines the creation of financial incentives for parents and others to create housing for people with developmental disabilities. The IFCO believes that direct funding can empower people to use the same range of housing options that are available to other citizens in Ontario. The keys are:</p> <ul style="list-style-type: none"> - independent planning that will enable people to use resources available to all citizens - funding supports that are separate from housing. - portability of funding so that people can live and purchase services wherever they want within their community and even move elsewhere in Ontario
<p>Independent Planning and Facilitation along with Individualized/ Direct Funding can make transitions easier, seamless and meaningful.</p>	<p>Passport dollars, in some regions, will be used to bolster agency services. Our members are discovering that agencies are encouraging families to have them help with the application, hold their funds, plan with them and provide service. Although the Ministry wants to ensure choice for people, in not establishing an alternative for people and families who access individualized/direct funding like independent planning and other creative strategies, transformation will be limited. More of the same will continue being entrenched and real transformation has the potential to be frustrated.</p>
<p>Access and Self-Determination</p>	<p>The name ‘Passport’ is confusing to many people who are seeking to access support or funding. It implies that they need permission to be part of their communities. Some people have even wondered whether they need an actual passport to receive funds.</p>
<p>Respectful, Accessible and Accountable processes</p>	<p>Having established trust with people and family groups throughout the consultation process, limitations in the roll out of Passport and the use of current access and allocation processes could threaten this trust. In terms of access and allocation IFCO sees building trust with people, their families and networks at this early point in implementation as critical.</p> <p>Families have had confidence in Special Services at Home processes where:</p> <ul style="list-style-type: none"> - government allocates the funding. - agencies and access centres do not influence the access, prioritization and allocation processes - privacy is maintained for the person and family - there is an appeal mechanism. <p>These design features need to be part of a transformed system that includes individualized/direct funding.</p>

A Support Environment founded in Citizenship	<i>Opportunities and Action</i> proposes a special tax and wills initiative and a disability savings plan. In a citizen centered environment this would be redundant because people with developmental disabilities would have the capacity to invest and use their resources creatively. Our society has become used to a “special” world for people with disabilities to participate in and this should no longer be necessary. Ending ‘specialness’ includes recognizing that supportive ways to use resources inclusively can be created if they are not already there.
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In Summary

We are hopeful that the MCSS vision of transformation will include the power of individualized/direct funding and independent planning as cornerstones for transformation. We are concerned, however, that the current implementation process of this vision of transformation may not be guided by the same values and vigilance that have marked the consultation process. Some of the issues that have come to our attention through our membership include:

- variation among regions;
- people and families not centrally involved;
- processes for access and allocation that leave people and families vulnerable;
- service providers resisting transformation; and,
- program development staff and regional directors struggling with change.

Transformation is a difficult process given the realities of funding and sustaining a traditional system while at the same time adding new features for those who want something different. The pulls from the current system to keep doing things the same way will pose barriers to change. It is understandable that MCSS would experience resistance from service providers. It will be important, however, for MCSS to make it clear that real change will happen by structuring a truly transforming implementation process.

Conclusion

Like MCSS, the Individualized Funding Coalition for Ontario wants real transformation to occur in Ontario. It would be only a partial transformation for MCSS to put Passport and an individualized respite program in place and stop there. IFCO believes that it is important for MCSS not to settle for a transformation that ends with minimum outcomes. It is the right time to do the work and create the resources necessary to authentically transform our support environment.

We appreciate the willingness of MCSS to listen to concerns as they arise and to continually try to improve processes. We know that MCSS is seeking real change.

IFCO believes that to fully realize the vision set out in the values of *Opportunities and Action* it is time to implement all the fundamental elements. These include:

- Independent planning and facilitation

- Fully portable individualized/direct funding that comes in one package to an individual or family regardless of how many programs and Ministries the funding is drawn from.
- Access and allocation processes that people, families and networks have confidence in.
- Working together to find a mechanism to support autonomous family and People First groups. The system remains off balance without those strong voices. In valuing this role which creates healthy tensions in the system, educates and keeps things accountable we must find a solution for sustainability.
- Making support network development a priority: Recognizing that building and sustaining relationships in community is key to empowering participation. Building a support network is not just another activity but an essential outcome of good support.
- Ensuring that all participation goals can be addressed, including parenting supports to assist people with developmental disabilities in raising their children. We support People First in this regard.
- Traditional support worker training programs frequently work against staff being able to provide good participation support. Families and individuals must be free to use their individualized/direct funding to hire staff from any source that works for them and train them in methods that truly address their participation needs and wishes. In addition a province-wide discussion is required about how to prepare workers to be community-based and participation-based.

The hopeful vision of *Opportunities and Action* is its ability to support a future that is both short and long term - one that is **Principle-based** and **Person-Directed**. **We encourage the MCSS with their commitment to continue the dialogue.** This would be a commitment to consult, plan and create strong, value-based actions with all stakeholders in order to truly transform Developmental Services in Ontario.

The IFCO thanks MCSS for this feedback opportunity and looks forward to a continued partnership and working together.

Our Vision for an Individualized/Direct Funding Approach in Ontario

*Developed by the Individualized Funding Coalition for Ontario
at the membership meeting of June 15, 2006*

BACKGROUND: Individualized/Direct Funding

Individualized funding provides the means for a person to meet their individual goals by determining what supports will be purchased with funding designated to them and by directing those supports. **Direct funding** is a way of managing individualized funding. It is funding that **goes directly to the person/family/network**. It is the approach that the Ministry of Community and Social Services is using for Passport.

THE IFCO VISION

1) Individualized/Direct Funding that is based on the following values:

- Citizenship
- Inclusion
- Self Determination
- Community
- Supports for a whole life, a look at the whole person

2) Individualized/Direct Funding that is based on the following principles:

- The person/family/network are the decision makers with the person's voice being honoured in the process
- Participation and contribution in community is a given – community as a first resource
- Dreams of the person and the strengths of the person, family and support network guide the process
- Planning and facilitation is a separate function in the system.
- Relationship building and networks of people are key.
- Funding is fully portable (can be moved within an area to a different agency, to another part of the province, out of province, from agency base budgets to direct, whatever is needed)

3) Individualized/Direct Funding that has infrastructure support options in place for people to experience success, including:

- 1) Independent Planning and Facilitation
- 2) Services and Supports that are especially designed for individualized/direct funding as follows:
 - Invoicing/financial accounting and accountability
 - Human resource support
 - Capacity enhancement, ie. training for families and personal assistants

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INDEPENDENT PLANNING AND FACILITATION

In the IFCO Vision Independent Planning and Facilitation:

- Is separate from direct service provision
- Is separate from access centres (single point of access)
- Is separate from funding allocation
- Is an infrastructure support to Individualized/Direct Funding
- Has a relationship with a provincial group that holds the values and offers value based training.

Roles of an Independent Facilitator

The role changes throughout the planning process. People will call on the facilitator as needed for various things. The varied roles include:

- Getting to know the person well
- Building relationships with the person, their family, network, and the local community
- Listening deeply - people say things in many different ways
- Providing information
- Linking with others (family networks, People First etc)
- Networking and relationship development, [building of support networks](#)
- Facilitating with the planning process
- Facilitating community connections in both formal and informal settings
- Building on the strengths, capacity and self determination of the person in order to create a good life
- Community development
- Recognizing people, their families and networks as decision makers
- Ongoing Monitoring/Evaluation with the person and their family/network
- [Brokering Roles:](#)
 - ***Negotiation***
 - ***Mediation***
 - ***Third Party Document/Contract writing***

A Framework for Individualized/Direct Funding

Moving toward full citizenship: A Separation of Functions*

INDEPENDENT Planning and Facilitation

Independent of direct service delivery; independent of access centres; independent of funding allocations; value based; strengthens and empowers people, families and support networks; leads to community participation and contribution

ALLOCATION DECISIONS

(Application with plan and Priority Panel Processes)

Accessible; equitable; allocations by government that are flexible, responsive to changing needs and fully portable; shifts control to the person, family and support network

AUTONOMOUS GROUPS

(People First Chapters and Family Networks/Groups)

Offer leadership in innovation & education; peer support; advocacy; provide a balance in the system and can safeguard new approaches with their voice

SERVICES AND SUPPORTS

Infrastructures that provide coordination of human resource support, financial accounting and capacity enhancement (ie. teaching families, personal assistants); person with their support network decides where to purchase this service (ie. from the community at large and/or service providing agency)

** Note: Moving toward full citizenship for all requires a framework that keeps the following functions separate: planning and facilitation; allocation; direct service; peer support/advocacy. This framework is different than a more traditional one where all these functions have historically occurred within one direct service providing agency. With an individualized/direct funding approach, having the options of 1) independent planning and facilitation 2) connecting with autonomous groups, and 3) purchasing direct supports as determined by person with family and support network would lead to success.*

Priorities for Moving Toward Full Citizenship

- providing information to people and families that brings awareness of more options
 - shifting control to individuals/families/support networks
- ensuring exposure to more life choices and increasing quality of life
 - building capacity in individuals, families and community