

INDIVIDUALIZED FUNDING COALITION FOR ONTARIO

August 2008

Written Brief to the **Standing Committee on Bill 77 - Legislation to enhance the social inclusion of people with developmental disabilities**

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ACCORD

The Individualized Funding Coalition supports the self-determination of persons with disabilities.

We believe that all people should have control over decisions concerning where they live, with whom they live, with whom they associate, and how they spend their lives.

In order to achieve this we recognize that Ontario must develop a system of funding whereby the person requiring assistance, supported as appropriate by family and/or significant others, has access to and control over the funds allocated for his/her supports.

Preamble

The Individualized Funding Coalition for Ontario would like to thank the Government of Ontario for providing an opportunity for Ontarians to offer feedback, insights and suggestions to the legislation currently being proposed for Developmental Services. It is an honour to be able to formally put forward a written submission and suggestions to the Standing Committee as part of the democratic process.

The Individualized Funding Coalition for Ontario opted to not put forward a verbal presentation at the Public Consultations earlier this month. This was a decision that was made for the following reasons:

- 1. IFCO had been an active participant in the Provincial Ad Hoc Working Group process** and fully endorses and supports the position paper that came from that work. We were aware that a number of presentations would be made on behalf of the Ad Hoc Working Group. We felt this work best represented the voice of many individuals and families as well as other provincial organizations from across the province. Please refer to the attached Position Paper from the Provincial Ad Hoc Working Group on Bill 77.
- 2. Many individuals, agency and organizational members of IFCO were planning to present over the course of the four days on their own behalf and would cover important key messages.** As well, many of our colleagues and partners who hold a similar vision were presenting. We knew that strong messaging would be repeated over the four days.
- 3. We were confident that the Standing Committee would hear from families, individuals and family groups who are keenly interested in direct funding and independent planning** which would then demonstrate a collective voice in support of IFCO messaging. In addition we believed that this government would hear similar things to indicate some consensus around new approaches for those who would choose this. *(Please note that we do understand that there are people and families who would not choose these approaches but also believe that direct individualized funding and independent planning need to be credible options for those who would do so.)*

Website: www.individualizedfunding.ca

4. **IFCO has produced a number of documents to assist with the transformation process over the last four years.** These have been previously provided to government. We wanted to bring attention to those items in writing to the committee as part of this submission.
5. **Finally, we believe strongly that a concise brief emphasizing a few key IFCO messages that would have the potential to enhance and enrich the legislation, as well as the ongoing efforts with regulation and policy development, was the best use of our volunteer resources and time.** We are optimistic that the Standing Committee will find our insights helpful as amendments are developed for Bill 77 and as this government moves forward with regulations, policy development and ultimately transformation.

Suggestions for the Standing Committee

The Individualized Funding Coalition for Ontario has written extensively on the topics of:

- Individualized funding,
- Independent planning & facilitation,
- The separation of key functions in a system and
- Portability of funds.

For the 'Individualized Funding Coalition', despite our name, funding is only **one** piece of the puzzle that ensures people with the help of their families and friends are able to create and/or choose the life they desire. Funding cannot be the only answer for people with developmental disabilities, nor can having all services and supports in one's life provided by the Ministry of Community and Social Services. A good life goes beyond funding and beyond 'Ministry' funded services.

Independent Facilitation & Planning

Living a good life, or living out the 'New Story', includes having friends, family and others - everyday citizens - brought together in a support network. It includes the use of everyday supports in one's neighbourhood, community, town or city. In order to achieve these things and more, it is critical that independent facilitation & planning be available for people and families when they reach adulthood and begin exploring options. It is also critical to have this kind of support on an ongoing basis. Facilitation support also assists people and those they trust with supported-decision making. Please see the second page of Appendix A where the role of independent facilitation & planning is described. Please see Appendix B which describes the rationale for it.

We are bringing this feature (and others) to the attention of the Standing Committee because there are a number of things that have been described in Bill 77 that would not typically be in legislation. In addition, the prescriptive nature of some of the legislation has left little room for independent facilitation & planning to exist in its present form. As such IFCO is proposing that independent facilitation & planning be offered and included in this new legislation as amendments are developed.

Separating Important Functions in the New System

One of the key things IFCO has written about is ensuring that independent facilitation & planning support is positioned outside of direct service delivery agencies and outside of the application or access centres to truly empower people. IFCO has gone on record over the past five years recommending that key functions/features in the system need to be separate from each other as part of a re-design of the system. This would move things away from an institutional model of

support. Bill 77 has the potential to achieve this with some consideration for amendments. Please see the attachment included with this document entitled Separation of Functions Framework. The proposed legislation gives a very prescriptive description of the Application Centres and their functions. IFCO believes that individuals and families need to be offered facilitation and planning by someone independent of the direct service agencies and also outside the Application Centres. We believe that without facilitation support, once the individual is deemed eligible, there is a likelihood of continuing to entrench the traditional approaches of the existing system instead of strengthening and empowering people and families through a facilitation & planning process. **Enhancing the legislation to include a section that refers to the importance of facilitation & planning and what that would look like outside the service system would move Ontario toward a system that can create and offer new and different choices.** It would lead to a transformed system, a new way of doing things and a new way of living for many.

Person-Directed Planning

The Individualized Funding Coalition for Ontario has noted confusion in the use of terms with regard to 'planning'. Firstly, we commend this government for using the term person-directed planning in *Opportunities and Actions* and in other writings – as opposed to the more commonly used term person-centred planning. When planning is done that is centred on the person, it can be done and has been done without the person present. People themselves have said, "I was not part of making that plan". When this government began to use the term person-directed, IFCO knew that having the person directly involved with their planning and making their own choices had become a priority for this government. However, person-directed planning does not mean that a person chooses from a list of possible services. Planning is always a process that unfolds over time and is not as simple as picking from a list.

IFCO would also like to go on record to clarify that person-directed planning is not the same as having independent planning and facilitation support – although the two process work well in tangent. **The deep listening that happens when a facilitator is independent of the systems and is working for the person results in high quality person-directed planning.** This is especially true when there may be a difference of thought between a person's family and themselves and even their service provider. When the facilitation support is independent, it has been our experience that the person's voice and ultimately their decisions have the best chance of coming through and being heard. This could be because there would be no conflict of interest on the part of a facilitator who is independent and no worries that there would be any repercussions for themselves in their position. **As a best practice, the Individualized Funding Coalition for Ontario believes that there needs to be the option of independent facilitation & planning to assist people with their person-directed planning and ultimately their person-directed living.**

Portability

Portability – described in *Opportunities and Actions* is a hallmark principle to citizenship and transformation. Much has been said about portability. Because it is not present in the legislation, and yet other things that would not typically be part of legislation are, the question has been raised: Will portability be part of a newly transformed system? The Individualized Funding Coalition for Ontario would ask that this principle be included as a key foundation to the new system.

In Summary

The Individualized Funding Coalition for Ontario would be pleased to assist this government in any further work around transformation. We would be willing to assist in areas where expertise or experience exists that may not be present within other organizations. Our membership consists of agencies, grassroots organizations, families and individuals who have had experience with transformative options and approaches over time. Some of these agencies also provide traditional supports, but have been successful in ensuring opportunities for people to experience social inclusion in the same way that *Opportunities and Actions* describes and in ways we believe this government is attempting to enable through its proposed legislation.

RESOURCES IMPORTANT FOR TRANSFORMATION

The following documents have been prepared specifically for transformation and are available on the Individualized Funding Coalition for Ontario web-site as follows:

- **Rationale for Independent Planning and Facilitation in Ontario**
Why MCSS Should Move Quickly to Implementation (2006)
- **Common Vision** - Newsletters
Part One and Part Two
- Transformation of Developmental Services:
Expanding the Possibilities for Citizenship (2007)
A **Signature Paper** developed by the Individualized Funding Coalition for Ontario
- **IFCO Statement of Principles** (in Plain Language)
- Creating a Good life in Community:
A Guide on Person-Directed Planning
- **Extra! Common Vision Extra!**
Government Published New Paper called 'Opportunities and Actions'
- **Investments that will Make a Difference**
Investing in system changes that are Responsible, Accountable, Equitable and Financially Feasible will have great Outcomes for People with Disabilities
- **Moving Toward Citizenship: A Study of Individualized Funding in Ontario**
(Research Study by John Lord and Associates)

*All the documents above can be found on our website:
www.individualizedfunding.ca*

Appendix A

Our Vision for a Direct Individualized Funding Approach in Ontario

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

BACKGROUND: Direct Individualized 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) Direct Individualized 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) Direct Individualized 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) Direct Individualized 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 direct individualized funding as follows:
 - Invoicing/financial accounting and accountability
 - Human resource support
 - Capacity enhancement, i.e. training for families and personal assistant

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 Direct Individualized 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** (*within independent planning and facilitation*)
 - ***Negotiation***
 - ***Mediation***
 - ***Third Party Document/Contract writing***

Our Vision for a Direct Individualized Funding Approach in Ontario – Appendix A, Page 2

Developed by the Individualized Funding Coalition for Ontario, June 15, 2006

Revised November 2006 using phrase 'Direct Individualized Funding' to reflect MCSS direction.

Appendix B

Rationale Summary Chart

Rationale for Independent Planning and Facilitation in Ontario:
Why MCSS Should Move Quickly to Implementation

Key Element	What Does It Mean	Key Principles
Independent planning and facilitation is a central infrastructure needed for direct individualized funding	<ul style="list-style-type: none"> • Individuals, families and support networks have access to a facilitator • Planning is value based on strengths, capacity and self-determination of the individual • Facilitators are skilled in network development, negotiation, and community development • Based on the values of self-determination and community 	<ul style="list-style-type: none"> • Individuals and their family/support network are decision makers • Funding for disability supports are individualized and portable • Community is a vehicle for change and the first resort for building a good life • Planning and facilitation are independent from service provision • Funding for disability supports is individualized and portable
Independent planning and facilitation is consistent with the MCSS vision of building citizenship	<ul style="list-style-type: none"> • Individuals with the support of the people they trust will ensure that they have a meaningful life in their community • Individuals will have an increase in the number of personal relationships 	<ul style="list-style-type: none"> • Individuals will be contributing to their neighbourhoods and community's • Community is a vehicle for change • Individuals and their family/support network are decision makers
Independent planning and facilitation is a vital service in times of complexity and diversity	<ul style="list-style-type: none"> • Building of individualized approaches to reach a diversified population • Assist people to create clarity out of complexity 	<ul style="list-style-type: none"> • Embraces self-determination • Builds innovation • Community is a vehicle for change
Independent planning and facilitation is an important way to address waiting lists	<ul style="list-style-type: none"> • Individuals and families would have a person to call on to do some meaningful planning while waiting • Facilitators assist in discovering possibilities 	<ul style="list-style-type: none"> • Embraces self-determination • Builds innovation • Community is a vehicle for change and the first resort for building a good life

Developed by the Individualized Funding Coalition for Ontario, November 2006 – Page one of two

Key Element	What Does It Mean	Key Principles
Independent planning and facilitation is a creative approach to community development	<ul style="list-style-type: none"> • Discovering a range of interests • Explore what's available in someone's community • How to "get around" the barriers and encourage partnerships 	<ul style="list-style-type: none"> • Individuals and their family/support network are decision makers • Community is a vehicle for change
Independent planning and facilitation is an effective strategy for crisis prevention	<ul style="list-style-type: none"> • Assists with mediation and plan with people who are at risk • Look at alternatives and assist people to make new partnerships 	<ul style="list-style-type: none"> • Individuals and their family/support network are decision makers
Independent planning and facilitation in combination with individualized funding has saved Ontario tax payers money	<ul style="list-style-type: none"> • Putting individualized funding in place coupled with the right infrastructures does not cost more money. 	<ul style="list-style-type: none"> • Increases quality of life and the person's contribution's to community • Community is a vehicle for change • Individuals and their family/support network are decision makers
Independent planning and facilitation has already been an investment of the Ontario Ministry of Community and Social Services in pockets of excellence around the province	<ul style="list-style-type: none"> • Successes have been documented • Pockets of excellence exist • Access to Individualized Funding and Independent Planning needs to be available in every community 	<ul style="list-style-type: none"> • Increases quality of life and the person's contribution's to community • Community is a vehicle for change • Individuals and their family/support network are decision makers
Independent planning and facilitation accessible to anyone who would choose it would result in real change in Ontario. Change will not come by continuing to do the same things we always have	<ul style="list-style-type: none"> • Independent planning and facilitation will create change • Time to move is now! 	<ul style="list-style-type: none"> • Individuals and their family/support network are decision makers • Funding for disability supports is individualized, flexible and portable

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