

**Individualized Funding: Definition and Elements**  
*February 2004*  
***A Key Message from the Individualized Funding WorkFest***

## Getting the Right Elements in Place

Individualized funding is one part of disability supports that people may require in order to have a more meaningful life in community. Individualized Funding is defined as different things by different people. Without a government policy, families are often confused about what it means and how they might access it. Special Services at Home is one type of Individualized Funding, yet many families are not aware that they can self-administer their SSAH contracts. Some families say it is hard work to figure things out, even when you have the funding. This is because Individualized Funding in Ontario now is a limited, patch-work of programs and initiatives that differ widely from place to place. Yet, Individualized Funding without agreed upon core values and principles can be unhelpful to the person and increase their vulnerability and isolation. There is a need for some clear definitions and an understanding of the elements that make IF work as a basis for a provincial policy. *In Unison*, the federal-provincial agreement, the *Ontario Round Table Report on Individualized Funding*, and related research documents have identified several key elements that now need to be shared, discussed, and incorporated into provincial policy. As we move to expand Individualized Funding, it is important that we get the right elements in place to insure that quality of life is enhanced.

### A Vision with a Clear Definition and Strong Elements

*The definition of IF is well understood and part of provincial policy.*

*The importance and inter-relationship of individualized planning, support, and funding is understood by families and government.*

*People can access planning support (a key element) that is focused on strengths and capacities.*

*Families understand that they can have control over resources for disability supports and that they can use those supports in flexible ways that meet their needs.*

*Government, families, and citizens with disabilities know the value of support networks to ensure quality of life.*

*Community services are not threatened by Individualized Funding, but encourage and support families who want to choose individualized supports.*

#### ***Elements and Components for Individualized Disability Supports***

- Values: full citizenship, participation, inclusion
- Principles: including consumer directed, family driven, rights and responsibilities
- Independent planning: with other infrastructures for individualized supports
- Mechanism for funding: individualized mechanism, with clear eligibility criteria
- Accountability: well understood
- Safeguards: enabling people and services to transition to individualized approaches.

***From In Unison and Round Table Report on Individualized Funding***

## Barriers that Block Clear Definition and Strong Elements

*Government does not understand the importance of key elements*

- independent planning not seen as critical
- research on elements is being ignored
- government language confuses families.

*Lack of consensus from some stakeholders on what Individualized Funding would look like*

- few service providers support the family vision
- traditional service approaches work against the elements
- government says only SSAH and some Foundations programs are IF.

*Government fears that Individualized Funding will be too costly*

- government thinks IF is only about money, but they have not done the research, since research shows it is cost effective and about elements as well
- government thinks accountability will be too difficult, yet Ontario Auditor General says families with SSAH have been very accountable
- government and agencies have not understood that IF is a choice and that only a percentage of families will actually choose it

*Lack of information about what is happening and what is possible*

- Success stories are not known.
- Some areas of the province have many of the elements in place, yet this is not known.
- Messages that do get out on IF are often not consistent.

## The Hope of Stories: The Elements Work for People

The stories of individuals and families show that the elements to make Individualized Funding effective can be put in place, and when they are present, they work for people.

- Issac from Windsor was extremely isolated and his family could not cope. None of the agencies were able to improve the situation. A facilitator from *Brokerage for Personal Supports* worked with Issac and his family, invited others in the community to assist, built a personal plan with Issac that made sense for him, and obtained funding to implement the plan. Issac's quality of life has improved immensely because of the planning, the personalized supports, and the individualized funding.
- Judy, a parent from Toronto, had her son Joey on waiting lists and in day programs when she became connected with HADD, a group of families with young adults with autism. HADD hired a facilitator to assist families like Judy's to develop an individualized plan and budget. Judy, Joey and their family invited others to join what they called a support circle. The circle assisted the family with the planning. Once the plan was developed, the HADD families convinced the government, applied to the Options program in Toronto and received IF. Judy says her son has thrived with good facilitation and individualized supports. Joey has talent for pottery and has shown his work. Joey's relationships have solidified and grown, and his self-esteem has greatly improved.

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## Strategies for Getting a Definition and the Right Elements in Place

*The following Strategies are designed to advance the thinking of all stakeholders, including government, in terms of the definition and elements that are part of Individualized Funding.*

1. The elements that enhance Individualized Funding will be widely understood, by:
  - Family leaders and the Individualized Funding Coalition engaging in dialogue and creating a definition that can be the basis for wider dissemination
  - Sharing stories of success with the right elements, in local communities and with government
  - Distributing newsletter articles and other communication related to the right elements.
  
2. The need for Independent infrastructures for life planning will be widely understood and in place in every area of the province, by:
  - A broad based communication strategy that shows that people need to have access to independent planning in order to build life plans, develop support networks, and to figure out what individualized supports are required.
  - Families and self-advocates working collaboratively with government to build IF and the appropriate infrastructures
  - Families and government utilizing the core values developed by the WorkFest and the principles established by the *Round Table on Individualized Funding* as the foundation for any collaboration.

### Outcomes by 2006

- A definition of Individualized Funding that is based on self-determination and citizenship will be well understood across all stakeholders.
- Newsletters and other communications vehicles will routinely have articles on individualized approaches.
- The elements that enhance Individualized Funding will be widely understood and experienced by many more families.
- Individualized Funding and independent planning will be in place in all areas of the province, with carefully developed infrastructures that meet local needs.
- Government and families will have worked collaboratively together to develop the approach to IF and the elements.
- More service providers will be encouraging and supportive of families that want to be engaged with individualized planning, support, and funding.