



# Individualized Funding Coalition for Ontario

***“Individualized funding interventions to improve health and social care outcomes for people with a disability: A mixed-methods systematic review”***

*Pádraic Fleming, Sinead McGilloway, Marian Hernon, Mairead Furlong,  
Siobhain O'Doherty, Fiona Keogh and Tim Stainton (2019)*

***What 24 Years of Experience from  
Around the World is Telling Us***

**Part Two**

*Presentation made at the May 5, 2021  
Ontario Independent Facilitation Network (OIFN)  
Reflective Practice Conversation*

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### ***Why we believe this systematic review is credible and relevant . . .***

Because 7 respected researchers:

- did a review of 73 studies on individualized funding
- used studies found between the years 1992 and 2016
- did a thorough review of such studies, research and working documents from different countries around the world including: Europe, United States, Canada, and Australia
- worked with data that involved 14,000 people

## *Why we like this systematic review . . .*

### *Because this study:*

- was published in 2019, making it recent work, and because it reviews historical work/interventions over a 24 year period
- **says there are benefits to individualized funding**
- notes that success involves having up front processes, mechanisms and functions to facilitate and support people with individualized funding
- **sees the need for transitional/educational work, and intentional investments**

## ***Populations included in the work***

“The population of interest included:

- adults aged 18 years and over receiving a personal budget, with any form or level of lifelong disability (physical, sensory, intellectual or developmental disability, level of mental health problem, disorder or illness, or dementia),
- residing in any country and any type of residential setting (own home, group home, residential care setting, nursing home, hospital, institution).”

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## ***What was learned and the benefits***

The evidence suggests positive effects of individualized funding with respect to quality of life, client satisfaction and safety.

Recipients particularly value: flexibility; improved self-image and self-belief; more value for money; community integration; freedom to choose 'who supports you'; 'social opportunities'; and needs-led support.

## ***Successful implementation from the programs studied . . .***

“Successful implementation is supported by strong, trusting and collaborative relationships in their support network with both paid and unpaid individuals.

This facilitates processes such as information sourcing, staff recruitment, network building and support with administrative and management tasks.

These relationships are strengthened by financial recognition for family and friends, appropriate rates of pay, and a shift in power from agencies to the individual or avoidance of paternalistic behaviour.”

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## ***Considerations for implementation in Ontario***

One of the criteria that was required for an individualized funding intervention to be included in the study was that the individual could ***“avail of ‘intermediary’ services or any equivalent service which supports them in terms of planning and managing how money is used over the lifetime of the funding period.”***

In other words, mechanisms to support the person with planning and their supports had to be in place for an individualized funding intervention/study to be included in the review.

In Ontario, independent facilitation\* would be seen by many as an essential component for successful implementation regarding a number of aspects the researchers identified in the previous slide. This would be particularly true for assistance with relationship and network building, shifting the power to the person, and addressing the ongoing and changing needs of the person over time.

*(\*Note: Different programs/countries will use different titles for this work, but in Ontario one of the most common roles identified to assist with network and relationship development, planning and facilitation, walking with people over time, helping budget and plan what individual funds could be used for, and ensuring people’s voice are heard, has been what is termed ‘independent facilitation’.)*

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## ***Current climate for reform and change in Ontario***

- The **Ministry of Children, Community and Social Services** is working on the reform of developmental services building on previous years of transformation. They have been looking at individualized funding approaches from around the world, including having had KPMG do a study of the National Disability Insurance Scheme in Australia.
- The **Ministry of Health** is in the midst of a big change in health care with the inception of Ontario Health and local Ontario Health Teams. The **Ministry of Long Term Care and Ministry of Health** are being called on to consider other options to support our elders and people with disabilities instead of continuing to invest and rely heavily on institutional models like 'nursing homes'. Examples of suggestions being made include: increasing investments to offer more hours of personal home care; expanding existing individualized funding approaches like Family Managed Home Care that currently exists to support people with disabilities/seniors living at home; and looking at small homes.

*There is a train of thought held by IFCO colleagues and allies: that with current systems espousing patient-centred care and person-centred/directed support, independent facilitators would have the right skill set, knowledge, and values to benefit people using individualized funding and supports at every stage of life - from young to old.*

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## *What's ahead . . .*

*“The World Health Organization estimates that 15% of the world's population live with a disability and that this number will continue to grow into the future, but with the attendant challenge of increasing unmet need due to poor access to health and social care (WHO, 2013).”*

*(Fleming et al., 2019)*

With this in mind, and based on results from the ‘systematic review’, one successful way to assist people living with ongoing disabilities and changing needs would be **an individualized funding intervention/approach that is responsive and offers independent facilitation as a viable option** to assist with support networks, and finding, creating and/or managing supports.

**Valuing independent facilitation as a credible career choice to assist people with their voice, choice, and autonomy in re-imagined systems of care and support would mean recognition for the role and financial investments.**

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### ***More from the systematic review . . . .***

*“Historically, the types of supports available to people with a disability were based on medical needs only. More recently, however, the importance of social care needs, such as keeping active and socializing, has been recognized.”*

*“There is now an international policy imperative for people with a disability to live autonomous, self determined lives whereby they are empowered and as independent as possible, choosing their supports and self-directing their lives.”*

(Fleming et al., 2019)

**Independent facilitation may just be one of the key components that will get people ‘there’ in Ontario – living autonomous, self determined lives . . . choosing their supports and self-directing their lives.**

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## Source

Fleming, P., McGilloway, S., Hernon, M., Furlong, M., O'Doherty, S., Keogh, F., & Stainton, T. (2019). *Individualised funding interventions to improve health and social care outcomes for people with a disability: a mixed-methods systematic review*. Campbell Systematic Reviews, 3.

Read the full review by downloading the PDF at: <https://bit.ly/3hJvxFX>

**Note: Below are two studies from Ontario that were included in the above research:**

Lord, J., & Hutchison, P. (2008). *Individualized funding in Ontario: Report of a Provincial Study*. Journal on Developmental Disabilities, 14(2), 44-53.

<https://www.johnlord.net/individualized-funding-in-ontario-report-of-a-provincial-study/>

Lord, J., Kemp, K., Dingwall, C., & Hutchison, P. (2006). *Moving Toward Citizenship: A Study of Individualized Funding in Ontario*. Retrieved from the IFCO website at:

<https://individualizedfunding.files.wordpress.com/2014/07/moving-toward-citizenship.pdf>

Thank You!

To read more about the 'systematic review' highlighted in this presentation and to check out the plain language version please go to our website:

<https://individualizedfunding.ca/individualized-funding-what-you-will-want-to-know/>