



# Individualized Funding Coalition for Ontario

Highlights of our historical work, and the evolutionary learning and understanding about the importance of planning and support mechanisms for people using individualized funding, and what is now commonly called independent facilitation.

## *A Walk Through Some History*

### **Part One**

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

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## Early milestones related to individualized funding and independent facilitation

### *Before the Coalition existed . . .*

- 1980 **Joshua Committee**, the first circle of support in Canada was facilitated and developed by friends Marsha Forest, Jack Pearpoint, Peter Dill and others to assist Judith Snow to leave the **institution** she was living in.
- 1981 **Order in Council** for the first government mandated/provided individualized funding in Ontario enabled Judith Snow to hire her own personal attendants and move into her own apartment.
- 1982 **Special Services at Home (SSAH)** program began so children with developmental disabilities could stay out of institutions thanks to some strong family advocates who pushed for change.
- 1980's **MAPS planning process** was developed; the creation of the PATH planning process a few years later. People being trained in facilitation.
- 1984 **NABORS** was incorporated with a focus on developing support networks. Principles of community, participation, self-determination.

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## *The 1990's*

**Early  
90's**

**People with disabilities, parents** like Gillian Chernets, **advocates and allies** like Beth French had been coming together and had created options that would support natural relationships, more control for people, and full participation for all. (CHORD, Courtyard & NABORS)

**1994**

**Individualized Funding Coalition for Ontario (IFCO) is birthed.**

Leaders in Ontario start meeting: people with disabilities, families, friends and agency allies. Over the next few years: the Accord is written, more allies, connections, & community development occurs.

**1998**

***Individualized Funding: First Choice Option for Developmental***

***Services*** paper is published by IFCO. The message: the current system of developmental services has unintentionally perpetuated an institutional approach to services and is not meeting current needs. The system needs to be accountable to people and recognise that every person needs to be supported equitably – as many are being left out. The paper states that: **INDIVIDUAL PLANNING AND FUNDING ARE ESSENTIAL.**

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*Words being used in the 90's to describe planning & facilitation functions and roles occurring in various places, projects, organizations, and among people with disabilities, families, friends & allies at the time:*

- Circle of Support (can assist person with planning )
- Support Circle development
- Facilitators
- Planners
- Person-centred planning
- Maps and Path facilitators
- Graphic facilitators
- Individualized planning
- Network builders
- Unencumbered planning
- Independent planner
- Broker
- Broker/facilitator
- Independent Facilitators

## Individualized Funding Symposium, Positioning for Change, October 1998

At the time of the symposium a number of pilots and activities regarding individualized funding were in place across the province.

135 participants from Ontario (individuals, families, advocates, service organizations, organized labour, government and academia) met to discuss individualized funding. Presenters from across the country and province were present. Discussions centred around the following 'building blocks':

- **person-centred planning**
- **personal support networks**
- **individualization of funds**
- **management supports**
- **community development and transitional supports**

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## ***Individualized Funding: A New Vision***

*Report written by Catherine Frazee, published in 1999*

### **Symposium themes included in the report:**

**Human Rights** - Past systems and services have created wounds.

*“Policies and institutions that reflect outmoded approaches must give way, with adequate transitional planning, to a process that entitles every disabled person to be supported in a manner that recognizes his or her unique interests, preferences, capabilities and aspirations.”*

**Self-determination** - The right to control what happens in your life.

*This is “the single most decisive factor in a person’s sense of happiness, contentment, well-being and fulfillment as a human being.”*

**Community Participation** - Exposure breaks down barriers.

**Individual Orientation** - Supports and dollars are not tied to buildings/agencies.

**Reciprocal Accountability** - Protocols and processes can be developed for the person to be accountable to the funders. Accountability to the person needed also.

**Competing Interests** - Management, labour, and people.

Adequate funding is needed for people with disabilities to hire individuals or services at a rate of pay that is fair and respectful.

(Frazee, 1999)

## *Under . . . Symposium Outcomes*

The report from the symposium published in 1999 lists six outcomes that were agreed to by the end of the three days. This one entitled **Readiness** will ring strong for many people, families, facilitators and agencies who have been part of pilot projects over the last 20 years.

**READINESS:** *“Participants are clear in their conviction that further studies and pilots are unnecessary. They know that there is a great deal of work to be done in transitional adjustments and community development. They are eager to get on with that work, in partnership with government and local service providers.”*

(Frazee, 1999)

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## ***Conclusion: Transition and Transformation***

“Coalition members eagerly await a green light from government to permit transition to go full steam ahead. While government has given indications of willingness to consider change, **there has as yet been no definitive, tangible commitment of political will and direction.**”

“A commitment to equitable support for individuals with disabilities requires fundamental changes in the way government resources are allocated and, in the way human energy is deployed.”

“Resources need to be invested at the front end of the process in order to assist local communities, families and other stakeholders to grasp the fundamental concepts of individualized funding . . .”

**“Transformation of society is the ultimate goal – transformation of the way people with disabilities are seen and understood, supported and included as full citizens and valued members of society.”**

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## ***1999: Work of the Ontario Round Table***

***Some Highlights from the Report published in the year 2000***

### **Continuous planning and implementation support**

Local planning for the individual should be unencumbered, and kept separate from service provision. Infrastructures, such as facilitators, are in place to assist individuals and their networks to plan and access their supports.

There must be criteria for any group or organization to be able to provide the infrastructure supports, including that the organization:

- be clearly separate from the service delivery system
- have the technical and training capacity
- have a philosophy and value base that is consistent with the principles

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## ***More Choice and Control for People with Disabilities Review of Individualized Funding, July 2000***

*Quotes from this publication . . .* The **most successful policies and programs have a blend of infrastructure supports** for individuals/families, an individualized funding mechanism, and a well understood approach to accountability.

Examples of Independent Infrastructure Supports: **Whether it is a broker, facilitator or network builder, there needs to be a person and an organization that can help individuals and families build their capacity and individualized plans . . .** And this person and organization must be free of conflict of interest from service providers and government.

Keeping infrastructure supports separate from the direct service system helps ensure that the supports will be individualized and person centered.

Facilitators not attached to the service system can put all their energy into supporting the person and family as opposed to concerning themselves with program and service issues.

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***2001 – 2004 Education and collaboration led by IFCO partners, people, families and allies . . .***

- ***Community Engagement 2001 – 2003***

Community Engagement took place across Ontario in local communities between the years 2001 – 2003. This followed the symposium, the Ontario Round Table work/report, and the review called, More Choice and Control for People with Disabilities.

- ***WorkFest 2004***

125 people, families, allies, partners met over a 3 day period. Key messages and vision statements were developed, and commitments to action were made.

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## ***Getting Facilitators in our Communities***

### ***A Key Message from the Individualized Funding WorkFest***

#### ***Vision: There is a strong Support Network of Facilitators provincially***

- Facilitators should not work in isolation – hard to be creative when working alone
- Facilitators should have connections locally, regionally, provincially
- Core provincial group should be experienced and independent
- Network will provide information to facilitators, also receive information from facilitators
- Linked with provincial groups – Individualized Funding Coalition, etc.

#### ***Actions:***

- Facilitators connected with each other after the WorkFest; they created a Terms of Reference
- Facilitator Forums were hosted by the Individualized Funding Coalition for Ontario

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## *2005 and 2006 – Parallel Work Happening*

**Facilitator Forums** were held in 2005 and 2006 about the value of facilitation and what would be helpful in the future. One of the goals was to develop a provincial network, community of practice and link local facilitation networks that were starting to develop.

***A Response to ‘Opportunities and Action, Transforming Supports in Ontario for People who have a Developmental Disability’*** was prepared by the IFCO Facilitator Forum group and submitted.

### **Common Vision for Real Transformation**

Representatives from four provincial organizations met together over a series of full days to develop a Common Vision that could be shared with the Ministry.

#### ***Foundational Values . . .***

- Citizenship
- Self-determination
- Inclusion and community engagement
- Individual and family empowerment

#### ***Shared Principle . . .***

Independent facilitation available for all individuals and families (who would choose this option) that is separate from direct service provision.

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## 2005 - Building a New Story Transforming Disability Supports and Policies, Re-Visiting In Unison

*Independent Planning and Facilitation means that individuals and families have access to a facilitator that listens deeply, provides information, and assists with planning, network development, negotiation, and community development.*

*This ongoing planning and facilitation support is based on the strengths, capacities, and self-determination of the person.*

*Research shows that individuals and families benefit from having unencumbered, ongoing facilitation and planning support and that such support provides “value for money.”*

*Separating planning from service provision creates a powerful building block for transformation.*

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## 2006 - Moving Toward Citizenship: A Study of Individualized Funding in Ontario

*Principle investigator, John Lord.* Four projects/sites from Ontario were chosen; 130 people with developmental disabilities and their families who used individualized funding from 2001 – 2005 were part of the study. This study demonstrated that costs for individualized funding may be similar to conventional supports, but quality of life outcomes are usually much better.

Below is what we learned from this study about facilitators as it relates to individualized funding support:

### **The Facilitator is Key to Individualized Funding**

- Positive Views of Facilitation: Facilitators at all four sites played major roles in the lives of individuals and their families.
- Interviews with families confirmed and gave depth to what facilitators say they do. All families were very positive about the importance and helpfulness of their facilitators.
- **The strength of this theme gives credence to research that suggests that independent planning and facilitation are an essential infrastructure with individualized funding.**

(Lord, Kemp, Dingwall & Hutchison, 2006)

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## 2006 – 2014 More parallel work . . . .

### Birthing of the Ontario Independent Facilitation Network (OIFN) from IFCO

From Facilitator Forums hosted by IFCO to the Modelling Community Change Project in 2008: it began with a goal to hold provincial facilitator forums, and grow the community of practice – all leading to naming of the network and its independence/autonomy from IFCO. Following the Modelling Change project in 2011 were other grants and project work for OIFN, and then a 4 year Demonstration Project. All of this history is available on the OIFN site.

### IFCO 'listening' and continuing its writing

Papers, briefs and government submissions by the Individualized Funding Coalition for Ontario that included references to independent facilitation continued as follows:

- November - 2006 Rationale for Independent Planning and Facilitation in Ontario
- January 2007 - The Signature Paper, Transformation of Developmental Services
- Winter 2010 - IFCO Direct Funding Report
- September 2012 - Report on Direction of Independent Facilitation and Person-directed Planning
- November 2012 - Feedback to Passport Changes
- January 2014 - IFCO Submission to the Select Committee.

**In 2012, following a gathering of people and families in Ontario the paper called: *A Report on the Direction of Independent Facilitation & Person-directed Planning in Ontario* was submitted to government. Part One of that document outlines what people and families said about independent facilitation as a crucial safeguard in their lives.**

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## **2015 – 2021 Wrapping up . . . . .**

- By 2015, a number of leaders and facilitators with IFCO shifted their efforts to the important work of the OIFN Demonstration Project funded by the MCCSS. People, families and facilitators were also involved in their own communities in local project work.
- **2015-2019: IFCO continued with representation at the Developmental Services Partnership Table and the Provincial Housing Task Force until 2018/2019 when the work of those tables ended. Also notable were some local Housing Task force projects around the province that involved people/families/partners (also long-time IFCO members) who with individualized funding, facilitation and innovation demonstrated success.**
- 2018-2020: In 2018, Two Straight Talk events were held with people, families, and allies experienced with individualized funding and facilitation to garner info for the future. By the end of 2018 and into 2019, local and provincial lobby efforts were in place to try and secure ongoing funding for independent facilitation. People, families, and partners participated in their locales. 2020 was quiet for IFCO with efforts mainly on the website.
- **2021: Today IFCO continues to make its resources, all still relevant, available on the website as a repository to draw from. Reports, videos and research about individualized funding approaches from other parts of Canada and elsewhere in the world are also available on the site. Part Two of this May 5, 2021 presentation highlights learnings from a ‘systematic review’ of research studies about individualized funding and successful implementation over a period of 24 years . . . .**

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Thank You!

To check out the resources referenced in this presentation and others please go to our website:

<https://individualizedfunding.ca/>