

Community Living Ontario Policy Snapshot

Learning from Direct Funding in Alberta and British Columbia

Summary

Alberta and British Columbia have long-standing and well-developed direct funding programs for people who have an intellectual or developmental disability. As Ontario develops its own stream of direct funding, it is important to learn from the experience of other jurisdictions.



The Western Canadian Approach to Direct Funding

Every province to the west of Ontario has made direct funding available for people who have an intellectual disability. BC and Alberta in particular have a long and well-developed history of direct funding, and both make it possible for people to receive support via either (a) block-funded agency services or (b) direct funding. Canada's westernmost provinces offer valuable insights, since their programs are quite similar to what is outlined in Ontario's [new developmental service strategy](#), which states:

We want to give people greater choice and flexibility to better meet their needs. This means introducing different ways people can get supports. People could continue receiving supports from service providers or choose to manage their funding directly. It could also mean a combination of both.

Individualized Funding in British Columbia

In British Columbia, any adult eligible to receive funding via the Community Living BC (CLBC) crown corporation may access the province's Individualized Funding program. Anyone receiving more than \$6,600 through the program must have a representation agreement that identifies an agent with [legal](#)

[authority](#) to act on the person's behalf (it is worth noting that there are major differences between BC's representation agreements and Ontario's system of substitute decision-making).

People are eligible for the same amount of funding to which they would have access through a service agency, with funding levels based on need, the estimated cost of supports, and available [funding](#). It is possible for people – with support from family members or other representatives as needed – to manage their own finances, develop a microboard, or work with a Host Agency that manages funds [in consultation with them](#).

As of 2019, [1,152 people](#) accessed direct funding for support services (not including respite) in the province, accounting for 6% of people receiving support through CLBC. The province also offers direct funding to families for respite services.

BC is well known for its use of microboards, i.e., groups of at least five people that join together with a person who has an intellectual disability to form a non-profit society. The society then assists the person to create a life plan, advocate for what they need, and [manage funds and services](#). Microboards are [involved in](#) about 20% of individualized funding relationships with CLBC; direct-

funded respite accounts for 65% of cases, and direct (non-microboard) and host agency funding make up the remaining 15%.

The BC system of individualized funding is likely the most well-researched and evaluated in Canada. In line with other studies of the approach around the world, a [2013 UBC-based inquiry](#) concluded that “individualized funding methods can cover virtually all services supported by Community Living British Columbia, at a cost relatively equal to or lower than traditional block funded services.”

Family Managed Services in Alberta

In Alberta, the [Family Managed Services](#) (FMS) program was launched in 2006, and allows for a person, their family or a person close to them to manage the delivery of services by hiring staff directly or by obtaining supports through an approved service provider. The program built on decades of below-the-radar direct funding to families of people who have a developmental disability [beginning in the 1970s](#).

Family Managed Services (FMS) funds are most often administered by family members; however, it is also possible for non-family members of a person’s close personal network to take responsibility for administration. As in many other direct funding programs, these individuals take on a significant degree of responsibility for the prudent use of funds. This can include acting as an employer if services are not purchased from an approved service provider, and developing and maintaining an Individual Support Plan. Despite this administrative burden, use of the program [grew by 132%](#) between 2010 and 2018, and approximately 10% of people (about [1,200 people](#)) supported by the PDD program access FMS.

Alberta has developed a substantial infrastructure to support direct funding. The province provides a broad set of resources that balance freedom to innovate with the need for monitoring. For example, the provision for three-year contracts allows people and families to plan predictable and consistent long-term support. The

administrative process incorporates a consistent [government oversight](#) role – without the bureaucratic micromanagement that can bog down agency care – and resources to address safety concerns.

It is notable that FMS is available to people who have ‘complex service needs,’ defined as people “who pose a significant risk, and/or are destructive to themselves, others, or property,” and who may have had organizations refuse to provide services because of such behaviour. There is a clear recognition of the need for specialized supports in such cases, and a willingness to work with people and families over the long run.

Our Recommendations for Direct Funding in Ontario

In our recent document, [Building a Full Life & A Home of One’s Own in the Community](#), Community Living Ontario makes a number of recommendations for direct funding in Ontario, inspired by programs in BC, Alberta, the United Kingdom, and the United States. Our recommendations include the following:

1. Offer a direct funding option to all adults who are eligible for developmental service funding through the Ministry of Children, Community and Social Services, regardless of the level of assessed need for services and supports.
2. Direct funding agreements will include all items available via block-funded agency agreements and the existing Passport program. The cost of services and supports set out in the plans of people supported must be equal to or lower than those provided via block-funded agency agreements.
3. Plan managers (i.e., people themselves, family members or close personal friends, or transfer payment agencies) will be approved using clear and transparent guidelines, and will develop and submit annual individualized plans with clear goals and outcomes. Plans must address:
 - A detailed outline of services and supports that will be purchased

from agencies and/or individuals (including planning supports),

- Additional out-of-pocket funds to be contributed by people and family members (note that these should not lead to reductions in program funds), and
 - The role of in-kind and unpaid supports from personal support networks (often referred to as 'natural supports').
4. It is recommended that more intensive plans (e.g., requiring more than \$50,000 in program funds) require the engagement of facilitation and management support.
 5. Advance funding will be made available on a quarterly basis, with a requirement for regular financial reporting to the funding/oversight agency.
 6. To support fairness across employment situations, minimum rates for the payment of Personal Support Workers and other staff will need to be established. Funding levels must account for inflation, coverage of group health benefits, liability insurance and membership in relevant professional bodies.

Community Living Ontario is pleased that the Ministry of Children, Community and Social

Services has embarked on the development of a direct funding program in our province. This is a long-anticipated development among people and families, and it is crucial that we learn from other jurisdictions and get it right the first time.

For more information on CLO's positions on direct funding, please see our previous policy snapshots, [A Closer Look at Direct Funding](#), and [Lessons from Australia's National Disability Insurance Scheme](#).

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Community Living Ontario is a non-profit organization that advocates alongside people who have an intellectual disability, their families and agencies that support them across the province.

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