



**SASKATCHEWAN
ASSOCIATION FOR
COMMUNITY
LIVING**

**Individualized Funding and
Individually
Funded Services
Demonstration Project**

**Business and
Operations Plan**

Working Document - May 8th, 2007

Table of Contents

Executive Summary.....	3
1. Project Background, Current Situation, Situation Analysis.....	4
2. Mission, Vision, Principles, Fundamental Roles, Key Outcomes.....	5
3. Project Description, Operating Plan, Community Sites, Definitions, Business Model.....	7
4. Project Requirements, Participant Table Contributions, Developmental Schedule.....	8
5. Marketing and Implementation.....	10
6. Governance.....	10
7. Evaluation, Viability, Relationships, Resiliency.....	11

Appendices

A. Contributions Table	E. Project Participant Circle
B. SACL Role Definition	F. Community Sites Themes
C. SACL Support and Development	G. Approaches Needed
D. SACL Staff & Local ACL Role Definitions	H. Advantages of IF and IFS
	I. IF/IFS Information Sheet

Executive Summary of Plans and Intentions

Beginning in April 2007, the Saskatchewan Association for Community Living (SACL) will take a lead role and proceed with the implementation of a Demonstration Project on Individualized Funding (IF) and Individually Funded Services (IFS) in order to facilitate, examine and develop viable living and service options and opportunities, for persons with intellectual disabilities in Saskatchewan.

Individualized Funding has been defined for the purposes of the Demonstration Project as an allocation of public money, directly to an individual to meet their disability related needs. Two fundamental characteristics are present: The funding amount is determined by direct reference to the individual. The individual, who is supported by their personal network, determines how the funds are spent. Individually Funded Services are services which are built around the needs of the individual and are contracted to and delivered by a service provider.

SACL will offer Independent Planning Support (IPS) through the provision of information, advise, procedural assistance and coordination to individuals and families, independent from service providers and service funding decisions, to assist them to identify and implement Personal Support Plans (PSP).

Assistance will be provided by SACL to identify needs and options for individual support, and to implement plans. The intent will be to identify supports and roles that will further build the capacity of a person's network and community in order to achieve maximum independence. Encouragement and support will be provided to service providers to promote choice and innovation and to develop or expand current options.

Collaboration with community stakeholders at various development sites will be ongoing to explore and inspire new and innovative ways to provide support and services. The Demonstration Project will feature the development of an adaptive community model to accommodate meaningful solutions for persons seeking IF and IFS, as well as recommendations for adaptations of policy and programs to support the application of the model to the community site. SACL has identified Meadow Lake, North Battleford, Moose Jaw, Humboldt, Prince Albert and Regina as initial community project sites.

The concept calls for inter-organizational collaboration, cooperation and coordination in order to fully change attitudes to support inclusion and explore solutions to meet the multiple needs of the persons with intellectual disabilities living in our communities. An Advisory Team will guide the implementation and development of the project. Contribution agreements and roles will be detailed as partnerships evolve. The level and ability to commit to the project will be determined by each member.

The model will be evaluated in terms of effectiveness of both means and ends. Learning will occur throughout the tracking of inputs and impacts on persons and families, as well as impacts and implications for community stakeholders and advisory member agencies. The long term viability and implications for this model will be determined.

1) Project Background

People with disabilities have experienced a long history of social exclusion and financial marginalization, often coupled with the imposition of mandatory, restrictive and paternalistic methods of service provision. The underlying philosophy that guided service provision has changed in recent years from the medical/deficit protective model to one of community inclusion or social model. This evolution of ideas and education of the public and institutions has led to an increased desire and demand for individualized funding, participation in policy development and control over services.

According to Barnes (Review of Disability Studies, 2005) "in a recent study of various consumer driven organizations that represent people with cognitive disabilities, there is recognition that we are seeing a paradigm shift." Specifically there has been a shift from the more traditional rehabilitation-oriented services to community based, consumer driven approaches. This new paradigm emphasizes quality of life issues, consumer control and choice, empowerment, self determination and an independent living philosophy."

Choice, success, relationships and personal contribution to community are becoming the new expectations for young adults who have grown up in their family home and have attended school in regular community settings have for themselves. These are also the expectations for parents who have fought for inclusion.

For the past ten years, the Federal Social Development Partnerships Program (SDP) has provided funding to each province and territory to facilitate a shift towards the full inclusion of people with disabilities in the life of the community.

In Saskatchewan, the project has been the Grassroots Alliance, managed by the Saskatchewan Association for Community Living and supported by the Saskatchewan Association of Rehabilitation Centers (SARC), the Department of Community Resources: Community Living Division and People First.

In 2005/06, SDP promoted a shift in focus to systemic change which produced, through community consultations, a significant body of data on community conditions and the needs of persons, as well as effective practices that support, and in some ways, predicts the current situation we face and plan for development.

SACL in recent years has taken a leadership role to invest significant resources in consulting with a wide variety of stakeholders, and in studying, researching and documenting these needs, conditions and practices. (*Community Consultations Report 2005; Putting People First 2006*).

Current Situation

A number of forces have converged to create conditions and opportunities that mean substantial changes must occur in the relationships between persons with intellectual disabilities and their stakeholders in Saskatchewan.

Heightened attention has emerged that persons with intellectual disabilities are increasingly challenged to a fundamental right to live with dignity, respect, quality of life, to be self-determining, to be fully included in community life and to access the supports to be fully included as a citizen.

It is evident that a number of initial emergent themes and presenting systemic issues have surfaced in relation to the current delivery system in Saskatchewan that heightens awareness and forces for change. Seven key issues would include:

- Saskatchewan families and persons with intellectual disabilities are increasingly challenged by the existing menu of programs and services that restricts choices and options in the access to and control over services and supports.
- Many families and persons with intellectual disabilities find the existing service delivery system intrusive and unresponsive to new ideas and their requests.
- Many existing programs and their policy frameworks are targeted to specific populations and needs. As a result, many families and persons are excluded from the supports they require in order to strengthen their capacity.
- Equity in the application of finite resources is inconsistent. Many people are over serviced, some under serviced, and there are those that are unable to receive services.
- Growing acknowledgement there are limited services and resources available and widening gaps to those persons attempting to access them.
- Quality of Life indicators have not influenced policy and desired outcomes.
- The capacity, ability and willingness of communities to adapt to an IF/ IFS mode.

Situation Analysis

- The concept of IF and IFS has been researched and demonstrated, and a feasible model has begun to emerge for project development by SACL in willing and able communities.
- Relationships with possible partners, families and individuals have emerged with offers of support, participation and readiness.
- There is some evidence of interest and support by the provincial government in social service, housing, health and education areas.
- There is significant interest in project outcomes, observations and community dialogue from a number of stakeholders and sectors.

2) Mission

The SACL Project on IF/IFS exists in order to facilitate, examine and develop viable living and service options and opportunities, for persons with intellectual disabilities in Saskatchewan. These options and opportunities will provide pathways to self-determination, citizenship and membership in the community through partnerships with professional, business, family, government and community sectors.

The Vision

In this environment we see persons with intellectual disabilities, families and personal support networks, actively participating and guiding their own planning process; choosing supports, services, programs and employment options from a wide range of opportunities; enhancing their own capacity in order to make meaningful and successful transitions to inclusive community life.

Core Principles

Eight core principles provide the assumptions and value framework intended to guide the IF concept. These principles are:

- People with disabilities and their networks are trustworthy and make appropriate decisions.
- Funding is based on a plan developed by the person and where appropriate, their network, that identifies disability related needs.
- Individualized funding is portable.
- Support is available to assist individuals and families to use and manage IF.
- The funder must justify why “identified needs” are not eligible for funding.
- Individuals have access to a dispute resolution process.
- Requests to renegotiate funding due to changing needs and circumstances are met in a timely and responsive manner.
- Access is equitable for eligible individuals and families, subject to limits imposed by the fiscal resources and mandate of the funder.

Guiding Principles

Nine main guiding principles would include:

- Respecting the rights of people.
- Safety, security and well being of individuals and families.
- Community as the vehicle for change.
- Individuals, families and/or circles of support are the decision makers.
- All relationships are founded in mutual respect and trust.
- Sustainable supports will be developed by introducing flexibility, increasing choice and stimulating innovation and creativity.
- The focus will be on the prevention of crises.
- Seamless, straightforward access to flexible and responsive supports.
- Standards of financial performance are consistent with government’s financial security and reporting requirements.

Fundamental Roles

Three fundamental roles provide guidance to essential parameters to working with individuals, family and community:

- Providing assistance at the community level, including independent planning support, to individuals and families who are receiving, requesting or requiring community living and income assistance support.
- Managing the means of providing support to people who require community living services.
- Stimulating, encouraging and supporting innovation and creativity at the community level in order to change the way communities respond to people with a disability.

Key Outcomes

Essential are five outcomes in response to the project deliverables:

- More flexible supports and options targeted to meet individual needs.
- Supporting individuals and families to make decisions that maintain independency.
- Effective use of small amounts of flexible funding made available from limited resources.
- Greater community involvement in developing more appropriate, cost effective and sustainable person focused solutions.
- Cooperative planning and collaboration that takes advantage of existing community capacity and enhances an interest in building greater capacity.

3) Project Description

Beginning in April 2007, SACL will offer Independent Planning Support (IPS) through the provision of information, advise, procedural assistance and coordination to individuals and families, independent from service providers and service funding decisions, to assist them to identify and implement personal support plans.

Assistance will be provided to identify needs and options for individual support, and to implement plans. The intent will be to identify supports and roles that will further build the capacity of a person's network and community in order to achieve maximum independence. Encouragement and support will be provided to service providers to promote choice and innovation and to develop or expand current options. Collaboration with community stakeholders at various development sites will be ongoing to explore and inspire new and innovative ways to provide support and services.

Project Operating Plan

The SACL leadership team has identified role definition, support and development requirements. The team will be developing a comprehensive schedule of activity for implementation for this project and its relationship to other activities at the community and provincial levels. SACL and local ACL staff and identified community sites beginning in the spring of 2007.

Community Sites

At this stage of development and commitment, SACL has identified Meadow Lake, North Battleford, Moose Jaw, Humboldt, Prince Albert and Regina as project sites. (*Please see Appendix F for Parent Comments*)

Project Definitions

Individualized Funding - an allocation of public money, directly to an individual to meet their disability related needs. Two fundamental characteristics are present: The funding amount is determined by direct reference to the individual. The individual supported by their personal network, determine how the funds are spent.

Individually Funded Services - services which are built around the needs of the individual and are contracted to and delivered by a service provider.

Block Funded Services - a program or service is administered by a service provider and funded through the government for a certain number of person spaces which are filled by eligible individuals.

Business Model - The business model case articulated by the various interests to date is a collaborative model with advisory intentions. No partnership governance structure will be explored at this stage of development that would facilitate a model of decision-making, agreement on goals and shared risk, resources and reward. The risk and contributions at this stage are vested with SACL.

A number of participants will commit significant expertise and support that will be essential to the success of the project. All participants differ in their respective environments, perspective, intentions and interests. Diversity is experienced in the profile of participants from public and private entities, non-profit sector, family and individuals.

4) Project Requirements

To operate the project beginning in April 2007 the following will be required:

- Adaptive roles for SACL staff and local ACL's.
- Adaptive community model of engagement, development and capacity assessment. (McKnight/Kretzmann/Vandenberg)
- Adaptive community sites.
- Affirmed relationships with individuals and families.

Participant Contributions

SACL - The Saskatchewan Association for Community Living -The Grassroots Alliance has taken the initiative and has provided 10 years of attention through research, concept development, and public consultation. It has provided resources for partnership and model development, budget and grant allocations for staff time, support to families and community. SACL will take the lead role on this initiative.

Community Living Division - the division is an interested party prepared to act in an advisory capacity as the concept and plan develops.

Income Assistance Division - the division as an interested party is prepared to act in an advisory capacity to guide the pilot project as the concept and plan develops. This would include providing detailed information on current government policy/programs/process that may be relevant to the development of a workable pilot, and also recommendations for changes to the same that may be required in the future.

Cognitive Disabilities Strategy - has agreed to bring consultation through research, experience, and concept development. It has expressed interest in being an active partner as the concept and plan develops.

Advanced Education and Employment - the Programs Branch, specifically the Special Needs Program Unit, supports the concept of IF and as an interested party, is prepared to participate and act in an advisory capacity as the concept and project develops.

Health - the Provincial Community Care Program Branch has expressed interest in being an active partner and willing collaborator in the development of the concept. It has 8 also offered to be actively involved in lending experience and learning to the design and adaptation.

Sask Learning - the Children's Service Unit supports the concept of IF and IFS and has agreed to participate at the table to explore developmental elements and lend support and consultation to the project as it progresses.

Community University Institute for Social Research - through internship will provide the social research capacity to conduct the analysis of the concept and various models of IF and IFS. This would include an assessment and application of each model to the Saskatchewan experience.

Saskatoon Housing Authority - may contribute housing in Saskatoon if appropriate units are available. It has expressed interest in being an active partner as the concept develops. This could include consultation on the development and acquisition of housing units and may provide links to housing authorities in other jurisdictions.

Saskatchewan Alternatives Initiatives - supports the concept of Individual Funding and Individually Funded Services and will participate at the advisory table to explore the developmental elements to which they can lend their expertise and support.

Office of Disability Issues - supports the concept of IF and IFS for persons with intellectual disabilities and have offered to participate to provide support, consultation and linkages as the project development evolves.

Regina Residential Services Co-Management Committee - has expressed interest in participating in the project development and is also willing to provide collaboration, support, information and technical experience on Self-Managed Projects.

Family-Laurie Larson (Biggar) and Vivian Thickett (Meadow Lake) - have agreed to participate in an advisory capacity and bring knowledge and experience to the table. They have also agreed to promote the concept and facilitate linkage with families and stakeholders within their respective communities.

Individual - Dwaine Scott (Saskatoon) brings his personal experience of living with a disability. Dwaine has received supports from a variety of service mechanisms.

Developmental Schedule

Activity	Timing
Business Plan Development	Oct 1/06 - March 12/07
Finalize Participant Commitments	Jan 25/ 07
Adopt a Governance Model and Business Plan	March 12/07
Finalize Operations Plan	March 22/07
Project Launch and Conference	March 30/07
Staff Development, Site Visits, Resourcing & Outreach	April 1 – June 30/07

5) Marketing and Implementation

There are a number of distinct pieces of the plan which will require focused attention to communications and marketing to support the identified outcomes for the project.

1. The Concept of IF and IFS.
2. SACL Role in facilitation and community capacity building.
3. Individuals, families and communities ready to move to IF.
4. Supportive participants and stakeholders in the venture.

The principle stake in the effectiveness of reaching the stage of implementation is that of SACL. SACL wishes to have a positive impact on individual and family choices, stakeholder support for an innovative approach to develop creative options and a willingness to explore the potential of sustained relationships and partnerships at the community level.

SACL is committed to openness and transparency and will regularly communicate about issues of interest to community partners and stakeholders using a variety of means including their regular newsletter the Dialect. Management and staff will also be available to make presentations about the project and its work.

The project will also require the effective marketing, information translation and support from participants at the Advisory Table and their respective systems. Key messages will need to be developed as to the participants' involvement with the project, role and profile within the community site.

6) Governance

SACL promotes a strong belief that community members and particularly those affected by an intellectual disability have an important role to play in determining how the project will be governed and delivered.

The project may generate some pressures for a different approach to governance. At this stage there is flexibility for more of a participatory style in the development, design and implementation of the project.

SACL has made the decision to delegate significant responsibility to their leadership to manage and direct the project. Roles have been adapted to ensure the desired outcomes are reached. The commitment, responsibility and scope of involvement for the project has resulted in clear parameters and role definitions. (*Please see Appendix D*)

The decision-making ability will rest solely with SACL leadership at this stage. Consultation will be sought and frequent status reports will be brought forward to the Advisory Table.

7) Evaluation

The SACL Project is one form of IF development in the province. A number of values and assumptions are associated with the venture that will form the basis of learning throughout. The innovative and creative nature of the SACL project suggests the importance of a developmental approach to the evaluation.

There will be obvious indicators of success with individuals and families related to planning and support. However this venture is also intended to discover the value of intentional intervention through inter-organizational collaboration, coordination and cooperation.

The underlying notion assumes there are incentives to collaborate and mutual net benefits to all parties to invest away from independent and uncoordinated activity. The notion also assumes the changing patterns of interaction within and between stakeholders creates capacity and innovation.

Essential to the evaluation will be data for SACL and table participants as to the requirements from a policy and program framework to sustain the venture.

Engagement by CUISR with all stakeholders to develop a data collection and reflective learning approach will be encouraged and supported by SACL.

Viability Issues

The project has been premised conditionally from inception on the available support and levels of commitment, opposing or mitigating forces, anticipation and planning for risks, resistance and resilience. Long standing traditions and methods of conducting business will be challenged and will surface many of these elements. These issues will be seen as political, professional, financial, community, family and individual challenges to the existing order.

The SACL project is piloting a collaborative change within a very large external environment with many fundamental issues already in place and many complex sets of relationships. There are many factors and variables that may create issues at any point in time as the process evolves which may cause the project to drift or shift in focus and intent.

It will continue to be important for the SACL leadership to maintain focus on how the environment will be adapted to meet the needs of persons with intellectual disabilities, and what will be the approach to change these conditions.

Relationships

It will be important to maintain the working relationships at the advisory table, but also to map out other stakeholders and interests who will support the project and work in this area. Work has been initiated by SACL to develop role assignments and continued planning to engage individuals, family and community sectors. Potential funders have also been engaged at the Advisory Table.

Resiliency

Projects such as this will face a variety of challenges from questions regarding the value of the concept; to access to needed resources. Planning to engage stakeholders to fully adopt inclusion and to develop, support and sustain creative options and solutions, will be very important.

Appendices

Appendix A

Contributions Table

Activity	Requirements	Contributors	Quantity, Time, & Cost
Enviroscan	Human resources, time, staff, contractors.	SACL staff hrs Contractor \$	2 SACL staff X \$ Contractor
Concept Research & Development	Literature review, outreach, meetings with partners, families, stakeholders, government, CBO's.	SACL staff hrs CUISR Contractor \$	1 SACL staff Match \$\$\$ X \$ Contractor
Business Plan Development	SACL Leadership contractor.	SACL Contractor \$	2 SACL staff X \$ Contractor
Concept Promotion & Animation	Materials, meeting sites, partnership development, contacts, presentations, conference.	SACL Contractor \$ UBC	4 SACL staff X \$ Contractor Time
Operations Plan	Implementation, schedule, budget/resources, participants, site.	SACL Table Contractor	9 SACL staff Time X \$ Contractor
IF/IFS Model	Best practices, analyze, application, model development, outputs/outcomes, report.	CUISR Contractor \$ SACL	\$9,175.00 X \$ Contractor 1 SACL staff
Advisory Table	Attend meetings of the Table. Provide consultation to the Project.	Table Members SACL	X \$ 11 Members X \$ for SACL Staff and Participants

Appendix B

SACL ROLE DEFINITION

Partnership Development and Relations

- 1) Contact and approach potential participants/partners and maintain an inventory.
- 2) Establish a community dialogue on IF/IFS.
- 3) Establish community partners and maintain a communications network.
- 4) Facilitate local partnership/stakeholder meetings and facilitate a community wide IF/IFS partnership development plan.
- 5) Align community partnerships/support systems with the IF concept and case.
- 6) Explore the feasibility of a local community governance/advisory model.
- 7) Establish and maintain IF development and partnership relations beyond the local community of interest.
- 8) Facilitate Division level meetings on policy, program delivery issues and their relationship to the IF initiatives/cases.
- 9) Facilitate Division wide partnership development at the Central Office and Regional Service Level, including the development of policy and agreements of service and understanding.

IF/IFS Concept Development

- 1) Identify target markets and participate in capacity building for local community stakeholders and partners.
- 2) Build community capacity to address individual needs.
- 3) Build SAACL and local ACL capacity to address community and individual needs.
- 4) Identify the potential professional development needs of the sector in order to actualize IF/IFS.
- 5) Provide information, referral and research to support professional development.
- 6) Provide in service to support staff.
- 7) Identify agencies/organizations/individuals with services/resources/skills to align with IF/IFS.
- 8) Identify local leadership and champions of the cause.
- 9) Continue to align and define roles in relation to IF/IFS development.
- 10) Provide examples of similar models and experiences.
- 11) Identify a general timetable for the development and implementation of each community site and IF case.
- 12) Determine the population profile and the number of potential IF cases at each community site.

Accountability

- 1) Determine outcomes and performance measures.
- 2) Facilitate communication regarding accountability between local community partnerships and central systems.
- 3) Identify specific targets in accomplishing local community concept development.
- 4) Provide assessment mechanisms and common success indicators.
- 5) Report to the Advisory Team and participants on the identified target areas.
- 6) Contract personnel to develop a business plan to each participant program outlining critical outcomes for each table participant.

Finances

- 1) Identify the cost and estimates for each local IF proposal.
- 2) Establish connection between required resources to meet the case needs and the local community service sector.
- 3) Manage financial resources allocated to the Demonstration Project.
- 4) Provide contacts and peers within each community to support the selection of IFS.
- 5) Resource commitment from local community stakeholders for appropriate services, resources and equipment.

Communication

- 1) Develop a Family Handbook Guide to assist families and individuals on how to practice IF and access IFS. The Handbook will assist families and individuals to think through the range of choices available to manage resources, the plan and service providers.
- 2) Construct an information pamphlet describing IF/IFS.
- 3) Identify common and successful elements of IF/IFS.
- 4) Communicate IF development with the Advisory Team.
- 5) Communicate IF development with the local community.
- 6) Align efforts and support the Advisory Team to establish a continuum of concept development within their own systems.
- 7) Communicate required information to IF candidates, family and /or support circle.
- 8) Host a Conference on March 30th, 2007 on IF/IFS with the central theme "*The Power and Potential of Change: What Does It Mean for Saskatchewan?*"
- 9) Host a Conference in the late summer/early fall 2007 on best practices in other jurisdictions across Canada.

Appendix C SACL Support and Development

Concept Development and Planning

- Establish research and consultation mechanisms; develop and maintain participant stakeholder planning tables.

Staffing

- Anticipate staff resource needs for project development.

Participant Development

- Establish and provide maintenance to government, community sector, business, professional, family and individual collaborations.

Concept Monitoring and Evaluation

- Develop and adopt program success indicators and program evaluation mechanisms.

Program Development

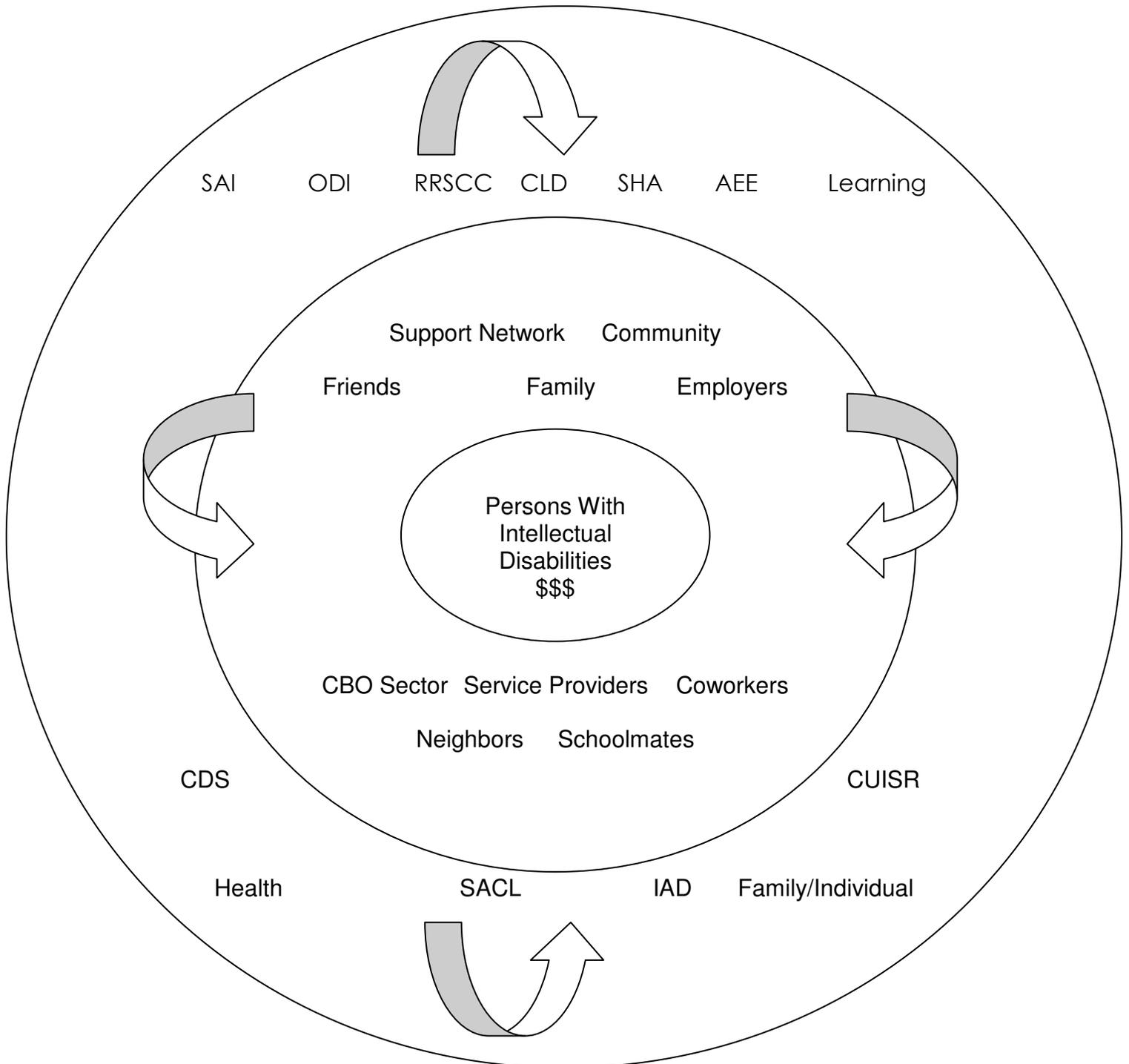
- Support and coordinate local community development and forums; facilitate local sector initiatives and partnerships; provide consultation and community outreach; locate resources, service brokers/coordination, housing, links to employment opportunities et al.
- Locate individuals and candidates for IF through a series of community networks and referral mechanisms.

Appendix D SACL Board & Staff & Local ACL Role Definitions

SACL Site Roles		Local ACL Site Roles	
Management	Board & Staff	Management	Board & Staff
Partnership Development and Relations			
1, 2, 3, 7, 8, 9. From Appendix B	1, 2, 3, 7, 8, 9.	1, 2, 3, 4, 5, 6.	1, 2, 3, 4, 5, 6.
IF/IFS Concept Development			
1, 2, 3, 4, 5, 6, 7, 9, 10, 11, 12. From Appendix B	1, 2, 3, 4, 5, 6, 7, 9, 10, 11, 12.	1, 2, 3, 4, 7, 8, 11.	1, 2, 3, 4, 7, 8, 11.
Accountability			
1, 2, 3, 4, 5, 6. From Appendix B			
Finances			
1, 2, 3. From Appendix B	1, 2.	4, 5.	4, 5.
Communications			
1, 2, 3, 4, 5, 6, 7, 8, 9. From Appendix B	1, 2, 3, 4, 7.	5, 7.	5, 7.
Other			

Appendix E

Participant Circles of Support for Persons with Intellectual Disabilities



Appendix F Community Sites Meetings with Parents Groups Summary of General Themes Related to Problematic Services

The themes represent a summation of general comments regarding problematic services and issues made by parents groups and not the actual recorded statements.

- The current system of block funding provided annually by the Provincial Government to Community Based Organizations for contracted spaces and services can restrict access and self-determination.
- The current block funded system provides few opportunities to develop relationships outside the service provider system and within the community network.
- Within this block funded service model, people are not always treated with the dignity and the respect deserved and expected.
- Given that the Province pays for services, sometimes there is a lack of accountability, responsiveness, creativity and innovation by the service provider.
- There is a sense of reduced citizenship status.
- The block-funded model often develops paternal relationships with a mindset of 'we shall decide for them'.
- There is a general lack of trust for many families and individuals with Provincial Government departments and the agencies they contract with for services.
- The systems are too complex for most people to understand in order to learn about what services are available and how they are accessed.
- The processes of accessing services are problematic.
- The value of self-determination should be the primary guide in order to allow an individual or their support network to decide what services and supports they require and need.
- There are few options for people living in rural Saskatchewan. IF could generate a number of options and employment opportunities.
- There may be issues of finding resource people in rural Saskatchewan.
- The current block-funding model seems to serve the needs of the Administrators as opposed to the needs of people with intellectual disabilities.
- Provincial government policy creates restrictions and boundaries for the use of funds provided to community agencies.
- The focus for CLD seems to be emphasis on the financial as opposed to the service accountability back to the client.
- Services need to be in the best interests of the family and individual and not the service provider.
- The community agencies are increasingly challenged to find skilled and competent staff for the funds made available.
- There are no incentives or recognition for families who continue to care for their sons and daughters through provisions such as tax credits.
- There is little evidence to demonstrate that the leadership in the Provincial Government have taken a fair share of personal and public responsibility necessary to assure the creation and development of individualized services.
- Many families are frightened to challenge the existing status quo and see little evidence with the provincial government and fellow community members of a willingness to meet the expectation of individualized finding.

- Current policy seems to increase competition among a growing number of people for scarce and inadequate resources.
- People remain living at home with their aging parents long past a reasonable time to move out and establish their independence and own household.
- Parents are tired of fighting again and again with the Provincial Government to access and maintain adequate funding for their son's and daughter's.
- Many families passively accept what is offered due to the stresses and strains in their life and the discouragement they receive from the Province.
- There are few allies among area service managers, civil servants and politicians even though the concept of choice, individual budgets, quality of life, person centered approach, meaningful life outcomes and individually funded services has been embraced in many jurisdictions across the world.
- Growing concern that families are facing an inhospitable environment within the public service sector.
- There seems to be an underinvested in services for persons with disabilities.
- The Provincial Government values seniors more than the intellectually disabled as evident in the new income test free drug plan. Two sets of policy standards.
- Funds for persons with disabilities are through social welfare as opposed to a distinct and separate funding mechanism.
- The Provincial Government continues to invest in community-based services that tend to segregate and control persons with intellectual disabilities and prevent them from full inclusion in community life.
- The arbitrary rules around the flexibility and portability of funds, traps many families into accepting the next best solutions and arrangements.
- The Provincial Government communicates that there is a scarcity of funds and hence drives the notion of under investment in services for the intellectually disabled which justifies their cost controls and rejection of new proposals.
- Policy drives the scarcity of resources notion rather than the real resources which may be available.
- The Provincial Government often accuses families of asking for the 'pie in the sky' however few families imagine there are unlimited resources.
- The Provincial Government imposes the idea of scarcity so people won't expect much or feel they should be grateful for what is in place.
- People with intellectual disabilities are socially devalued and not a political force and are not able to strongly protect and advocate for themselves.
- The power for change has always been with the groups of people with intellectual disabilities, their families, friends and support network. Not with the policy makers.
- Community members, employers, neighbors etc. can remain separated from the lives and contributions of people with intellectual disabilities because they assume the Provincial Government and community agencies 'take care of those people'.
- Deep philosophical change needs to occur in Saskatchewan. Without this change, relationships, values and beliefs, assumptions, and the dominant culture that continues to exist and is magnified by the policy makers will prevail.
- The work must continue one family at a time to change the Saskatchewan culture of fear and imposed barriers.
- Systems seem to matter more than people.

Appendix G Approaches that are needed in Saskatchewan

The approaches represent a summation of the general comments made by parents groups and are not the actual recorded statements.

- Person Directed Planning (PDP)
- Support the principle of self-determination.
- Organize services and supports around the need of the individual.
- Accommodate personal preferences and aspirations.
- Shift decision making away from systems and agencies to the individual and family and friends if requested.
- Support directed to the individual and their personal network to determine the best fit of community options.
- Flexible and focus on the individual's strengths, needs and capacity.
- Make services accountable to the individual rather than to those in the system.
- Political action to develop policy of individualized funding which would be controlled by the individual, family and support network.
- Shift in the Saskatchewan culture through a long-term process of public education, community engagement and social advocacy.
- Shift away from the stagnation and control of the Provincial Civil Service.

Appendix H Advantages of IF and IFS for Saskatchewan People

General comments that been presented at parents meetings:

- Facilitates self-determination.
- Reduces system control and ownership.
- Promotes community inclusion.
- Promotes community economic development and job creation.
- Ensures that individuals will have contractual status for a lifetime.
- Creates incentives to maintain the focus on the individual to meet their needs.
- An effective way to ensure overall accountability.
- Produces flexible and responsive services.
- Reduces ineffective service delivery.
- Creates Community Economic Development opportunities in particular in rural areas of the Province.
- Challenges a community to be creative and innovative.
- Research indicates much better outcomes for intellectually disabled people with IF.
- People with intellectual disabilities given the right supports create life events very meaningful to themselves, families, friends and significant others in their lives.
- People with IF will come to know themselves, and known by others, as having unique gifts and able to make real contributions to the well being of others and society.
- People with IF will be able to communicate the direction their life should take, make good choices and become resilient from their experiences.
- Enables a person with an intellectual disability to negotiate and pay a fair price for their services.
- Creates a stronger community by increasing the number of community members who are directly engaged with persons with an intellectual disability.
- Supports the values associated with being a citizen in Saskatchewan.



Individualized Funding & Individually Funded Services Information Sheet

How are services and supports for adults with intellectual disabilities provided in Saskatchewan right now?

Presently, services and supports for adults with intellectual disabilities are primarily delivered in group or congregated settings such as group homes and workshops. Financial support is given to agencies by the Provincial Government to provide a set number of spaces for services and supports for people with intellectual disabilities. This way of providing supports is called the Block Funding model (BF).

While Individualized Funding (IF) and Individually Funded Services (IFS) are not commonly available in Saskatchewan for persons with intellectual disabilities we do know that there are a very small number of IF and IFS projects that are operating successfully in the province. We believe that these projects set a precedent for a move to make IF and IFS true options for everyone.

What are Individualized Funding and Individually Funded Services?

Individualized Funding (IF) is a way some governments provide financial support to people with intellectual disabilities. Under Individualized Funding, a person centered plan is developed for the individual. This plan reflects the individual's needs and goals. The person with a disability can, if they wish, receive money directly from the government to purchase the supports and services they choose, instead of using the services that are currently provided for them. Funding can be sent directly to the person, or a parent/support person or team acting on the person's behalf and that money can be used to buy the services and supports the individual needs. Individualized Funding has been used successfully in many other parts of Canada for over 25 years.

Individually Funded Services (IFS) are services that are planned around the individuals needs and are delivered by agencies that provide services to people with disabilities. Through IFS the individual's personal plan will still be at the center of all planning but the administration and provision of the services is done by a service provider. If the person with a disability or their family decides that their needs can be better met through another service provider they can choose, with appropriate planning and notice, to have their funding moved to another agency. The funding is portable, in other words it 'follows' the person when they move to another service provider or community.

At this time, there are a very limited number of IF and IFS plans in Saskatchewan. We believe that all people with intellectual disabilities should have the right to choose IF or IFS if they want them.

What are the benefits of Individualized Funding and Individually Funded Services?

People who have been able to access IF say that controlling their own funding helps them to get the kind of supports and services they want. They report that their life is better overall through having choices and control. They can explore supported employment opportunities, daytime activities and housing options that were not available before. Some people have been able to own their own homes, hire staff, and get out in the community more often. They tell us that Individualized Funding has changed their lives.

People who have access to IFS negotiate directly with their service provider as they need to. They can change which service provider they use if they find their needs are not being met. Their funding follows them.

Things to think about:

- Some people who have used IF say that they don't enjoy doing the paperwork and that it is sometimes difficult to hire people or find the right kind of services. SACL is prepared to administer the funding on behalf of the individual or their team and/or find another organization to do this.
- Who might be interested in IF/IFS? People who want services that are different than what is currently provided or people who want specialized services or more personalized planning around supports and services.

Why should we support Individualized Funding/Individually Funded Services?

IF and IFS may not be the right choice for everyone; however, people who have used it say that even when there are problems, IF is still better because it allows for flexible, personalized supports. IF and IFS need to be available as a choice for all individuals with intellectual disabilities.

What do we need to have in place to make sure Individualized Funding works well in Saskatchewan?

We need to make IF and IFS available as a real choice for people with intellectual disabilities and their families.

There is a need for clear guidelines that reflect the right of choice and independence. It is critical that the people who will use IF be involved in the development of the Saskatchewan model, and that the resulting model is flexible, based on the needs of the individual, and transportable.

What can I do if I am interested in working on an IF or IFS plan for me or my adult son or daughter?

You can call the Saskatchewan Association for Community Living (SACL). We will answer your questions about IF and IFS. If you are interested in developing a plan SACL will support you to do so. SACL will also help you in determining who you should present your plan to for funding and will support you in doing so.

There is a Guide available that gives you information on developing an Individualized Funding or Individually Funded Services proposal. This is available from SACL.

For more information

Please contact:

Judy Hannah, Coordinator SACL IF/IFS Project
3031 Louise Street
Saskatoon, SK S7J 3LA
Phone: (306) 955-3344 ext. 12
Email: judy.hannah@sacl.org