



Policy Number: SE4.190	Policy Section: Supports and Services	Effective: March 26, 2008 Revised: November 1, 2009
Title: Individual Support Planning		Executive Sponsor: Directors, Regional Operations

1. PURPOSE

CLBC offers a range of funding, support and service options that promote choice, flexibility and community inclusion. Individual Support Plans are used by individuals and their families to identify needs, strengths and goals, and link them to funded and unfunded supports and services. Plans are also used by CLBC staff to make decisions about the funding and services that will be provided.

This policy outlines the content required in Individual Support Plans and explains when plans are required for requested CLBC funded supports. The policy applies to:

- individuals and their families who complete plans on their own, or with the support of others
- facilitators supporting individuals and their families with developing plans
- analysts who review plans

2. DEFINITIONS

Individual Support Plan: a document that includes information about an individual's goals and support requirements, and the funding and services identified to meet them.

Individual: a person 19 years of age or older who is eligible for CLBC services, as described in the CLBC eligibility policy.

Individualized Funding (IF): A self-directed service option as described in the Individualized Funding Policy.

Support Network: friends, family and/or community members who provide personal support, advocacy and/or help with monitoring services and who have reciprocal relationships with individuals.

Youth: a person who is over 16 years of age, but under the age of 19 who is eligible for CLBC services, as described in the CLBC eligibility policy.

3. POLICY

Individual Support Plans can be developed by an individual on their own, or an individual and their family, or a support network, friend or trusted advisor or with the support of a CLBC facilitator.

A CLBC facilitator can help with the development of an Individual Support Plan when CLBC funded supports are requested, or to change existing funded supports to reflect changing goals or circumstances. Facilitators can also provide assistance with planning access to generic and informal community supports when CLBC funded supports are not requested.

When Plans are needed for CLBC funded services they must:

- include a description of the individual and their strengths, goals and support needs
- reflect and rationalize cost effective support options without compromising the plan integrity or service quality
- be consistent with the vision, mission and values of CLBC
- consider the use of generic services and informal community supports, as well as CLBC-funded services
- provide a clear linkage between disability related needs and goals, and the supports and services requested to achieve the goals
- outline how goal achievement will be evaluated

Plans are needed to request CLBC-funded services when:

- the combined services to be provided are in excess of \$6,000 per year
- emergency funds in excess of \$6,000 have been expended in response to an acute, critical situation, and it is anticipated that the service provided will be ongoing. When this occurs, plans are to be completed within six months of when the support was put in place
- waitlisted support requests, or requests on the planning registry, in excess of \$6,000 per year that will likely receive funding within six months (plans developed for youth transitioning to CLBC may be developed prior to a youth's 19th birthday to facilitate timely access to CLBC adult supports)
- a different residential setting is requested
- a different vocational, or community inclusion activity, is requested
- an immediate family member is identified as a potential service provider
- individualized funding in excess of \$6,000 is requested

Plans are not needed to support requests for CLBC-funded services when:

- an acute, critical situation emerges that requires immediate, emergency funding
- support requests are being identified for waitlisting purposes
- small amounts of service such as respite or relief, with a combined cost of less than \$6,000 a year, are requested
- services requested are in excess of \$6,000 a year, but are time limited and goal focused , for example supported employment or life-skills training

When requests for funded services are received:

- Analysts will advise the individual and their family if more information is needed to support the request.
- Facilitators will provide assistance and information for completing plans and requests for service.
- Analysts will advise the individual and their family about the amount and type of funding that can be provided in response to the request.

Funds will be allocated in a manner that supports the reasonable, consistent distribution of available resources while increasing an individual's opportunity to be involved in their community. Supports and services that are the responsibility of other ministries or agencies such as medical services, education or income support will not be funded by CLBC.

4. PROCEDURES

4.1 Facilitators provide information to individuals and their families about the purpose of planning and explain when Individual Support Plans are needed. They can also provide assistance to develop plans. A copy of "Developing an Individual Support Plan for an Adult" should be provided as resource material.

4.2 Facilitators will be available to provide support during the planning process when individuals/youth and their families choose to develop a plan independently. Individuals/youth and their families completing plans independently are encouraged to seek involvement and consultation of others.

4.3 Although Individual Support Plans may be completed in a range of formats, all plans must address the key elements listed below, along with a clearly defined request that is based on this information:

- a. **Summary:** key points of the entire plan including a high level summary of what funding/services are being requested and why, and how the individual or youth was involved in the plan development
- b. **Personal Profile:** a description of the individual or youth that outlines personal characteristics. Relevant information includes how the individual or youth:
 - i. communicates with others
 - ii. requires assistance with personal care
 - iii. builds or maintains relationships
 - iv. stays safe from harm
 - v. participates in work or educational activities
 - vi. takes part in community activities
 - vii. if applicable, has complex health or mental health needs
 - viii. has complex needs or other risk factors that need consideration
 - ix. makes important life decisions
 - x. makes day to day decisions
- c. **Type and Cost of Supports:** a description of the requested CLBC funded supports that are tailored to different aspects of the individual's life and goals, how disability support needs have

been met in the past, the role of informal community supports and generic services, other sources of funding, and support contributions from the personal support network

- d. **Method of Payment:** a statement on whether the funding method should be individualized funding (Direct Funding or Host Agency), through a service contracted by CLBC or a combination
- e. **Safeguards:** a description of the intentional approaches taken to support the individual safely
- f. **Evaluation:** a description of how success will be measured
- g. **Additional Information:** any additional information needed to support the plan
- h. **Contact Information:** information on how to contact the person who is the primary point of communication about the plan

4.4 When developing plans, facilitators will provide information and guidance to individuals/youth and their families about person-centred services and practice approaches that support CLBC's vision, mission and values.

4.5 Analysts will be available to facilitators and individuals/youth and their families for a consultation session to provide informal feedback to assist with plan development, for example, providing information on potential service providers, budget and waitlist information that could guide plan development. The analyst can also use this session to gather information on recruitment strategies to attract the type of service providers envisioned.

4.6 Completed plans will be forwarded to the quality service office. Analysts will review the completed plans to ensure that the required components of the plan are included, in particular that the disability-related need and the supports and services requested match the individual's goals. Resources will be allocated according to funds available, standard ranges of costs for the geographic region and services typically provided in relation to an individual's disability-related need.

4.7 If the plan does not include all of the required information to support a funding decision, the analyst will contact the facilitator and/or family to explain which specific elements of the plan need clarification. If the individual/youth or family has completed the plan independently, the analyst can suggest that the individual/youth or family seek support from a facilitator or others for the plan development process.

4.8 The analyst will contact the facilitator and the individual/youth and their family, within 30 days of receiving a fully completed plan, to inform them about where the review is in process. Once the review is complete, an analyst will provide a personalized explanation about the outcome of the plan review indicating: service requests that will be funded, service requests that will not be funded and services that will be waitlisted. The analyst may also provide information about other supports or services that may be available or appropriate. In the interest of timeliness, if the analyst is unable to reach the individual/youth or family by phone, a letter can be sent to request that they contact the analyst to arrange for a call or meeting to discuss the plan review and funding decision. A facilitator should be invited to participate in the information session whenever possible, and with the consent of the individual/youth and their family.

4.9 When funds are made available to provide all or some of the service requested in a plan, the individual, family, support network, facilitator and analyst involved will work together to implement the service.

5. PRACTICE

5.1 Each plan should be unique and reflect the dreams, needs and wants, strengths and assets, and goals of each individual when requesting services and supports from CLBC. Plans should include information that helps the analyst make a decision about what is being requested.

5.2 The content and amount of information that goes into a plan should be consistent with the complexity of what the individual is requesting.

5.3 When collaborating with individuals and families to create a plan it is important for facilitators to:

- a. acknowledge the expertise, strengths and abilities of the individual and their family in guiding plan development
- b. ensure that the plan focuses on the individual's wishes and goal for themselves
- c. provide information for individuals and families to help them to understand the process involved in completing a plan and provide an outline of the elements that need to be included
- d. encourage support network involvement to brainstorm individualized options

5.4 Analysts and facilitators need to work together to provide the personalised supports that are reflected in the plan. Analysts must strive to implement approved funding as requested and tailor supports accordingly. Facilitators support plan implementation by assisting with accessing generic services and informal supports, by supporting individuals and families to gain information about options in their community, and when needed, accessing, planning, and problem solving with CLBC funded service providers.

5.5 In addition to the above practice considerations, facilitators and analysts need to:

- a. acknowledge and respect First Nations cultural traditions and community relationships
- b. work in ways that support the inclusion of individuals in their community
- c. respect privacy and confidentiality considerations
- d. respect diversity and respond in ways that address potential barriers to accessing equitable service. This might include:
 - i. use of a translator or staff member with a similar cultural background
 - ii. collaborating with people with appropriate cultural or religious affiliations
- e. honour how individuals and families define what is important for them to lead a good life in the community

6. REFERENCES

CLBC Vision, Mission and Values
Facilitator's Practice Guide
Analyst Practise Guide
Discovery Goal-Based Planning Guidebook
Developing an Individual Support Plan for an Adult
CLBC Service Provision by Family Members Policy