



**Building a Full Life Including a Home of One's
Own in Community through Direct Funding**

**An Overview of CL Ontario's March 2016
Discussion Paper**

**Offering Services and Supports to People through
Individualized or Direct Funding**

OASIS March 2016 Discussion Paper



Starting with a Commitment to Social Inclusion

- **No research has been done to determine if the transformation of developmental services over the past 11 years, including the introduction of the Social Inclusion Act, has resulted in a higher degree of social inclusion.**
- **Great deal of change in the regulation and operation of services, but have yet to see a significant improvement in social inclusion.**

CLO argues that the current model does not lead to social inclusion

OASIS believes collaboration between individuals, families, government, agencies and employees is necessary

- **Where individuals are encouraged and supported to make choices that lead to a full citizenship and meaningful participation in all aspects of community life. A balance between everyone is necessary to advance social inclusion.**

OASIS advocates for social inclusion within the existing system



The Status of Direct Funding in Ontario

- According to MCSS, overall funding for the Passport program will be \$255 million and for SSAH \$55 million once the current new funding cycle is completed in 17/18.
- Overall spending in developmental services by that point will be about \$2 billion which means that the \$310 million of direct funding will represent about 15.5% of the funding pot. The vast majority of money will continue to be allocated to supports and services delivered through transfer payment agencies.

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- OASIS has been working (along with others) on recommendations for a funding model and the funding mechanism for individualized funding since 2007. The only approach has been through the use of Passport funding.
- This has done little to meet the overwhelming need, reduction of waitlists and the development of a sustainable funding mechanism that provides choice and stability in the sector.



Policy Considerations – ensuring true transformation

- **A critical policy clarification that must be drawn is the difference between housing (the bricks and mortar buildings in which people live) and the support that people might need as a result of a disability to live in those buildings.**
- **Many of the MCSS funded residential options currently combine housing and support. Negative implications include leaving all costs within the MCSS funding envelope and reducing the flexibility a person has to plan his or her housing needs.**
- **Separating housing from support, the limited resources available to MCSS could be used more effectively by focusing on the support people need. Also, other non-government rental and purchase mechanisms could be brought to bear more effectively if housing was separated from support.**

Points to ponder

- **Housing costs are normally not paid for with MCSS money, but are paid thru ODSP and/or other revenue by the people living in the home**
- **Agency's owning property allows the ability to customize living space for the support required.**
- **Owning property allows for low, stable rents, suitable housing and the exemption of property tax.**



Clarifying the current policy regarding direct funding for supported living

- **Myth or true...The program is intended to be primarily for the purchase of supports to participate in day activities, respite and a limited range of daily living supports.**
- **Passport funding can be used for “activities of daily living” which the legislation defines as:**
 - **Services and supports to assist a person with a development disability with personal hygiene, dressing grooming, meal preparation, administration of medication, and includes training related to money management, banking, using public transportation and other life skills and such other services and supports as may be prescribed.**
- **CLO has stated that under the current policy most, if not all of the daily living supports a person may need to live in their home, alone or with another person, could be funded through Passport.**

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- **OASIS states that where flexibility in managing existing resources and new allocations exist, innovations and creative service delivery occurs.**



Vacancy management and transferability of funding

- **Mythe or True: Vacancy management works to maximize efficiency by fully utilizing the services that currently exist resulting in agencies have little flexibility with respect to changing the type of supports and services they provide.**
- **Transforming systems to think differently about “available resources”. What is the most effective way to use the freed up resource?**

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- **Funding needs to be tied to the individual and not to the service provider for direct service costs regardless of whether the individual and their support network have chosen direct funding or agency based services.**



Funding levels (funding availability)

- **Passport funding cap**
- **Policy objective to increase availability of direct funding and rebalance the system with an aim of raising the current funding allocation to direct funding without reducing the capacity of service delivery by agencies.**
- **Rationale for the wide discrepancy in funding allotments between the direct funding and services provided through transfer payment agencies. How this aligns with the key principles of transformation “fairness and equity”.**

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- **Individuals and their families should have the assurance that the funds they receive go to Direct Service Costs and that infrastructure costs that an agency must incur are funded independent of the direct support provided to the individual. An annual review of the established funding levels needs to occur and be monitored. Adjustments based on COLA or other statistical information should be used to assist in determining if funding levels are up to date.**



Transparency of funding allocations

- **No establishment of a funding entity or mechanism to determine funding allocations**
- **Presumptions and questions surrounding allocations**
 - **Assessed needs paired to costs of supports .. Equitable process??**

CLO contends that we must be able to measure to what degree the funding a person receives is adequate to address the support needs for which it is intended. It is a policy aim to ensure that funds are shared equitably.

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- **Has recommended a funding allocation formula that considers:**
 - **Definitions for Direct Service Costs**
 - **Administration Fees**
 - **Adjustments for intensity of service needs and regional and other variances**
 - **Program Administration Costs**
 - **Infrastructure and Overhead Costs**
 - **Risk and Contingency funding**



Avoiding unintended consequences

- **Direct funding can be misused and produce harmful effects**
- **Pooling of funds encourages segregation and congregation**
CLO's view is that this works against social inclusion, however one could argue that this restricts a families choice to gain efficiencies through pooling. (i.e. 3 roomates)
- **No provision has been made to regulate programs that emerge through direct funding dollars – For-Profit industry**
- **Need for Policy framework i.e. accountability, monitoring and safeguards to ensure that direct funding is used to achieve the aims for which it is intended.**

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- **A collaborative approach between individuals, their family/support network and support agencies will result in accountable spending of public funds in accordance with a plan that includes quality and life enhancing outcomes that are measured and adapted as needed.**



Individualized planning and supports

- **Person centered planning is a means to continually explore one's vision and possibilities for a valued, inclusive community life and to organize thoughts, ideas, people, actions and resources to enable that vision.**
- **Funding for planning should be provided above and beyond the actual cost of support that a person requires.**
- **Funding should be allocated and made available for planning prior to undertaking the assessment process.**

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- **Individuals and families must be given the opportunity and freedom to plan and direct their own lives, identifying the type of support they would like, the location the support will be offered in and who will provide the support, leading toward full citizenship and meaningful participation in all aspects of community life.**



Supports for individuals and families to undertake direct funding

- **Families will need help and support throughout the whole process to assist at helping them imagine what a good life in their community could look like and how it could be achieved.**
- **Strategies are needed and separate resources are required for:**
 - **Assistance to families in planning**
 - **Communication and information on Direct Funding**
 - **Family support resource centres and tool kits**
 - **Streamlined administrative burden**
 - **Aligning the transfer payment system with the direct funding system**

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- **Collaborative approach reduces burden**
- **Program administration, infrastructure and overhead, risk and contingency funds must be funded separately for agencies.**
- **Direct Funding should not be the catalyst by which the supports and services are determined. Rather it should be a funding method to flow the funds needed to pay for the support needed to attain and retain supports and services.**



Ensuring people live in safe and healthy environments

- **Whether funding is provided to support a person to live outside or inside their family home, safeguards need to be in place and properly monitored**

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- **Strong, sustainable agencies provide the backbone for transformation of the developmental services sector, and are the providers of the majority of supports and services that minimize risk and ensure full community engagement of Ontario's most vulnerable citizens.**



Cash Flow and Funding adjustments

- **Direct funding should be provided in advance and simple mechanisms for reporting on the use of funds should be developed.**
- **Payment on a recovery basis causes a burden and prove to be a barrier to families**
- **Need for a policy that would adjust funding to address increased costs**

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- **Where individuals have support dollars allocated to them to meet their changing needs and have the right to choose between managing their own funds or having an agency assist them with their support needs that are adjusted over time to reflect current cost of living adjustments.**
- **Funding must flow on a monthly basis in advance**



Equity – wages for support workers

- **Wages in the direct funding model have been quite low.**
- **No recognition to adjust funding for inflation and changing needs which has actually forced a downward trend in wages paid.**
- **Inequity to the increased wages paid to workers thru agencies.**
- **Policy framework needed for wages and benefits paid to workers thru direct funding. CLO recommends that the Ministry undertake a review of direct funding wages and develop a policy and funding approach that will resolve the situation.**

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Appeals and Passport categories

- **Changes are needed to legislation to allow for “appeals” by a third party of the decision made about the support a person receives including the funding allocation**
- **Passport category for residential supports as a person seeks to change their living arrangements during the course of his/her life changes in funding should be seamless and based on the identified needs of the individual**

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- **Funds need to be portable and if circumstances require a change in support provision or location the dollars may be moved to continue supports**
- **There must be a mechanism to monitor and adjust the funding levels as needed.**



Accountability

- **While Direct Funding may be accountable due to the recovery of expenditure model, much work needs to be done to ensure that quality of supports provided and outcomes achieved.**
- **If the recommendations within the discussion paper are acted on then the result will be a high degree of accountability both quantitatively and qualitatively.**
 - Funding allocation would be fair and equal
 - People receive support tailored to their unique needs even the most complex needs met effectively/efficiently
 - Funding is not pooled in ways that will act against social inclusion
 - People having access to higher levels of funding for in-home supports that will allow them to be creative
 - Mechanisms in place to ensure the health and safety of people
 - Reform approaches to service delivery
 - Vacancy management system is reformed
 - Using the direct funding model will increase without affecting the viability and stability of the TP system
 - Stability and fair compensation for support workers

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- **Collaboration Matters: Where the individual, their family/support network and support agencies are accountable for spending public funds in accordance with a plan that includes quality and life enhancing outcomes that are measured and adapted as needed.**



Conclusion

- **CLO's aim is to promote discussion and to explore the changes that are needed to stay on track to achieve the outcomes that have been identified.**
- **Work needs to be done to ensure that direct funding can be used in as flexible manner as possible in order to achieve the best outcomes for people...**

Points to Ponder

- **Is CLO advocating for the eventual elimination of agencies and as a result actually restricting choice?**
- **Does Direct Funding actually lead to social inclusion?**
- **Is Direct Funding morphing into the mechanism that dictates supports and services rather than being no more than a method of cash flow?**
- **OASIS advocates for social inclusion within our existing system but are agencies embracing change to a more collaborative approach and transforming their supports and services to a more social inclusive structure?**

Where is the balance?