

## Completing paper work

### Reporting Requirements to CLBC:

- Direct Funding Simplified - complete an online Compliance Report every 6 months or less (with the option to submit by mail);
- Direct Funding Standard - complete an online Financial Report every month; and
- Host Agency - provide a Financial Report every 3 months (with a copy to the Agent). We can help you with the details and provide flow charts to clarify the steps in the Direct Funding or Host Agency process.

Check out the Instructional Videos on Vela's website, or on the CLBC website under "Individualized Funding." These step by step videos show HOW to complete both a Simplified and Standard report online

## Ways to connect and learn

Whichever option you decide to take, Direct Funding or a Host Agency, we are here to help you through this process.

Vela offers many ways for you to connect with others and learn, such as:

- a website with general information and resources to support Microboards and IF Agents;
- a facebook and twitter page;
- a print newsletter that is published 1 to 2 times a year;
- regional meetings;
- regional training events; and
- linking those who want to connect with someone facing similar issues.



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**Website:** [www.velacanada.org](http://www.velacanada.org)

**Facebook:** [www.facebook.com/velacanada](http://www.facebook.com/velacanada)

**Twitter:** [www.twitter.com/VelaCanada](http://www.twitter.com/VelaCanada)

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Langley, B.C. Canada V3A 8M8

**There is no charge for our services in the province of B.C.**

Please see our other brochures:

More About Microboards

Microboards and Individualized Funding

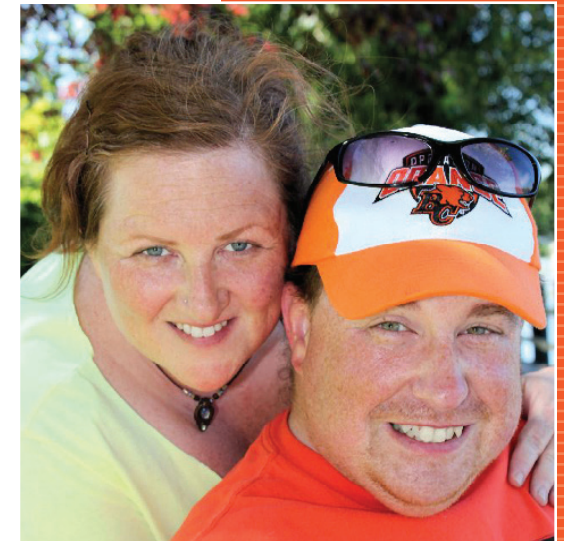
We gratefully acknowledge the funding support provided by:



and our generous donors



**MORE ABOUT  
INDIVIDUALIZED  
FUNDING**



**Vela is a non-profit society that provides information and mentoring to individuals with disabilities and their trusted others to take greater control of his/her life by exploring ideas and options that can lead to customized, inclusive and creative support and services. This can be done by:**

- accessing Individualized Funding (IF) through one of Community Living BC's (CLBC) payment options. IF allows the individual to choose someone to receive funds directly to purchase his/her own services.

**Vela provides information to help you determine if IF is a fit for you**

We will:

- describe the different forms of IF:
  1. Direct Funding Simplified;
  2. Direct Funding Standard;
  3. Host Agency;
- help you explore how IF can help the individual;
- describe the process to access IF; and
- walk you through the process to access the funding.

The supports and services delivered through Individualized Funding must be:

- a new service or an alternative to existing contracted services that is intended to be more personalized.

Individualized Funding cannot be used to:

- purchase space in an existing service/program;
- expand an existing service/program; or
- sub-contract to an agency or organization to hire support workers or caregivers.

If you do not wish to proceed with Individualized Funding, but don't know where to turn next, Vela can assist you in making additional connections

with Community Living BC, other ministries, community professionals, and other agencies.

**Person-centred planning**

Vela can help you focus on the individual's vision for the future. We are trained to facilitate person-centred planning, which focuses on, from the perspective of the individual, his/her:

- hopes, dreams and goals;
- needs and challenges; and
- likes and dislikes;

**Proposing services for funding**

If you have chosen to access funds, you may need to complete and submit information to your funding agency to support your request for services.

Depending on the agency you work with (e.g. Community Living BC, Ministry of Health, Ministry of Children and Family Development) there may be different information requirements. Information asked for can include:

- the specific needs of the individual;
- the type and cost of supports and services; and
- planned safeguards for the individual.

Connect with the funding agency you choose to get support to complete their information requirements. They will use this information to help determine the amount of funding you will receive. Your Vela facilitator is also available for support through this process.

**Decide how the funds will be managed**

The individual chooses a person, who is called an Agent, to act on his/her behalf. The Agent may choose to receive and manage the funds directly – this is called Direct Funding. The Agent must show CLBC they can manage the funds.

If the Agent is going to receive Direct Funding it is helpful if he/she has the following skills:

- is creative;
- has a vision (understanding/idea/dream) of the

supports that are needed;

- is connected in the individual's community;
- is a good money manager;
- has the extra time needed;
- is a problem solver; and
- has a good credit rating (the Agent must have a credit check, if funds are over \$25,000/yr).

The Agent receives the funds directly and is responsible for the management of the funds. There are many things to consider and learn about, such as:

- the difference between employees and contractors;
- employment documents and contracts ;
- payroll and bookkeeping;
- CLBC Standards and reporting process; and
- regulations such as Employment Standards; WorkSafeBC; and the Canada Revenue Agency.

However, if the Agent doesn't have all of these skills, Vela can assist him/her to develop those skills.

If the Agent does NOT wish to manage the funds AND the funds are for a Direct Funded Standard agreement, he/she can choose a CLBC approved Host Agency to manage the funds. A Host Agency is an agency that is approved by CLBC to manage IF funds on behalf of an individual. CLBC has a list of approved Host Agencies.

If the Agent chooses a Host Agency he/she will need to sign a Host Agency and Agent Support Agreement detailing how the Agent and the Host Agency will work together to ensure the individual's needs are met. It should include:

- the responsibilities of the Agent and Host Agency;
- how success in achieving the goals will be measured and reported;
- how information will be communicated between the parties;
- how the services will be monitored; and
- how the agreement can be ended.

In special cases the individual can act as his/her own Agent and choose a Host Agency to manage his/her funding and services.