

Agent and choose a Host Agency to manage his/her funding and services.

■ Completing paper work

Reporting Requirements to CLBC:

- Direct Funding Simplified - mail in a Compliance Report every 6 months;
- 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 the Direct Funding or Host Agency process.

■ Ways to connect and learn

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

We offer many ways for you to connect with others and learn, such as:

- a website with general information about Microboards and IF;
- a facebook page;
- a print newsletter that is published 3 to 4 times a year;
- regional meetings;
- regional training events; and
- linking those who want to connect with someone facing similar issues.

■ How we can be contacted



Call: (604) 539-2488

Fax: (604) 539-2483

Email: info@velacanada.org

Website: www.velacanada.org

Facebook: www.facebook.com/velacanada

#1 – 5761 Glover Road,
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.

July 2015



**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.

■ We provide information to help you determine if IF is a fit for you

We will:

- describe the different forms of IF:
 - Direct Funding Simplified (under \$6,000/yr);
 - Direct Funding Standard (over \$6,000/yr);
 - Host Agency (must be over \$6,000/yr);
- 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 replace a service;
- innovative; and
- 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, we can assist you in making additional connections with Community Living BC, other ministries, community professionals, and other agencies.

■ Person-Centred Planning

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

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

from the perspective of the individual.

■ A proposal for services

If you expect that the supports you need will be over \$6,000/year, you will need to complete an Individualized Service Plan to submit to Community Living BC. The information in the Individualized Service Plan is used by CLBC to decide the amount of funding the individual will receive.

The Individualized Service Plan describes:

- the individual in great detail;
- the type and cost of supports and services; and
- safeguards for the individual.

The Individualized Service Plan must be compiled by a CLBC Facilitator and can include assistance from:

- the individual's family and friends; and
- a Vela Facilitator.

■ 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 that they are capable of managing 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 over \$6,000/yr 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

