



INDIVIDUALIZED FUNDING OPTIONS & FLOWCHART

Direct Funding

Simplified

Under \$10,000/yr
from CLBC

Standard

Over \$10,000/yr
from CLBC

The Agent receives the funds directly from CLBC and pays for the supports and services.

The Agent is responsible for:

- assisting the individual to plan for their future;
- supporting the individual to achieve the goals in their plan;
- understanding the CLBC contract responsibilities;
- arranging for paid and unpaid supports;
- managing and monitoring the supports and services;
- setup and administration of the business responsibilities (e.g. Criminal Record Check, WorkSafe BC, Canada Revenue Agency, employment documents, contracts); and
- accounting and reporting for the funds from CLBC. (You may pay a bookkeeper or payroll company from the funds to do this.)

CLBC must confirm the Agent is capable of holding the contract.

The Agent will become the employer and will hire, train, supervise, and pay their employees. (Respite caregivers providing support in the individual's home are also employees.)

The Agent may also contract for respite in caregiver's home, a home share provider (Standard only), and in exceptional circumstances therapy services.

Host Agency

Must be over \$6,600/yr
From CLBC

The Host Agency receives the funds from CLBC and pays for the supports and services.

The Agent is responsible for:

- assisting the individual to plan for their future;
- supporting the individual to achieve the goals in their plan;
- choosing a CLBC approved Host Agency as the service provider.

The Host Agency receives the funds directly from CLBC and pays for the support and services.

The Host Agency will become the employer and will hire, train, supervise, and pay their employees. (Respite caregivers providing support in the individual's home are also employees.)

The Host Agency may also contract for respite in caregiver's home and/or a home share provider.

The Agent or Host Agency cannot subcontract with an agency or company to hire support workers or caregivers.

Direct Funding Simplified

Under \$10,000/yr
from CLBC

An Individual Support Plan is NOT needed.

The Agent receives the funds and must do the following:

- Sign a **Direct Funding Simplified Agreement** with CLBC
- A separate bank account in the Agent's name is recommended, but not required.
Note: If you use your personal account, an audit would look at all of the money in the account, not just the CLBC funds.

Direct Funding Standard

Over \$10,000/yr
from CLBC

Complete an Individual Support Plan with a CLBC facilitator.

The Agent receives the funds and must do the following:

- Be named the individual's legal decision maker. For information about legal decision makers: www.nidus.ca
- Complete an **Agent's Application to Manage Direct Funding**
- Complete a personal credit check if funding is over \$25,000/yr
- Prove the individual has a Disability Tax Credit Certificate from Revenue Canada
- Sign a **Direct Funding Standard Agreement, Schedule A – Supports & Services, and Schedule B – Payment Summary** with CLBC
- Open an "in trust" bank account in the Agent's name to receive the funds. If an "in trust" account is not available at your bank, ask your CLBC analyst what other account type they will accept.

"In Trust" bank account means an account that is managed by one party for the benefit of another.

Host Agency

Must be over \$6,600/yr
from CLBC

Complete an Individual Support Plan with a CLBC facilitator.

The Agent signs an **Individual Support Agreement and Schedule A – Supports & Services** with CLBC.

The Host Agency receives the funds and must do the following:

- Sign a **Host Agency and Agent Support Agreement** with the Agent, detailing how they will work together to ensure the individual's needs will be met. The Agreement must be submitted to CLBC. 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.

- Sign a **Direct Deposit Application** form so money can be transferred electronically.
- Hire employees and/or contract for respite in a caregiver's home.
- Learn and follow the CLBC Policies and Standards that apply.
- Learn about employment legislation (e.g. Employment Standards, WorkSafe BC, Canada Revenue Agency).
- Review the CLBC liability insurance policy.
- File a **Compliance Report** every 6 months. (Can be done online or via paper form)
- Understand how the agreement for service is renewed and/or terminated.

- Sign a **Direct Deposit Application** form so money can be transferred electronically.
- Hire employees and/or contract for respite in a caregiver's home and/or a home share provider.
- Learn and follow the CLBC Policies and Standards that apply.
- Learn about employment legislation (e.g. Employment Standards, WorkSafe BC, Canada Revenue Agency).
- Review the CLBC liability insurance policy.
- File an online **Financial Report** every month.
- Understand how the agreement for service is renewed and/or terminated.
- Meet yearly with a CLBC staff to review the outcomes and indicators of success

- Sign a **Host Agency Funding Agreement, Schedule A – Supports & Services, and Schedule B – Payment Summary** with CLBC.
- Hire employees and/or contract for respite in a caregiver's home and/or a home share provider.
- Follow the CLBC Policies and Standards that apply.
- Follow the legislation that applies to employers.
- Provide a **Financial Report** to CLBC and the Agent every 3 months.
- Submit copies of the Financial Report to CLBC at the end of each reporting period.
- Meet yearly with CLBC staff to review the outcomes and indicators of success.
- Understand how the agreement for service is renewed and/or terminated.

Individuals, Agents, and Host Agencies will be audited by CLBC on a sample basis.

If you are audited, you will need to submit copies of records, receipts, and invoices.