



OIFN Questions and Answers

Independent Facilitation and the Independent Facilitation Demonstration Project (IFDP)

This Q&A document includes OIFN's responses to questions about the:

- Role of Independent Facilitation
- Outcomes and impacts of the Independent Facilitation Demonstration Project (IFDP) funded by the Ministry of Children, Community, and Social Services (MCCSS) in 2015-2019
- Learning about the importance of ongoing infrastructure funding for Independent Facilitation in Ontario.

1. "What was it (like) before (the project)"? What was the project compared to (the landscape of the availability of Independent Facilitation) before?

- Independent Facilitation has been offered sporadically across the province in those communities where capacity had been developed intermittently through a range of grants, many of which were Ministry funded projects.
- The practice of Independent Facilitation has become a more cohesive and comprehensive practice as a result of the project.
- [See Appendix I: Key points of History - Independent Facilitation in Ontario \(attached\)](#)

2. What were you able to do with new funding? / What were you able to achieve (with the project funding?) (how many people reached, etc.?)

- The two-year Independent Facilitation Demonstration Project (IFDP) funded by the Ministry of Children, Community and Social Services (MCCSS), and extended an additional two-years, **built organizational and facilitator capacity.**
- Over the course of the project, the infrastructure created through the IFDP has trained and built the capacity of 80 independent facilitators. Currently, 57 active facilitators continue to support 1700 people and families across Ontario.
- People who live with a developmental disability have benefited from Independent Facilitation through assistance with developing a strengthened voice with their families and those they trust, and many have:
 - developed individualized housing solutions,
 - obtained paid employment,
 - engaged in meaningful volunteer roles in the community
 - built networks of support, and
 - received assistance with school-to-work transitions.

- See Appendix II: Collective Impact Chart (attached) for further information on the kinds of outcomes and impact measured as a result of the project's efforts, and the **innovative work of OIFN on defining and measuring impact and outcomes of Independent Facilitation**
- Through the Project, OIFN refined the practice of Independent Facilitation as a more cohesive and comprehensive practice to **facilitate change and customize support through planning, action, reflection and learning**, that is person directed, individualized community first support. The Scope of the Work of Independent Facilitation is framed in 5 areas:
 - Relationships
 - Personal Support Network
 - Community Discovery and Connection
 - Information, Knowledge and Resources
 - Planning
- OIFN in its data gathering through the project, confirmed the importance of Independent Facilitation at points of transition for people in times of life transitions, including the transition from school and children's services to adult services and supports.
- OIFN, within the first 2 years of the Project, with the benefit of Community Development resources, was able engage in community gatherings in 5 communities across the province with emerging interest in Independent Facilitation, including the North and Near North.
- Through the Project, OIFN Community of Practice gatherings occurred in the northern part of the province as well as in the southern parts of the province (with about 4 gatherings per year during the course of the project).
- OIFN expanded its reach through Social Media, and sharing resources via its website oifn.ca, [Facebook](#) and [Instagram](#)
- OIFN engaged in innovative work defining and measuring impact and outcomes of Independent Facilitation

3. Where were you hoping to go? / What was hoped for?

- Demonstrating benefits of infrastructure support offered by Independent Facilitation organizations
 - Capacity building investment in Independent Facilitation
 - Mentoring and coaching support available to independent facilitators.
- Demonstrating benefits of OIFN's Community of Practice and gathering people together to learn from one another including people with disabilities, family members, friends and those who love them, independent facilitators and other allies that support citizenship for everyone and growing the practice of Independent Facilitation for its contribution to the self-determination and citizenship.

- Demonstrating collective learning and collaborative shared practice and experiences among Independent Facilitation Organizations (IFOs) engaged in the project, resulting in stronger outcomes and impact with IFOs and in IFO communities.
- **Helping people with disabilities take up their rights as full citizens**
 - Since the early 1990s, leaders among self-advocates and families have worked tirelessly to ensure that people with disabilities are acknowledged as contributing members of society
 - Canada is a signatory to the UN Convention on the Rights of Persons with Disabilities, yet these rights are not afforded to all
- **To facilitate changes necessary for full citizenship, we** envisioned the development of a “citizen focused framework” that would enable people to direct the course of their lives as citizens and engage support that aligns with their unique vision, goals, and needs.
- **These forces are driving the need for a citizen focused framework:**
 - A vision of people as citizens, directing their own life, finding their place in community as a valued member who contributes
 - People do not have support for their whole life as adult citizens, and a significant number of people with developmental disabilities have no support at all
 - The cost of continually expanding current service delivery models of support is unsustainable.
 - For a significant number of people with developmental disabilities, the current service delivery model is not desirable or needed; they have an interest in self-direction and individualized funding, two key components integral to self-determination.
 - For people and families to exercise self-determination and power, it is important that several functions and resources are available and not all controlled by one community organization or agency, including:
 - Direct Individualized Funding
 - Independent Facilitation (help figuring things out)
 - Affordable and accessible housing resources
 - Administrative Resources
 - Staffing resources
 - Inclusive lifelong education and learning opportunities
- **To facilitate full citizenship**
 - **Supports need to** be individualized — directed by the person (with their family and others who love them), with their own vision and their needs

- **People need to** leverage support from sources beyond Developmental Services that are based in the neighbourhood/community where people live, including people, places, funding, housing, organizations that anyone would/could use, and all levels of government
- **Independent Facilitation needs to be available to people and their networks especially those who are currently receiving minimal support dollars or who are not currently supported in any way** because longer term planning helps avoid crisis and builds a stronger foundation for the future with their loved ones.
- **Independent Facilitation requires appropriate infrastructure to ensure that it is available on an equitable basis to all.**

4. Where will this be April 1? And where will this service be then? Where will this service be (if it is cut)?

- Independent Facilitation is not sustainable on a Fee for Service basis only. Fee for Service may be sufficient as an enhancement, or an additional offering of an organization with infrastructure funding for Independent Facilitation. Fee for Service is not a viable option without ongoing infrastructure funding to an organization offering Independent Facilitation.
- The experience from past projects funding Independent Facilitation shows that when grants and project funding dried up, Fee for Service alone did not prove to be a workable, viable option to sustain the practice.
- People and families can choose to purchase a service from an agency with fee for service however if they decide to move on, the agency still maintains its infrastructure funding.
- Developmental Service agencies funded by the Ministry (TPA's) have demonstrated over the years that they need infrastructure support to provide ongoing effective services.
- Fee for Service arrangements are essentially an enhancement to their infrastructure funding.
- Experience over four years of the IFDP shows that Independent Facilitation Organizations supported many people and families in crisis situations. See *Collective Impact* Appendix
- A loss of this support will spiral people back into crisis mode, overwhelming over-extended emergency wards, long term care and other specialized facilities, increasing costs.
- A Fee for Service only model would result in the option of Independent Facilitation ceasing to exist.

- The organizations established to make Independent Facilitation available in the course of the IFDP, cannot survive on fluctuating and inadequate resources provided via individual family contracts. Nor should families be expected to shoulder the cost of the assistance and support resource of Independent Facilitation.
- Dismantling the organizations that are currently supporting independent facilitators will also terminate facilitation training, development and capacity building structures vital to this emerging practice. The experience and expertise of most of the Independent Facilitators across the province will be lost as they will be forced to find alternate full-time work.

5. What is the fear if MCCSS uses only fee for service?

- In a Fee for Service option only, families are placed in an undesirable conundrum: they must choose to utilize whatever funds they have available to contract for daily supports that are needed for survival; or choose to contract for longer term planning and engagement.
- Creates a two-tiered support available only to those who have the financial means to purchase the support, contrary to the vision of equitable services and supports.
- Longer term planning helps avoid crises and builds a stronger foundation for the future with their loved ones. When funds are limited and life is in crisis, decisions are made to alleviate difficulties and suffering in the short term.

6. Movement towards person directed (funding and purchase in the hands of people) in autism and physically disabled — why won't this work for Independent Facilitation?

- Independent Facilitation Organization's support adults including those with autism and physical disabilities.
- Individualized funding, which should include dollars for innovative housing, is key to individuals and families customizing supports and building a meaningful adult life. These supports are designed to offer accompaniment support to people as they take up adult roles in the community.
- For people living with autism, customizing a life in community works well for those who need and want a full life in their neighbourhood/community. Independent Facilitation support offers the person and their family/and or loved ones a way of reimagining what is possible and concrete support to implement the plan through a series of next steps.
- Current restrictions deny many people with developmental disabilities the ability to access this method of support.

7. Are people waiting for Independent Facilitation? Did you have waiting lists? (what do you think the Ministry will say about whether or not people are requesting this? and are there waiting lists?)

- There is clearly anecdotal evidence of pent up and growing demand in many regions of the province for Independent Facilitation.
 - This is true in those areas of the province who offer Independent Facilitation and those areas especially in the North that do not have any infrastructure funding to offer it.
- OIFN has asked MCCSS and several DSO's for data on the number of families that have asked for Independent Facilitation at the DSO offices and are unclear as to whether the data is being collected.
- Some DSO's report routinely on individualized housing funding proposals received, while many parts of the province are not reporting on this data. In areas that report individualized housing solution requests, there are more individualized housing funding proposals submitted in geographic areas in which people and families are benefitting from the assistance of Independent Facilitation.
- Because of the limited funding through various initiatives/grants, people and families in various communities who have previously experienced or have been introduced to Independent Facilitation grants are asking "why can't we get a facilitator?"

8. What was the most multiplying effect of having New money (under the project?)/ (thinking about how many more people were reached?)

- Over the course of the project, the infrastructure created through the IFDP has trained and built the capacity of 80 independent facilitators. Currently, 57 active facilitators continue to support 1700 people and families across Ontario.

9. What do you think your work proves on heal of Ombudsman's Report?

- We have undoubtedly learned over the past 20 years that families engage more vigorously making changes in their lives and customizing support when they're offered ongoing support that is timely and relevant to them. People and their families set the pace and direction of change, and in this way maintain their autonomy and decision-making. This power dynamic is critical in helping people take up value to adult roles in their neighbourhoods and make full use of any individualized funding they might receive. Independent Facilitation support mitigates against family crisis due to the fact that families are supported on a regular basis to ascertain threats and safeguards.
- It should be understood that outside of a time limited project, Independent Facilitation has been shown to be effective for people and families experiencing complex life circumstances. Past experience with complex life circumstances indicates the following:
 - Some families of children living with complex needs learned that through their school experience that unique support arrangements had to be negotiated and arranged for the son/daughter to learn. We know of students who live with Autism

who have graduated with their high school diploma and are going on to post secondary.

- Significant time is needed to build a trusting relationship before any substantive planning can be entered.
- There are many basic needs/social determinants of health that must be addressed before substantive planning can be started; therefore the Independent Facilitation process must be responsive to the needs of the person and their family at any given time.
- More individually tailored approaches are needed to address a sustainable and successful full life in community and these approaches require significant conversations, depth of work and time before they are created.
- See Appendix III: OIFN Working Definition of Complex Life Circumstances (attached)



A LIST OF SOME KEY HISTORICAL EVENTS RELATED TO FEE FOR SERVICE

This list is far from exhaustive, and is meant to give a snapshot of events that lead to facilitation and planning becoming independent of direct service provision.

- 1988 – Wolf Wolfensburger had people thinking about the importance of people with disabilities having valued social roles.
- 1988 - People First of Ontario formed, with advisors and the *People First Advice for Advisors* is written. People themselves telling others what they need!
- Prior to 1998: Marsha Forest challenged families with young children about the importance of inclusion for their lives. Parent leaders formed, such as Susan Beayni, Rose Galati, Michelle Friesen, Alison Ouellette, Marleen Crawford and many others. Their sons and daughters are all adults now and fully included in their neighbourhoods/community.
- The Individualized Funding Coalition for Ontario (IFCO) formed with John Lord, Judith Snow and many others.
- 1998 – **Three pilot projects funded by MCSS** to evaluate what was called then unencumbered planning and individualized support and funding in Windsor/Essex, Toronto and Thunder Bay.
- 1999 – John O’Brien wrote a paper called *Community Engagement – A Necessary Condition for Self-determination and Individualized Funding*
- 1999 - **Individualized Funding: A New Vision, ‘Report from the 1998 Symposium’** “Individualized funding is consistent with the principles of self-determination and autonomy that are at the heart of human rights protections for persons with disabilities.”
- 1999 - **Citizen Advocacy Ottawa requested by the Regional Office of MCSS to implement a Person-Centered Planning Pilot Project.** Funds were provided to recruit and train independent person-centered planning facilitators and pilot the approach with 37 families. The project included an evaluation.
- 2000 - **More Choice and Control for People with Disabilities: Review of Individualized Funding** - “Whether it is a broker, facilitator or network builder, there needs to be a person and an organization that can help individuals and families build their capacity and individualized plans. And this person and organization must be free of conflict of interest from service providers and government. Keeping infrastructure supports separate from the direct service system helps ensure that the supports will be individualized and person centred. Facilitators not attached to the service system can put all their energy into supporting the person and family as opposed to concerning themselves with program and service issues.”
- 2000 - **Linking Individualized Supports and Direct Funding, Making Money Work for People, ‘The Round Table Report’** — “Continuous planning and implementation

support – Local planning for the individual should be unencumbered, and kept separate from service provision. Infrastructures, such as facilitators, are in place to assist individuals and their networks to plan and access their supports. ... The implementation directions and strategies emphasize the importance of eliminating any possibility of “conflict of interest” of facilitators. Our research has strongly pointed to the value of unencumbered planning. In other words, facilitators should not be tied in any way to the service system, but *be free to plan and advocate with individuals and families.*”

- 2000 - **Support to Aging Families Trillium project** in Dufferin, Guelph and Durham regions offering Facilitation support to individuals and their families. Supported by four local TPA's and one Family Group.
- 2001 – A statement from 10 Ontario Disability Organizations – Time for change: allocation of MCSS Funding for 2002 for people with developmental disability — this paper urged the minister to ensure that at least 25% of all new funding be allocated toward individualized funding arrangements.
- 2004 – IFCO holds a Workfest - People and families said that they had little choice and control over the services and supports they accessed. The service tended to segregate people with disabilities.
- 2005 – **Common Vision for Real Transformation** was created by the 4 provincial grassroots organizations: Family Alliance of Ontario, IFCO, People First of Ontario and SSAH (Special Services at Home). These documents stress the elements important for change — independent planning and facilitation, funds for disability supports (individualized funding), housing separate from support programs, and they talk about the impact of Independent Planning and Independent Facilitation.
- 2006 – Ministry published a plan called *Opportunity and Action – Transforming Support Services for People who have a Developmental Disability* – committed to individualized funding.
- 2006 - Moving Toward Citizenship: A Study of Individualized Funding in Ontario - “All families were very positive about the importance and helpfulness of their facilitators. The strength of this theme gives credence to research that suggests that independent planning and facilitation are an essential infrastructure with individualized funding.”
- 2006 – Citizen Advocacy Ottawa requested by the Regional Office of MCSS to create a person-directed project to assist “individuals and families most in need” including those in hospital. Over 6 years, **Real Plans for Real Life** was funded to work intensely with close to 100 individuals and families using an independent person-directed planning and facilitation approach.
- 2006 – MCSS paid to have members of IFCO write a *Guide on Person-Directed Planning*.
- 2008 – 2011 – **A provincial project called Modelling Community Change and Innovation (MCCI) funded through Trillium. Kevin Costante, MCSS Deputy Minister wrote a letter of support for this project.** It involved three communities in Ontario, including the Near North, to create an autonomous independent planning organization.
- 2009 – **MCSS funded Evaluation of Person-Directed Planning Demonstration Project.** This project evaluated the work done by those organizations who received Foundation Dollars. Evaluator was Carolyn Sherk.

- 2009 – **MCSS funded project and evaluation. An Evaluation Report compared planning done by a service providing agency, planning done by APSW's and independent facilitation.**
- 2010-2012 – Families for a Secure Future loses their core funding and begins exploring hybrid model of fee for service and grants. Documents their experience in: "Fee for Service" funding model for Independent Unencumbered Facilitation and Person-Directed Planning Organizations: An analysis based on two years of experience within Families for a Secure Future
- August 2011 – Individualized Funding – *A Framework for Effective Implementation* – National Individualized Funding group created and distributed this document
- 2011 - Families for a Secure Future writes paper "The Future of Independent Unencumbered Facilitation and Person-directed Planning in Ontario: What is at Stake?"
- 2011 - John Lord and Peggy Hutchison, write Pathways to Inclusion: Building a New Story with People and Communities.
- 2012 – Funds earmarked for the Real Plans for Real Life program at CAO are cancelled and redirected to support additional case management services at Service Coordination Ottawa.
- 2012-2013 - Ministry funds the Person-Directed Planning Capacity Building Initiative providing funding to build capacity and knowledge transfer among people interested in learning about Independent Facilitation and offering training for families.
- 2014 - CAO requested by the Regional Office of MCSS to provide independent person-directed planning for up to 60 individuals and families using person-directed planning funds.
- 2015-2017 – **Ministry funds the Independent Facilitation Demonstration Project**
- 2017 – 2019 **Ministry extends funding** to the initial seven Independent Facilitation Organizations involved in the independent facilitation demonstration project.



OIFN Collective Impact Data Collection – April 1 – September 30, 2018

Preliminary Analysis of Q1 and Q2 Collective Impact

Within the period of April 1 – June 30, 2018:

- 70 people were planning for individualized housing solutions
- 175 people were working on school to adult transitions
- 81 formal planning events were held
- 48 support networks were established
- 82 support networks were sustained
- 562 valued social roles were attained, enhanced or sustained

Within the period of July 1 – September 30, 2018:

- 74 people were planning for individualized housing solutions
- 171 people were working on school to adult transitions
- 58 formal planning events were held
- 47 support networks were established
- 74 networks were sustained
- 612 valued social roles were attained, enhanced or sustained

Comparison to Year 1 to Year 3 data

	Year 1	Year 2	Year 3	Year 4 Six months only	Total
Individualized Housing Solutions	42	125	147	144*	458*
School to Adult Transitions	80	234	219	346*	879*
Planning Events	71	177	170	139	557
Support Networks (Established)	37	63	71	95	266
Support Networks (Sustained)	7	42	77	156*	282*
Valued Social Roles (single roles only)	179	567	623	767	2136

*Not unique people as some people in Q1 are repeated in Q2; similarly some networks sustained in Q1 continue to be sustained in Q2.



OIFN Working Definition of Complex Life Circumstances:

This working definition consists of nine particular factors that we believe contribute to a person's life circumstances being/becoming complex. The factors included in this working definition focus more on particular circumstances the person and their families may be experiencing at this point in their lives than on diagnostic information. The assessment of complex life circumstances includes only those factors that are reported to us by either the person, their family or care provider. Below is a definition of each of the 9 factors:

1. Family income — others in the person's family are receiving ODSP income support or other types of fixed income supports that may impact on their ability to access resources.
2. Dual Diagnosis - where the person has both a developmental disability and a mental health challenge.
3. Illness/Sensory or Physical Impairment/Addiction – Person experiences illness/health challenges; sensory or physical impairment including mobility. This factor also includes circumstances where the person or someone in the family reports having an addiction or being treated for addiction.
4. Needs support urgently-where one or more of the following factors are present:
 - a. domestic and/or sexual violence is present in home:
 - b. suicidal issues in family
 - c. threat of homelessness
 - d. terminal diagnosis or severe illness of caregiver
 - e. recent death of a caregiver
 - f. caregiver living with mental health challenges
 - g. impending discharge from institution or care facility
 - h. self injurious behaviour and/or harm to others
 - i. elderly caregivers over 80 years old and experiencing overwhelm
5. At risk of hospitalization or incarceration-where person is at imminent risk, for whatever reason, of placement within a hospital, psychiatric institution, long-term care facility or incarceration in a detention facility.
6. Complex medical needs — where daily medical intervention and/or assistance is required by a nurse or other medical professional (ex. Registered health professional).
7. English as a Second Language (ESL) — where English is not the first language of the person and the family and/or it has an impact on our ability to communicate effectively.

8. American Sign Language (ASL): where American Sign Language is the primary language of the individual.

Note: Interpreter Needed - where the family asks for language or ASL interpretation services or where they must have a family member/friend or paid person offer ASL or language interpretation in order to communicate effectively.