

SEARCH ENGINES	SEARCH TERMS USED (DESCRIPTORS)	SOURCE/CITATION	ABSTRACT, COUNTRY, and KEY WORDS
	RECEIVED FROM TIM VIA EMAIL	Fisher, K. R. & Purcal C. (2010, July). Effectiveness of Individual Funding for disability support. <i>Social Policy Research Centre Newsletter</i> , 4-7.	
Ebsco host-Academic Search Complete	individualized funding	Smith, P. (2003). Self-Determination and Independent Support Brokerage: Creating Innovative Second-Level Supports. <i>Mental Retardation</i> , 41 (4), p. 294-298.	<p>Country: USA</p> <p>Focuses on how individualized funding and support brokerage can contribute towards self-determination in people with developmental disabilities. Benefits offered by individualized funding structures; History of support brokerage; Overview of the work of independent support brokers.</p>
Ebsco Host-Academic Search Complete	Self direct* AND Disability	Matthias, R. E., & Benjamin, A. E. (2008). Paying Friends, Family Members, or Strangers to Be Home-Based Personal Assistants: How Satisfied Are Consumers?. <i>Journal of Disability Policy Studies</i> , 18(4), 205-218.	<p>Country: USA</p> <p>Author-Supplied Keywords:</p> <ul style="list-style-type: none"> consumer direction family caregivers home care paid caregiving personal assistance satisfaction <p>This study describes consumers who hire friends, family members, or strangers as paid personal assistants and compares service satisfaction among the three groups. From surveying 511 consumers of self-directed home care services, the authors found that consumers who hire friends as workers are younger and more educated than consumers who hire family members</p>

			<p>and strangers, and they are more impaired than consumers with strangers as workers. The friend cohort experiences more stability with their personal assistants than does the stranger cohort but not as much stability as the family cohort. On some dimensions of consumer satisfaction, friends as workers are perceived by consumers to be either the same as or better than strangers, but they also are perceived as either the same as or worse than family workers. Using friends as paid workers is an important resource. Researchers and policy makers should further explore this approach because the need for home-based personal assistance continues to increase.</p>
<p>Ebsco Host-Academic Search Complete</p>		<p>Wehmeyer, M. L., Parent, W., Lattimore, J., Obremski, S., Poston, D., & Rousso, H. (2009). Promoting Self-Determination and Self-Directed Employment Planning for Young Women With Disabilities. <i>Journal of Social Work in Disability & Rehabilitation</i>, 8(3/4), 117-131.</p>	<p>Country: USA</p> <p>Author-Supplied Keywords: career development customized employment gender equity intellectual and developmental disabilities self-determination self-directed planning self determination</p> <p>Self-determination, choice, and preference have become important issues in vocational rehabilitation and have long been staples of social work practice. This article provides an</p>

			<p>overview of a model, the self-determined career development model, which is designed to enable people with disabilities to self-direct planning that leads to employment. Specifically, this model is applied to young women with intellectual and developmental disabilities to obtain non traditional employment through self-regulated, customized employment planning. This article examines issues pertaining to self-determination in the context of vocational guidance and planning, introduces the model and its use in secondary education and rehabilitation, and discusses the role of social workers in supporting consumer control and self-direction</p>
Ebsco host-Academic Search Complete	individualized AND funding	Hall, A., Freeze, S., Butterworth, J., & Hoff, D. (2011). Employment funding for intellectual/developmental disability systems. <i>Journal of Vocational Rehabilitation</i> , 34(1), 1-15.	<p>Country: USA</p> <p>Funding is a central tool for improving the quality and range of employment service options. While outcome-based funding models are more common in the Vocational Rehabilitation system, there is a need for funding structures in intellectual and developmental disabilities (IDD) service systems that signal a clear preference for high-quality, cost-effective integrated employment outcomes. In an environment of increasing fiscal demands and limitations, and expansion of self-directed services and individualized budgeting, state IDD systems must</p>

			<p>engage in rate-setting and funding discussions that are rooted in their priorities and long-term goals. This paper explores rate-setting methodologies, rate structures, and incentives for integrated employment, and the relationship between funding, policies, and priorities. A detailed analysis within five states yields lessons for other state IDD systems as they contend with evolving funding structures that respond to fiscal pressures and demands. Implications include the need for funding to be seamless, goal-focused, and connected to and consistent with larger systems strategies.</p>
<p>Ebsco Host-Academic Search Complete</p>	<p>direct AND funding</p>	<p>Bogenschutz, M., Hewitt, A., Hall-Lande, J., & LaLiberte, T. (2010). Status and Trends in the Direct Support Workforce in Self-Directed Supports. <i>Intellectual & Developmental Disabilities, 48</i>(5), 345-360.</p>	<p>Country: USA Self-directed programs that allow individuals with intellectual and developmental disabilities to exercise greater control over their finances have become increasingly common in recent years. At the same time, challenges in the recruitment, retention, and training of direct support workers in the field have grown more acute. In this article, the authors investigate the status of the direct support workforce for people using self-directed supports in 1 Midwestern state, based on the results of a state wide survey of service users. Although additional research is needed, the results of this study suggest that</p>

			<p>people who use self-directed funding options are satisfied with their ability to direct staffing, though challenges remain.</p> <p>Among these challenges, the presence of higher than expected wages but lower than expected benefits provision compared with traditional services may have serious policy and staff retention ramifications that affect the long-term viability of self-directed funding options, In addition, staff training remains a challenge, with service users in this sample reporting low rates of training beyond a general skill set. Implications of these findings are discussed.</p>
<p>UBC Library-search Journal of Intellectual and Developmental Disability- within this journal search individualized funding</p>	<p>individualized funding</p>	<p>Moseley, C. R. (2005). Individual Budgeting in State-Financed Developmental Disabilities Services in the United States. <i>Journal of Intellectual and Developmental Disability, 30(3)</i>, p.165-170.</p>	<p>Country: USA</p> <p>Background This paper reports the findings of a study of individual budgeting practices in state-financed developmental disabilities services in the United States. The study's purpose was to describe key process components and methodological variables integral to consumer-controlled, individual budgeting formats employed in state-funded services.</p> <p>Method- The study was conducted in two phases: a national survey sent to state agency directors in all 50 states plus Washington DC, and an</p>

			<p>in-depth assessment of individual budgeting practices in nine selected states.</p> <p>Results Data received from 84% of state developmental disabilities agencies contacted indicated considerable variability in the formats employed by states to: determine support needs of eligible individuals; equate needs to specific services; and set an amount of funding sufficient to pay for identified supports.</p> <p>Conclusions No single individual budgeting method is universally accepted by all state agencies. State practices differ significantly from one jurisdiction to another, although most follow a developmental, statistical or mixed methodology.</p>
<p>Ebsco Host-Academic Search Complete</p>	<p>Self direct* AND Disability</p>	<p>Barczyk, A. N., & Lincome, J. (2010). Cash and Counseling: A Model for Self-Directed Care Programs to Empower Individuals With Serious Mental Illnesses. <i>Social Work in Mental Health</i>, 8(3), 209-224.</p>	<p>Country: USA</p> <p>Author-Supplied Keywords:</p> <ul style="list-style-type: none"> cash and counseling empower personal assistance services self-directed care serious mental illness <p>Mental illness is the country's leading cause of disability. However, approximately 60 percent of individuals with serious mental illness (SMI) are not receiving stable, ongoing treatment (Carper, 2005). One approach to combat</p>

			<p>this problem is to actively involve consumers in their treatment. Personal assistance services (PAS) assist individuals with disabilities with their daily living activities, and some, such as cash and counseling (C&C), empower individuals to make their own treatment decisions. Self-directed care programs have recently adapted from C&C programs targeting individuals with physical disabilities to models targeting individuals with SMI. The purpose of this article is to examine the effectiveness of these programs, explore their impact on individuals with SMI, and discuss the role of social workers in this new service delivery approach</p>
<p>Ebsco Host: Academic Search Complete</p>	<p>Self direct* AND Disability</p>	<p>E. Richard, B., Philip M., F., & Dianne L., F. (2000). Slidin' into home: Supporting self-determination through personal support agents and service brokerage strategies. <i>Journal of Vocational Rehabilitation</i>, 15(2/3), 111.</p>	<p>Country: USA</p> <p>Subject Terms: *PEOPLE with disabilities -- Housing</p> <p>The last three decades of deinstitutionalization have not fulfilled their promise of creating full lives in inclusive communities for persons with intellectual disabilities. There are too many adults still living with their aging parents, or in regimented group homes that seem like nothing more than smaller versions of the institutions they left. The recent initiatives for self-determination and self-directed services hope to restructure our approach to providing support and thereby finally</p>

			<p>fulfill the promise of building inclusive communities. This paper provides an informal case study of how one young man and his family have benefited from this move to self-directed services. We tell the story of Ian Ferguson moving into a home of his own. As part of that story, we describe two support strategies that have emerged as crucial to the success of his living a life on his own. We describe the Personal Support Agent (PSA) and Community Service Brokerage (CSB), connect them with the principles of self-determination and report how they have actually been applied in Ian's life.</p>
<p>Ebsco Host-Academic Search Complete</p>	<p>Cash and counseling AND Disability</p>	<p>Powers, L. E., Sowers, J., & Singer, G. S. (2006). A Cross-Disability Analysis of Person-Directed, Long-Term Services. <i>Journal of Disability Policy Studies</i>, 17(2), 66-76.</p>	<p>Country: USA</p> <p>Subject Terms:</p> <ul style="list-style-type: none"> *OLDER people -- Care *LONG-term care of the sick *DEVELOPMENTALLY disabled *PEOPLE with mental disabilities *MEDICAL care <p>Person-directed service models have emerged as important initiatives in improving long-term care. Person-directed services typically have been targeted to particular groups, such as persons with mobility or developmental disabilities or elders with disability. Few attempts have been made to analyze the commonalties, differences, and relative efficacy of the various</p>

			<p>models. This article presents a cross-disability review of the common elements of person-directed services, describes three primary types of models (personal assistance services, brokered support, and cash and counseling), and summarizes the research evidence related to their efficacy. The major barriers that impede the expansion of person-directed services are discussed. Emerging research findings across disability groups suggest that person-directed services have a positive impact on factors such as quality of life, control, productivity, unmet need, use of preventative health care, and cost. The need to build the evidence base for person-directed services, to address barriers to the expansion of these service models, to support advocacy efforts, and to bolster the political will required for directing substantial resources to person-directed long-term services is emphasized.</p>
<p>Ebsco Host-Academic Search Complete</p>	<p>Cash and counseling AND Disability</p>	<p>Simon-Rusinowitz, L., Mahoney, K. J., Loughlin, D. M., & Sadler, M. (2005). Paying Family Caregivers: An Effective Policy Option in the Arkansas Cash and Counseling Demonstration and Evaluation. <i>Marriage & Family Review</i>, 37(1/2), 83-105</p>	<p>Country: USA Author-Supplied Keywords: consumer direction Paying family caregivers</p> <p>Subject Terms: *CAREGIVERS *PEOPLE with disabilities -- Care *CARE of people *VOLUNTEERS *MEDICAL personnel-</p>

			<p style="text-align: center;">caregiver relationships</p> <p>Informal family assistance is often a key factor in determining whether a person with a disability can live in a community setting. However, the practice of paying relatives as caregivers remains controversial. This article reports findings from the Cash and Counseling Demonstration and Evaluation (CCDE) in Arkansas, in which consumers receive a cash allowance to purchase personal assistance services. In this comparison of consumers who hired family vs. non-family workers, consumers who hired relatives received more service and had equal or superior satisfaction and health outcomes, as compared to those who hired non-relatives. Findings are further clarified by drawing from worker focus group reports and program experience, and policy issues are specifically addressed.</p>
<p>Ebsco Host: Academic Search Complete</p>	<p>Cash and counselling AND Disability</p>	<p>Loughlin, D. M., Simon-Rusinowitz, L., Mahoney, K. J., Desmond, S. M., Squillace, M. R., & Powers, L. E. (2004). Preferences for a Cash Option Versus Traditional Services for Florida Children and Adolescents with Developmental Disabilities. <i>Journal of Disability Policy Studies</i>, 14(4), 229-240.</p>	<p>Country: USA</p> <p>Subject Terms:</p> <ul style="list-style-type: none"> *DEVELOPMENTALLY disabled children *DEVELOPMENTALLY disabled *PEOPLE with disabilities -- Services for *DEVELOPMENTAL disabilities *HEALTH services administration

			<p>Traditional personal assistance programs often lack a significant consumer-direction focus that allows or encourages consumers to be in charge of their services. Independent evaluations of the Cash and Counseling Demonstration and Evaluation (CCDE) project are comparing costs of, quality of, and satisfaction with traditional personal care services versus consumer-directed cash benefit and information services. Because the disability community is composed of diverse subgroups, each group having with its own needs and concerns, the interests of each of these various populations should be assessed. This article presents the results of a telephone survey conducted in Florida as background research for the CCDE project to assess the interest in a cash option among families of children and adolescents with developmental disabilities. The findings indicate overall high levels of interest in the cash option, especially among individuals who were willing to pay a worker directly, persons who desired more involvement with services, and consumers dissatisfied with the current services. The authors of this article also include suggestions regarding how to communicate with families when informing them of such an option.</p>
JSTOR	Direct funding AND disability	Heller, T., Miller A. B., & Hsieh K. (1999). Impact of a Consumer-Directed Family Support Program on Adults	<p>Country: USA Key Words: cash subsidy,</p>

		<p>with Developmental Disabilities and Their Family Caregivers. <i>Family Relations</i> 48(4), Interventions for Family Caregivers, p. 419-427.</p>	<p>consumer direction developmental disability financial support</p> <p>In the current study we examined the impact of family support programs for adults with developmental disabilities. Results of the study indicated that participants had fewer unmet needs and used more services than the control group. Participant caregivers were more satisfied with the services their relative received, experienced greater self-efficacy, and were less likely to desire an out-of-home placement than the control group. Participants with developmental disabilities experienced increases in community integration and monthly wage.</p>
<p>UBC library main search page</p>	<p>Individualized Funding</p>	<p>O'Brien, J. (2001). <i>Paying Customers are Not Enough: The Dynamics of Individualized Funding</i>. Syracuse University, Center on Human Policy.</p>	<p>Country: USA</p> <p>Discussion of the dynamics of individualized funding for providing services to people with developmental disabilities focuses on how individual funding may drive the changes necessary to develop services that offer highly customized assistance. This discussion considers why the concept of paying customers is powerful but misleading in light of such realities as the mismatch between what is wanted and what is offered, the lack of competition in the market for developmental disability services, and</p>

			<p>the need for customized services to be provided not at a single point but over long periods of time as people's requirements change. It suggests that what is needed is a market that stimulates innovation. Policymakers are urged to harness three interlocking processes: variation (many agents pursue different strategies in a shared environment); interaction (agents create exchanges, make use of things, and inform themselves about other agents' strategies; and selection (of some strategies over others). The paper suggests that a system with the best chance of continuing adaptability and success must have: (1) lots of agents; (2) some connections among agents; and (3) willingness and ability to try and tell. Policies and structures are judged by the criterion of whether, over time, people with disabilities and their families are more able to act as agents in customizing the assistance they require. (DB)</p>
<p>UBC Library Main Search Page</p>	<p>“Individual* Funding”</p>	<p>O’Brien, J. (1999). <i>Community Engagement: A Necessary Condition for Self-Determination and Individual Funding</i>. Responsive Systems Associates from the Center on Human Policy, Syracuse University for the Research and Training Center on Community Living.</p>	<p>Country: USA</p> <p>Descriptors/Keywords: Accessibility (for Disabled); Adults; Advocacy; Attitude Change; Community Involvement; Community Programs; Community Support; Depleted Resources; Disabilities; Financial Needs; Independent</p>

			<p>Living; Models; Political Power; Resource Allocation</p> <p>This report discusses the need to provide people with disabilities with accessible opportunities for community contribution and to provide the individualized supports and assistance necessary to enable their participation. Two strategies are discussed for realizing these objectives: adequate individual funding controlled by people with disabilities and their families and friends; and a process of culture change through community engagement. Two models of the community engagement process are presented that directly involve more people and associations and promote higher levels of organization among people with disabilities and their families and friends. Possibilities for action are described and include: (1) create more family groups; (2) support leadership from among people with disabilities; (3) tell powerful stories; (4) keep person-centered planning vital and outside the orbit of the service system; (5) maintain clear links to political action while pursuing a distinct strategy; (6) develop cooperative projects; and (7) offer formal learning opportunities. (CR)</p>
<p>http://www.hcb.org/moreInfo.php/doc/834</p>	<p>Received from Home and Community Based Services website- <u>Under topic:</u></p>	<p>Powers, L. (2004). <i>Self Determination and Person-Directed Support</i>. Grantee produced, Oregon RC grantee.</p>	<p>Country: USA</p> <p><u>Key words:</u> Real Choice Systems Change; self determination; person-directed supports</p>

	Developmental/Intellectual disabilities <u>Search term used:</u> Self determination		This paper discusses at some length the history of the evolution of self determination and consumer-directed supports. It contains an excellent bibliography of available references.
http://www.hcb.org/moreInfo.php/nb/doc/3131/Self_Determination_Is.._-_Video and offsite link: http://www.nc-ddc.org/video/self-determination-complete.html	Received from Home and Community Based Services website- <u>Under topic:</u> Developmental/Intellectual disabilities <u>Search term used:</u> Self determination	<i>Self-Determination Is..</i> (2010). North Carolina Council on Developmental Disabilities.	Country: USA <u>Key Words:</u> Advocacy; Community Inclusion; Independent Living Twelve voices define self determination and the challenges it faces with current attitudes and policies toward individuals with disabilities who want to take charge of their own lives. View five segments of the 16 minute video, view the complete video, or contact the Council for your own DVD copy.
UBC Library Main Search Page	Direct Payments	Glasby, J., Littlechild, R. (2009). <i>Direct payments and personal budgets: putting personalisation into practice</i> . Portland, OR: Policy Press.	Country: UK and USA
http://www.centerforself-determination.com/sd.html	Received from the Centre for Self-Determination website <u>Search process:</u> Resources, Articles, and then Self-Determination	Nerney, T. & Harris, K. <i>Center for Self-Determination Policy Analysis of New Jersey's Self-Determination Effort</i> .	Country: USA The meaning of self-determination since its inception a decade ago has always rested on a set of principles: Freedom, Authority, Support, Responsibility and now Confirmation of the important role that individuals with disabilities must play in the development of this movement. In this ten-year time frame

			<p>our understanding of self-determination has deepened and broadened. New and highly relevant issues surface as more and more individuals in states across the country begin to implement self-determination for themselves, and issues surface as well for the systems that are the stewards of public funds. Just as individuals with disabilities and families have taught us so much as they gain control of the funding, so, too, have we learned about the systems change elements that make the goal of self-determination more attainable.</p>
<p>http://www.centerforself-determination.com/sd.html</p>	<p>Received from the Centre for Self-Determination website <u>Search process:</u> Resources, Articles, and then Self-Determination</p>	<p>Nerney, T. <i>Communicating Self-Determination: Freedom, Authority, Support and Responsibility.</i></p>	<p>Country: USA</p> <p>With the vast extension of self-determination projects across the country and the wide adoption of the principles of self-determination, it may be helpful to step back for a moment and reflect on what we have learned thus far about some of the technical and structural issues associated with truly successful individual budgets, support brokering and fiscal intermediaries. Not every issue is yet crystal clear and it is anticipated that some ambiguity may remain especially in those projects that are still experimenting with systems change.</p>
<p>http://www.centerforself-determination.com</p>	<p>Received from the Centre for Self-Determination</p>	<p>Nerney, T., Crowley, R., & Kappel, B. <i>An Affirmation of Community A Revolution of Vision and Goals Creating a Community to Support All People Including those with</i></p>	<p>Country: USA</p> <p>Maybe it is the times, or maybe it is the</p>

om/sd.html	website <u>Search process:</u> Resources, Articles, and then Self-Determination	<i>Disabilities.</i>	fact that we have had some time to examine how it is that we interact with and support children and adults with disabilities in communities. Or maybe it is simply that people with disabilities are sick and tired of being controlled by others. Whatever the reason, self-determination has emerged as the agenda of the 90's. As Bob Williams says: "Self-determination is just another word for freedom." Freedom to live with whom you want, freedom to live a productive life, freedom to attend school with your friends and brothers and sisters, freedom to get around your community, freedom to love and reject.
http://www.centrforself-determination.com/new.html	Received from the Centre for Self-Determination website <u>Search process:</u> Resources, Articles, and then New Articles	Nerney, T. <i>The Purpose of Public Funding for Individuals with Disabilities.</i> Centre for Self-Determination.	Country: USA The failure of public policy to adequately address the issue of the common humanity of individuals with disabilities has resulted in the substitution of human services and human service environments and programs for real life and high purpose. Individuals with disabilities have become human service subjects within a system of long-term supports that has no expectations that common life goals based on universal human aspirations can add great depth to the notion of addressing the health and welfare of individuals with disabilities.
http://www.centrforself-determination.c	Received from the Centre for Self-Determination	Nerney, T. <i>Self-Determination: Individual Costs, System Costs and Quality of Life.</i>	Country: USA Self-Determination is a movement to

om/new.html	website <u>Search process:</u> Resources, Articles, and then New Articles		change long term care by shifting power over resources directly to individuals and their family and allies. As such it requires fundamental structural changes (fiscal management agencies, independent brokering and highly personal budgets) and a leadership commitment that moves the present system from a highly paternalistic and costly one to a system that promotes both freedom and responsibility while achieving better value for the public dollars that are appropriated.
http://www.cent erforself- determination.c om/new.html	Received from the Centre for Self- Determination website <u>Search process:</u> Resources, Articles, and then New Articles	Nerney, T. (2007). <i>The Meaning of Self-Determined Lives in Publicly Funded Systems of Long Term Care.</i>	Country: USA This first written description of "Self-Determination" was based on a set of <i>principles</i> , and in a demonstration of their efficacy, funded by a grant from the Robert Wood Johnson Foundation, targeted a group of individuals with significant brain injury and a group with developmental disabilities beginning in 1993. The principles have remained as a foundation for this effort ever since.
RECEIVED FROM CUISR LIAISON VIA EMAIL		Lynch, K., Findlay, I. M. (2007). <i>A New Vision for Saskatchewan Changing Lives and Systems through Individualized Funding for People with Intellectual Disabilities.</i> Community-University Institute for Social Research (CUISR), Saskatchewan.	Country: Canada The purpose of this report is to highlight and analyze the existing models of individualized funding (IF) and individually funded services (IFS). IF/IFS models are examples of disability supports designed to help people with disabilities overcome societal and

			<p>individual barriers or limitations so that they are able to carry out their daily activities and fulfill their daily needs. The IF/IFS models from other jurisdictions discussed in this report vary in the length of their implementation and in the number of users each program serves. Overall, the purpose of IF/IFS models is to bring to the table an alternative way of distributing monies to people with disabilities to meet their disability-related needs.</p> <p>Individualized funding has four principles:</p> <ol style="list-style-type: none"> 1) Individuals can use informal and formal support networks to develop their plans. 2) Funding allows individuals to purchase supports and services. 3) Individuals must have control over the funds. 4) Funding must be portable within jurisdictions.
	<p>RECEIVED FROM CUISR LIAISON VIA EMAIL</p>	<p>Chopin, N.S., Findlay, I.M. (2010). <i>Exploring Key Informants' Experiences with Self-Directed Funding</i>. Community-University Institute for Social Research (CUISR), Saskatchewan.</p>	<p>Country: Canada</p> <p>Self-Directed funding models provide public funds to individuals with intellectual disabilities to help them fulfil their unmet needs and allow them to reach their goals. SDF is based on principles of self-determination, choice, and equality. In a more functional sense, SDF allows persons with disabilities to choose and purchase which programs and services will</p>

			<p>support them. With these principles in mind, this report seeks to examine the complexities, challenges, and strengths associated with SDF models.</p> <p>The literature review and interviews focus on:</p> <ul style="list-style-type: none"> • sustainability of SDF • accountability measures related to the allocation of funds, including the design of appropriate reporting requirements • quality and risk management to ensure clients' funds are managed properly • labour market and staffing issues related to the availability and retention of personal support workers • equity among different user groups
	RECEIVED FROM TIM VIA EMAIL	Interim Authority for Community Living British Columbia (2003). <i>Annotated Review of Selected Consumer Directed Supports Studies</i> , BC.	Country: Canada
http://www.individualizedfunding.ca/resources.html	Received from Individualized Funding Coalition for Ontario website under Resources	Individualized Funding Coalition for Ontario (2007). <i>Transformation of Developmental Services: Expanding the Possibilities for Citizenship</i> .	<p>Country: Canada</p> <p>A Signature Paper developed by the Individualized Funding Coalition for Ontario. This document is a synthesis of many of the writings produced by the Individualized Funding Coalition for Ontario on the subject of Individualized Funding and Independent Planning and Facilitation.</p> <p>Across Canada, people with disabilities, their families, friends and</p>

			<p>others -- those in their personal networks - as well as People First, family groups, forward-thinking agencies and even governments are actively promoting citizenship and the transformation of systems and services for people with disabilities.</p> <p>The cry for change at this time in history is for people with disabilities to be able to live their lives as full citizens with the supports they need. Experiencing a good life means not being dependant on systems built on decades old principles. It means changing things for the better. We know so much more in the year 2007 than we did fifty years ago at the onset of a service system that was developed to support people with disabilities. We know that it is possible for people with disabilities to direct their own lives, often with the assistance of family, friends and others. We know that individualized funding and supports like independent planning and facilitation and network development -- building and maintaining relationships with family, friends and others -- moves us closer to empowerment for all citizens. This new knowledge and actions that are needed form the essence of this paper.</p>
--	--	--	--

<p>http://www.individualizedfunding.ca/resources.html</p>	<p>Received from Individualized Funding Coalition for Ontario website under Resources</p>	<p>Individualized Funding Coalition for Ontario (2006). <i>Rationale for Independent Planning and Facilitation in Ontario Why MCSS Should Move Quickly to Implementation</i></p>	<p>Country: Canada This document details why Ontario should provide Planning and Facilitation that is independent of service provision. Independent planning and facilitation that provides ongoing support for people with disabilities, their families and support networks over time is most important. This is a key component of individualized funding. This information is incorporated in the Signature Paper, however this document provides detailed rationale. Individualized Funding Coalition for Ontario. November 2006</p>
<p>http://www.individualizedfunding.ca/resources.html</p>	<p>Received from Individualized Funding Coalition for Ontario website under Resources</p>	<p>Dingwall, C., Kemp, K., & Fowke, B. (2006). <i>Creating a Good Life in Community-A Guide on Person-directed Planning</i>. Individualized Funding Coalition for Ontario.</p>	<p>Country: Canada A guide to assist people with disabilities, their families and friends with planning for the future. Designed by the Individualized Funding Coalition for Ontario. Writing team; Charlotte Dingwall, Kristi Kemp, Barbara Fowke. Available in Plain Language. Available in French or English. 2006</p>
<p>http://www.individualizedfunding.ca/resources.html</p>	<p>Received from Individualized Funding Coalition for Ontario website under Resources</p>	<p>Family Alliance Ontario, The Individualized Funding Coalition for Ontario, People First of Ontario, & Special Services at Home Provincial Coalition. (2005). <i>Common Vision Newsletters, Part One and Part Two</i></p>	<p>Country: Canada Two comprehensive Newsletters that reflect agreement through the ‘common vision’ of four provincial organizations with regards to transformation of developmental services in Ontario.</p>
<p>http://www.individualizedfunding.ca/resources.html</p>	<p>Received from Individualized Funding Coalition for Ontario website under Resources</p>	<p>Individualized Funding Coalition of Ontario. (2006). <i>Statement of Principles: What a direct individualized funding support system would look like for a person when these four dynamic principles are at work.</i></p>	<p>Country: Canada A two page document describing with words and pictures what life would look like in a transformed system</p>
<p>http://www.individualizedfunding.ca/resources.html</p>	<p>Received from</p>	<p>Lord, J., Snow, J., & Dingwall, C. (2006). <i>Building a New</i></p>	<p>Country: Canada</p>

vidualizedfundi ng.ca/resources. html	Individualized Funding Coalition for Ontario website under Resources	<i>Story: Transforming Disability Supports and Policy Revisiting In Unison.</i> Individualized Funding Coalition for Ontario.	Reflecting on the In Unison document and where things are at now in relation to Transformation. A commentary by John Lord, Judith Snow and Charlotte Dingwall for the Individualized Funding Coalition for Ontario.
http://www.indi vidualizedfundi ng.ca/resources. html	Received from Individualized Funding Coalition for Ontario website under Resources	Ministry of Community and Social Services. (2006). <i>The Need for Change.</i> Ontario: Canada.	Country: Canada A two page brief on the need change to a more flexible, individualized, citizenship perspective for supporting people with disabilities in Ontario.
http://www.indi vidualizedfundi ng.ca/resources. html	Received from Individualized Funding Coalition for Ontario website under Resources	Lord, J. (2006). <i>Moving Toward Citizenship: A Study of Individualized Funding in Ontario.</i> Individualized Funding Coalition for Ontario.	Country: Canada This study demonstrated that costs for individualized funding may be similar to conventional supports, but quality of life outcomes are usually much better. Recent research suggests that the emphasis on self-determination in new paradigm projects is one reason for positive outcomes. Sponsored by the Individualized Funding Coalition for Ontario. Principal Investigator: John Lord, Researchers: Kristi Kemp, Charlotte Dingwall. 2006
http://www.indi vidualizedfundi ng.ca/resources. html	Received from Individualized Funding Coalition for Ontario website under Resources	Lord, J. (2000). <i>More Choice and Control for People with Disabilities Review of Individualized Funding.</i> Ontario Federation for Cerebral Palsy.	Country: Canada The goal of this review was to develop understanding, awareness, and strategies for building the capacity of individuals, families, communities, and government to implement Individualized funding for people with disabilities in Ontario. Project Co-ordinator: John Lord, Researchers: Barbara Zupko, Peggy Hutchison. Project Coordinator: John Lord: Researchers: Barbara Zupko, Peggy Hutchison. Published by the

			Ontario Federation for Cerebral Palsy. July 2000
http://www.individualizedfunding.ca/resources.html	Received from Individualized Funding Coalition for Ontario website under Resources	Individualized Funding Coalition for Ontario. (2000). <i>Individualized Supports and Direct Funding Making Money Work for People: A Pathway to Self-Determination and Community Involvement for People with Disabilities.</i>	Country: Canada A Pathway to Self-Determination and Community Involvement for People with Disabilities The Ontario Round Table for People with Disabilities purposed to develop a policy framework, province-wide principles, and directions for Individualized Funding, as well as identifying strategies for implementation. Sponsored by the Individualized Funding Coalition for Ontario. May 2000
UBC Library main search page	Individualized Funding	Ahmed, S., Keller, C., Gorman, J., Syme, R., MacPhail, A. (2004). Managing Three Key Risks in Individualized Funding for Autism Programs (report). Vancouver BC: Ministry of Children and Family Development.	Country: Canada Executive Summary We have completed our assessment of the Ministry of Children and Family Development's (the ministry) ability to respond to the following selected risks associated with the Interim Early Intensive Intervention (IEII) and Extended Autism Intervention (EAI) programs: <ul style="list-style-type: none"> • some families may lack the capacity to manage funds and/or treatment; • expectations for the ministry and families may not be clear; and <ul style="list-style-type: none"> • some families might misuse program funding. We found that many families are

			<p>experiencing difficulty with these individualized funding programs. Regional staff advised that most parents are not complying with the programs' accountability requirements, and social workers are experiencing an overwhelming volume of questions from parents. In our view, the ministry is not well positioned to address the risk that families may lack the capacity to manage individualized funding. The regions advised us they are unable to administer the programs as intended, due to a lack of resources, so families are not receiving the ongoing feedback and assistance needed to manage the program successfully. There are few supports available to build family capacity, and also very limited programming options for families who do not have the capacity to manage individualized funding. In our opinion, the ministry needs to more clearly communicate program expectations.</p> <p>The program materials were consistently faulted for not communicating program expectations effectively, particularly parents' responsibility to develop and manage treatment plans for their children. There are limited resources available to parents seeking information on these matters, and regions are not able to respond to the volume of inquiries from parents.</p>
--	--	--	--

<p>Ebsco-Academic Search Complete</p>	<p>Individual* funding</p>	<p>Lord, J., & Hutchison, P. (2003). Individualised Support and Funding: building blocks for capacity building and inclusion. <i>Disability & Society</i>, 18(1), p. 71.</p>	<p>Country: Canada</p> <p>Subject Terms: Disabilities Communities Guardian & Ward</p> <p>The paradigm in disability supports is shifting away from institutional services and professional control towards self-determination and community involvement of people with disabilities. The assumption that the best way to provide disability supports is for government to give money to agencies or services, rather than directly to people with disabilities and their support networks, is being challenged. This article reports on findings and themes fruit: a Canadian study that investigated individualised funding projects from different parts of the world. Ten of fifteen of the most 'promising initiatives' were selected for more detailed study and analysis. Projects analysed were from Canada, the US, and Australia. Themes emerging from the study included the fact that values and principles mattered, a policy framework provided coherence and equity, infrastructure supports for individuals were separate from service system, the facilitator-broker role differed from case management, allocation of individualised funds was designed to be equitable and accountable to the funder</p>
---------------------------------------	----------------------------	--	--

			and person, and a 'learn as you go' philosophy maximised positive outcomes. This research project demonstrates that individualised support and funding , when embedded in the new paradigm of disability and community, builds capacity of individuals , families and communities
Ebsco Host: Social Work Abstracts	Direct payment*	Stainton, T. T. (2002). Taking rights structurally: disability, rights and social worker responses to direct payments. <i>The British Journal of Social Work</i> , 32(6), 751-763.	<p>Country: UK/Canada</p> <p>Subjects: Disabilities Reimbursement Social workers</p> <p>This article examines the link between a justice and rights discourse and disability policy and practice. Specifically, it considers social worker responses to direct payments, a policy which has been linked to a discourse of social justice and rights. The article initially considers the nature of justice and rights, arguing that these can plausibly be seen to be grounded in the idea of autonomy and that a rights or justice-based social policy and practice must be grounded in the protection, enhancement, and development of the capacity for autonomous action. The article then presents partial findings of a research project, which sampled social workers' views and attitudes towards direct payments in three local authorities. The findings suggest that social workers are aware of the link between direct payments and autonomy</p>

			and are generally very supportive of the move to a rights -based approach to policy and practice as evidenced by programs such as direct payments. The paper also concludes that structural constraints limit social workers' ability to fully function from a rights -based approach to disability.
UBC library main search page	Individualized funding	Lord, J. and Hutchinson, P. (2008). Individualized Funding in Ontario: Report of a Provincial Study. <i>Journal on Developmental Disabilities, 14</i> (2), 44-53.	<p>Country: Canada</p> <p>Key Words: individualized funding Individualized Coalition of Ontario facilitators</p> <p>Individualized funding for people with developmental disabilities is increasingly being seen as valuable for self-determination and inclusion. Recently, the Individualized Coalition of Ontario commissioned a study to explore the practice of individualized funding. The researchers examined 130 files of people receiving individualized funding and interviewed 18 families. The results showed that people with individualized funding experienced positive outcomes. The support plan provided a foundation for building a good life. Facilitators played a major role in assisting people with planning and network development. Individuals</p>

			<p>and families generally received less funding than they requested and funding often came from multiple government sources. Although families were generally very satisfied with individualized funding, they raised a number of concerns.</p>
<p>UBC Library Main search page</p>	<p>Individualized Funding</p>	<p>Jensen, M. (2008). <i>Creating individualized services for people with developmental disabilities</i>. Unpublished Masters' Thesis, Royal Roads University, Canada.</p>	<p>Country: Canada</p> <p>The purpose of this study was to explore the intricacies involved in creating safe, effective, individualized services for people with developmental disabilities. Community Living British Columbia (CLBC) has adopted a new approach where people with developmental disabilities receive individualized funding to purchase or create the support services they require. Community Living Victoria (CLV) is one of the first service providers to become a host agency which enables CLV to receive and disperse individualized funds to qualified care providers on behalf of the individual. CLV is committed to promoting full citizenship and inclusion for people with developmental disabilities along with their families, and has altered its service methods to adapt to this paradigm shift within the community living sector. This project has determined how to deliver these services, while ensuring all</p>

			safeguards are in place in order to assist people with disabilities and their families create the supports they require.
--	--	--	--