

# Coordinated Service Planning: Proposal Instructions and Template

## Ontario's Special Needs Strategy for Children and Youth

September 2014

Ministry of Children and Youth Services

Ministry of Community and Social Services

Ministry of Education

Ministry of Health and Long-Term Care



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# **SECTION ONE: PROPOSAL DEVELOPMENT INSTRUCTIONS**

## PART 1A: DIRECTION FOR CHILDREN'S COMMUNITY AGENCIES, HEALTH SERVICE PROVIDERS AND DISTRICT SCHOOL BOARDS

The implementation of local coordinated service planning in every service delivery area in the province will improve service experiences and outcomes for children and youth with multiple and/or complex special needs and their families. Although coordinated service planning is happening now in some sectors and communities, it is not always consistently available across the service delivery area and does not always cover the broad range of health, education and children's services that children and youth with multiple and/or complex special needs often need.

The goal of this process is to design and implement a system of coordinated service planning that builds on existing local practices, or even introduces entirely new practices, to better meet the needs of children and youth with multiple and/or complex special needs through a level of consistency and minimum standards as outlined in the accompanying document: *Coordinated Service Planning: Guidelines for Children's Community Agencies, Health Service Providers, and District School Boards*. This may involve redesigning existing local coordinated service planning, redefining existing partnerships, repurposing existing funding, and/or expanding an individual agency model across the service delivery area.

Each proposal development table will be asked to develop a proposal that will describe a local process for coordinated service planning and propose an agency that will be responsible for coordinated service planning. As a starting point for this work, the ministries recommend that proposal development tables collaboratively design an ideal system of local, family-centred coordinated service planning irrespective of what currently exists. The needs of the children and youth and their families should be placed ahead of the priorities of individual organizations and sectors, and partnerships and relationships should be assessed in light of the ideal future state of coordinated service planning. Parents of children and youth with multiple and/or complex special needs and youth with multiple and/or complex needs must be consulted and engaged as early as possible in this exercise (see Section 2, Part 2G: Parent and Youth Engagement Summary). In addition, proposal development tables will be expected to engage the broader community of service providers and organizations involved in service delivery for children and youth with multiple and/or complex special needs in their service delivery area.

After having agreed upon a plan for achieving the vision of coordinated service planning – outlined in the accompanying document: *Coordinated Service Planning: Guidelines for Children's Community Agencies, Health Service Providers, and District School Boards* – for the delivery of coordinated service planning for children and youth with multiple and/or complex special needs in the community, the ministries recommend that proposal development tables

identify all available resources for coordinated service planning, human and financial, to identify current capacity for delivery. Following this, discussions should begin regarding which agency would be in the best position to serve as the Coordinating Agency for coordinated service planning in the service delivery area.

Finally, the proposal development tables may identify barriers to realizing the vision of coordinated service planning and propose solutions to these barriers. The proposal development tables may consider options such as sub-contracting and the repurposing of existing resources in order to achieve the goal of coordinated service planning.

Your energy, dedication and expertise are critical to the success of this strategy. The ministries are committed to working with you to make this strategy work, so children and youth with multiple and/or complex special needs and their families can get the services they need, where and when they need them, and service experiences can be improved.

## PART 1B: INTRODUCTION

This guide sets out expectations for the development of local proposals to implement family-centred, community-based coordinated service planning for children and youth with multiple and/or complex special needs across the province. Service delivery areas should refer to the September 2014 document, *Coordinated Service Planning: Guidelines for Children's Community Agencies, Health Service Providers and District School Boards*, during the development of their proposals.

Proposal development tables will be convened in each service delivery area in order to prepare proposals for the ministries of Children and Youth Services, Community and Social Services, Education, and Health and Long-Term Care.

The following agencies/entities will be most impacted by the implementation of coordinated service planning and are required to be signatories on the service delivery area proposal:

- Applied Behaviour Analysis (ABA)-based services and supports lead agencies;
- Children's Treatment Centres (CTCs);
- Children's agencies that provide inter-agency service coordination;
- Autism Intervention Program (AIP) providers;
- Local Health Integration Networks (LHINs);
- Community Care Access Centres (CCACs); and
- District School Boards/School Authorities.

Other agencies and providers may also have significant roles to play in the development and implementation of coordinated service planning under the Special Needs Strategy and therefore may have a strong interest in participating in proposal development, but are not required members of the table. These may include:

- Infant Development Program agencies;
- Infant Hearing Program & Blind-Low Vision Program lead agencies
- Preschool Speech and Language (PSL) Program lead and partner agencies;
- Healthy Babies Healthy Children Program;
- Best Start Networks;
- Children's developmental service agencies;
- Municipalities (including District Social Services Administration Boards and Consolidated Municipal Service Managers);
- Children's mental health agencies; and/or
- Children's respite agencies.

Each required member of the proposal development table is expected to sign off on the proposal by submitting a signed copy of the Proposal Development Table Confirmation (see Section 2, Part 2I: Proposal Development Table Confirmation). Other agencies and providers may also sign off if they are members of the proposal development table; however, their signatures will not be a requirement for proposal submission.

The ministries have scheduled several checkpoints into the timelines for proposal development and implementation of coordinated service planning (see Section 1, Part 1F: Proposal Development Timelines). The purpose of these checkpoints is to provide set dates at which the service delivery areas can update the ministries on their progress and receive guidance or assistance if/when required.

It is expected that youth with multiple and/or complex special needs, as well as their parents and families, will be consulted and involved throughout the proposal development process and that the proposal development table's proposals to the ministries will reflect their input (see Section 2, Part 2G: Parent and Youth Engagement Summary).

The ministries are committed to working with proposal development tables that do not meet the deliverables of a particular checkpoint to address local barriers and challenges. The ministries may implement a separate selection process (e.g. an application process or appointment) from the one outlined in this document with any proposal development table that is unable to meet their expected deliverables.

## PART 1C: REGIONAL INFORMATION SESSIONS

From October 2 to October 23, 2014, the ministries are hosting a series of regional information sessions across the province.

The following types of agencies have been invited to the regional information sessions:

- Autism Intervention Program Lead Agencies;
- Applied Behaviour Analysis-based services and supports Lead Agencies;
- Agencies funded to provide inter-agency service coordination;
- Children's Treatment Centres;
- Community Care Access Centres;
- Local Health Integration Networks;
- Preschool Speech and Language Program Lead Agencies; and
- District School Boards/School Authorities.

These types of agencies have been invited because they are expected, provincially, to sign the local submissions for coordinated service planning and/or the integrated delivery of rehabilitation services. Other agencies with a role in supporting children/youth with special needs are also encouraged to participate in their proposal development tables, which will be convened following the regional information sessions.

Regional Information Sessions are an initial step in the local proposal development process. Many agencies/entities not in attendance at the Regional Information Sessions will also be important partners in the proposal development and should be included from the first stages of the community process.

Regional information sessions will:

1. Introduce participants to the:
  - a. *Integrated Delivery of Rehabilitation Services: Guidelines for Children's Community Agencies, Health Service Providers and District School Boards;*
  - b. *Integrated Delivery of Rehabilitation Services: Proposal Instructions and Template;*
  - c. *Coordinated Service Planning: Guidelines for Children's Community Agencies, Health Service Providers and District School Boards;* and
  - d. *Coordinated Service Planning: Proposal Instructions and Template* (i.e. this document).

2. Enable providers from the same service area to begin the process of determining proposal development table membership and roles and responsibilities.

Before the end of each regional information session, providers will be asked to identify who will convene the first meeting of their local proposal development table and provide this information to the ministries.

## PART 1D: PROPOSAL DEVELOPMENT TABLES

Agencies/entities in each service delivery area will be required to convene a proposal development table to develop one proposal for the new approach for coordinated service planning for children and youth with multiple and/or complex special needs, including the identification of the local Coordinating Agency in their area, as well as the specifics of coordinated service planning. Proposal development processes are required to be inclusive and collaborative. Agencies are encouraged to use internal expertise in the preparation and completion of the proposal. Government funds may not be used to procure third-party expertise in the writing of the proposal.

### Service Delivery Areas:

It is recognized that the introduction of the 34 service delivery area boundaries may involve District School Boards, health service providers and children's service agencies working with more than one proposal development table/service delivery area to develop proposals for coordinated service planning.

### Table Membership:

Agencies/entities are encouraged to build on existing, effective planning tables (e.g. Best Start Networks) to develop proposals for coordinated service planning. Local proposal development processes are required to be inclusive and reflect all relevant providers in service delivery for children and youth with multiple and/or complex special needs. Service delivery areas are also encouraged to include representation from local municipalities (i.e. Consolidated Municipal Service Managers, District Social Services Administration Boards) at proposal development tables.

A chair or two co-chairs must be identified, with the knowledge that the agency/entity selected to convene the first meeting (as determined at the Regional Information Sessions) will not necessarily be the agency/entity selected as the chair for their local proposal development table.

### Parent and Youth Engagement:

The ministries require that parents of children and youth with multiple and/or complex special needs and youth with multiple and/or complex special needs be engaged in the proposal development process. Parent and youth engagement will support proposal development table members in placing the needs of children and youth and their families first, and will ensure the proposals reflect the voices of parents and youth. Each service delivery area should determine how to best facilitate parent and youth engagement, input and feedback throughout the

proposal development process. Options may include engaging parent/youth groups and associations, including parent/family representatives at local proposal development tables, meeting with local District School Boards' Special Education Advisory Committees (SEACs), conducting focus groups with parents/youth, parent/youth testimonials, etc.

The table provided in Section 2, Part 2G: Parent and Youth Engagement Summary must be completed in order to show the level of involvement families have had in the design of local coordinated service planning.

### Checkpoints

The ministries have established a series of checkpoints for service delivery areas during the proposal development process. Each checkpoint has an associated deliverable(s) that will allow the ministries to measure progress towards the submission of proposals which meet the expectations outlined in this document and the *Coordinated Service Planning: Guidelines for Children's Community Agencies, Health Service Providers and District School Boards*. Section 1, Part 1F: Proposal Development Timelines provides more details on these checkpoints.

## PART 1E: ONE-TIME FUNDING TO SUPPORT PROPOSAL DEVELOPMENT

One-time funding in 2014-15 of up to \$40,000 per service delivery area is available to support local proposal development for a new approach to coordinated service planning. For example, funds can be used to procure a facilitator for the table, backfill a table member occupying the chair role, support local engagement/capacity building (e.g. of front-line professionals) and/or procure a data and financial analytics specialist, etc. Funds may not be used to support the completion of the actual submission (i.e. to procure an external consultant or facilitator to write the proposal template).

To request funding, proposal development tables must:

1. Complete the attached form (see Appendix 1) to submit a request for one-time funding that specifies the funding recipient on behalf of the table and the proposed use for the funds (by November 19, 2014); and
2. Provide a list of the proposal table members and chair(s) and indicate their agreement with the one-time funding request (see Appendix 1).

Similar to the processes undertaken for Best Start Network planning funding and Community Action Research proposals, proposal development tables are expected to collaboratively determine at the initial proposal development meeting which agency/entity will be the one-time funding recipient for the table.

The agency/entity responsible for convening the first planning meeting (as determined at the Regional Information Session), the chair(s) of the proposal development table and the funding recipient on behalf of the table may be the same or different, according to the consensus of the proposal development table.

## PART 1F: PROPOSAL DEVELOPMENT TIMELINES

The ministries have established a series of checkpoints for communities during the proposal development process. Each checkpoint has an associated deliverable(s) that will allow the ministries and proposal development tables to measure progress towards the submission of proposals which meet the expectations outlined in this document and the *Coordinated Service Planning: Guidelines for Children’s Community Agencies, Health Service Providers and District School Boards*. The ministries are committed to working with communities that do not meet the deliverables of a particular checkpoint to address local barriers and challenges. The ministries may implement a separate selection process (e.g. an application process or appointment) from the one outlined in this document with any service delivery area, if agencies/entities are unable to meet the deliverables below.

Date	Event	Deliverable
October 2 to October 23, 2014	Regional Information Sessions	Agency responsible for calling first meeting of the proposal development table identified
By November 19, 2014	Ministries Checkpoint #1	Table membership and chair(s) confirmed One time grant request submitted to Ministry of Children and Youth Services
By December 5, 2014	Ministries Checkpoint #2	Provincial meeting with the ministries and the local proposal development table chairs/co-chairs
By December 19, 2014	Ministries Checkpoint #3	Meetings with ministries and local proposal development tables  Identification to ministries of possible barriers related to current funding sources, policy and/or regulatory requirements
By March 5, 2015	Ministries Checkpoint #4	Proposal submitted to ministries
By March 31, 2015	Ministries Checkpoint #5	Ministries provide initial feedback on proposal
By May 15, 2015	N/A	Ministries’ approval of proposal

Date	Event	Deliverable
By July 10, 2015	Implementation Begins	On the ground service delivery begins
By October 15, 2015	Ministries Checkpoint #6	Implementation progress report by Coordinating Agency
By January 15, 2016	Ministries Checkpoint #7	Implementation progress report by Coordinating Agency

## PART 1G: RESOURCE MATERIALS FOR PROPOSAL DEVELOPMENT

The ministries have established an information portal to support the development of local proposals. The portal will be updated throughout the proposal development process to respond to requests for information and materials and to share strategies and approaches that could be used across service delivery areas.

The information portal can be accessed at <http://specialneedsstrategy.children.gov.on.ca> or by following the instructions in Appendix 2. Resources on the portal include:

### *General Information:*

- Demographics and maps for the 34 service delivery areas
- Ontario Municipal Social Services Sector Guides for Accessible Community Engagement

### *Advice to Government:*

- Services for Children and Youth with Special Needs in Ontario, and their Families: Opportunities for Improving their Experiences and Outcomes (Advice to Minister Piruzza Minister of Children and Youth Services from the Honourable Tracy MacCharles, Minister of Consumer Services and former Parliamentary Assistant to the Minister of Children and Youth Services)
- Report by Deloitte, entitled: Evaluation of Speech and Language Demonstration Sites: Final Report
- Review of School Health Support Services, Final Report
- Report on the review of the Ontario Association of Children's Rehabilitation Services (OACRS) full-day kindergarten pilots (expected October 2014)

### *Community Action Research Summary Papers:*

- Summary papers based on Community Action Research, including information on effective community planning strategies, addressing barriers to integration, achieving seamless service delivery and access/intake models

At any point during the proposal development process, questions on the Special Needs Strategy can be sent to [specialneedsstrategy@ontario.ca](mailto:specialneedsstrategy@ontario.ca) or [strategiebesoinsparticuliers@ontario.ca](mailto:strategiebesoinsparticuliers@ontario.ca) for a response from the ministries. Questions specific to the development of local proposals can also be sent to the following individuals:

- Adina Serbanescu, Policy Analyst, Ministry of Children and Youth Services, [Adina.Serbanescu@ontario.ca](mailto:Adina.Serbanescu@ontario.ca), 416-212-4233
- Helen Cooper, Manager, Operations, Ministry of Community and Social Services, [Helen.Cooper@ontario.ca](mailto:Helen.Cooper@ontario.ca), 416-325-8202
- Christine Riedel, Education Officer, Ministry of Education, [Christine.Riedel@ontario.ca](mailto:Christine.Riedel@ontario.ca), 416-314-8454
- Elisa Diaz-Martinez, Senior Policy Advisor, Ministry of Health and Long-Term Care, [Elisa.Diaz-Martinez@ontario.ca](mailto:Elisa.Diaz-Martinez@ontario.ca), 416-326-6694

The Ministry of Children and Youth Services (MCYS) website is another source for information on the Special Needs Strategy and can be accessed at [www.children.gov.on.ca](http://www.children.gov.on.ca).

## PART 1H: FINANCIAL CONSIDERATIONS FOR COORDINATED SERVICE PLANNING

In order to support local coordinated service planning, proposal development tables are expected to consider aligning existing resources and funding for children’s special needs service coordination, service planning, access mechanisms, case management and other similar functions that support families to access and coordinate services. Any proposed realignment of resources and/or funding must be clearly described in the proposal, along with details of approximately how many children can be served through the realignment, in Section 2, Part 2F of the template.

Depending on local service needs, child population and existing resources, Coordinating Agencies may be eligible for additional funding to support new capacity building through the hiring of Service Planning Coordinators. See Section 2, Part 2F: Resource Allocation for the information required by the ministries in order to approve additional funding for the proposal development table.

## PART 1I: SELECTION OF COORDINATING AGENCIES

Coordinating Agencies will carry out the function of coordinated service planning and maintain accountability for coordinated service planning for children and youth with multiple and/or complex special needs and their families in their service delivery areas. In this capacity, the identified Coordinating Agency in each service delivery area will be responsible for overseeing coordinated service planning in the area, collaborating with relevant local providers in the children's services, health and education sectors, and leading the management and administrative activities associated with coordinated service planning on behalf of the service delivery area.

Proposal development tables must recommend, for the ministries' approval, one existing transfer-payment agency that will be responsible for coordinated service planning in their service delivery area. If the proposal development table cannot reach consensus, a Coordinating Agency will be selected by the ministries through a separate selection process (e.g. application process or appointment).

In recommending/seeking approval for the selection of an agency to be responsible for coordinated service planning, the following expectations must be met:

- The Coordinating Agency must be a transfer payment agency with a funding relationship with the Government of Ontario;<sup>1</sup>
- The proposal must demonstrate that the Coordinating Agency is able to realize the vision and minimum expectations outlined in the document *Coordinated Service Planning: Guidelines for Children's Community Agencies, Health Service Providers and District School Boards*;
- The Coordinating Agency must have experience in service planning and/or delivering services to children and youth with multiple and/or complex special needs;
- The Coordinating Agency must have a governance mechanism in place, including a Board of Directors and an Executive Director or equivalent role;
- The Coordinating Agency must be a Health Information Custodian (HIC);
- The Coordinating Agency must demonstrate family-centred service delivery;
- The Coordinating Agency must have the capacity for recruitment, hiring, training and supervision of Service Planning Coordinators;
- The Coordinating Agency must demonstrate the ability to collaborate and maintain partnerships across the children's service, health, and education

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<sup>1</sup> This includes Community Care Access Centres that have funding relationships with Local Health Integration Networks.

sectors, as well as across the adult services sector for youth transitioning to adulthood and family/parental supports; and

- The Coordinating Agency must demonstrate the ability to take a leadership role in the management of any conflicts with service partners across sectors.

An agency that sits at the proposal development table may be proposed as the Coordinating Agency. Ministries will also consider proposals where an agency has the experience and capacity to be the Coordinating Agency for two or more service delivery areas, and is recommended by proposal development tables in each of the service delivery areas.

As part of the proposal submission, the Coordinating Agency must sign a confirmation allowing the ministries to verify information related to the proposal (see Section 2, Part 2H: Confirmation of the Coordinating Agency).

## PART 1J: PROPOSAL INSTRUCTIONS

Agencies in each service delivery area are asked to develop and submit **one** proposal for coordinated service planning for children and youth with multiple and/or complex special needs to the ministries.

Agencies are encouraged to use internal expertise in the preparation and completion of the proposal. Please note that government funds may not be used to procure third-party expertise in the writing of the proposal.

Please submit all sections listed in the checklist on the next page. Please do not change any of the questions or modify the format of this document.

Many sections of the template requiring answers in the narrative style have mandatory limits for the maximum number of words to be used. Proposals which exceed the word limits may be returned for revisions.

Proposal development tables can attach a list of additional documentation available to support their submission and the ministries will request these documents as necessary.

The proposal will be signed by authorized signing officers from the proposed Coordinating Agency who have the authority to bind the corporation, as well as all members of the proposal development table.

Note that, after a community has submitted a complete proposal which meets all requirements outlined, the ministries may continue discussions, verify information, request revisions to the proposal, or in some circumstances, not accept the proposal. As indicated in Section 1, Part 1F: Proposal Development Timelines the ministries also may engage in a separate process for implementing coordinated service planning in a given service delivery area. The ministries remain committed to working with local providers in the children's services, health and education sectors to ensure that the vision laid out in the Special Needs Strategy is achieved in a way that supports local demographics, needs and strengths. See Section 2, Part 2H: Confirmation of the Coordinating Agency for more information.

## PART 1K: CHECKLIST AND PROPOSAL COVER SHEET

Please use this checklist to ensure that all the information requested has been provided.

Item	Details	Check
Part 2A	Proposal Development Table Profile	
Part 2B	Proposed Approach to Implementing Vision	
Part 2C	Achieving Objectives	
Part 2D	Special Populations	
Part 2E	Proposed Implementation Plan	
Part 2F	Resource Allocation	
Part 2G	Parent and Youth Engagement Summary	
Part 2H	Confirmation of the Coordinating Agency (with signatures)	
Part 2I	Proposal Development Team Confirmation (with signatures)	

# **SECTION TWO: PROPOSAL DEVELOPMENT TEMPLATE**



## PART 2B: PROPOSED APPROACH TO IMPLEMENTING VISION

This section provides an overview of your service delivery area's approach to implementing the vision for coordinated service planning.

1. Please describe the proposed service delivery model for coordinated service planning. (500 word limit)

2. Please describe how the proposed service delivery model for coordinated service planning will be family-centred in its approach. (250 word limit)

3. Please describe how the proposed service delivery model for coordinated service planning will be made readily available to all families of children and youth with multiple and/or complex special needs. (250 word limit)

4. Please describe how information will be shared and multiple programs/sectors will collaborate in order to achieve a single coordinated service plan for families of children and youth with multiple and/or complex special needs. (250 word limit)

5. Please describe how the proposed service delivery model for coordinated service planning will connect families with the range of services and supports that will meet their needs. (250 word limit)

6. Please describe how the proposed service delivery model for coordinated service planning will be focused on optimizing outcomes for children and youth with multiple and/or complex special needs. (250 word limit)

7. Describe how coordinated service planning will improve upon the service experiences of families in your service delivery area, both in general and with respect to the following reported challenges at a minimum: (500 word limit)

- Repeating intake information for every new service or agency introduced to the service plan;
- Repeating needs assessments for every new service or agency introduced to the service plan;
- Identifying new goals for every new service or agency introduced to the service plan; and
- Duplication of services for children receiving services from more than one agency.

The following section provides information regarding the recommended Coordinating Agency and its participating partner service providers across the service delivery area.

## Profile of Coordinating Agency

- Complete legal name of the recommended Coordinating Agency

- Mailing address of the recommended Coordinating Agency

- Name, title, contact information, phone number, and e-mail address of primary contact

NAME	CONTACT INFORMATION
Name:	Position/Title:
	Phone Number:
	E-mail:

## Profile of Service Coordination Partner Providers/Agencies

Note: Partner providers/agencies are all agencies/organizations who will be involved in contributing to coordinated service planning through terms set out in their respective agreements and/or memoranda of understanding with the Coordinating Agency.

- Add rows as needed

Provider Name	Name of Lead Contact	Email address	Sector/Service Type (e.g. hospital, school, etc.)	Proposal development table Member? (Y/N)	Agreement Signed with Coordinating Agency? (Y/N)

## Proposed Approach for Coordinated Service Planning

### **Governance**

1. Describe the proposed governance model for coordinated service planning across the service delivery area, including the roles/responsibilities of all coordination partner providers/agencies. (500 word limit; A visual illustration will be requested in Part 2C: Achieving Objectives, Question 3)

2. Describe the proposed process to be followed by the Coordinating Agency for internal review and complaints management.

3. Describe the proposed process to be followed by the Coordinating Agency for managing risks related to coordinated service planning.

### **Change Management**

4. Describe the plan for transitioning as a service delivery area to the new system of coordinated service planning. Include steps that will be taken to involve partner providers and families in the change management process. (400 word limit)

**Financial Management**

- 5. Please provide evidence that the proposed Coordinating Agency in the service delivery area will be able to manage the financial aspects of its role, appending any documentation that supports its financial viability. (400 word limit)

**Information Management**

- 6. Provide a narrative description of the information management strategy for coordinated service planning across the service delivery area. (500 word limit)

- 7. How will the Coordinating Agency and partner providers/agencies share information amongst them relating to coordinated service planning for the purpose of staying updated regarding any changes or potential issues?

**Performance Measurement/Monitoring**

The Ministry of Children and Youth Services will collect information from the Coordinating Agencies regarding performance measurement and family satisfaction. Please see Appendices 3 and 4 for more details regarding the performance measurement expectations of the ministries.

- 8. Describe how the Coordinating Agency and the Service Planning Coordinators will meet the performance measurement expectations mandated by the ministries for both families and partner providers (see Appendices 3 and 4). (400 word limit)

## PART 2C: ACHIEVING OBJECTIVES

As a result of coordinated service planning, a child/youth with multiple and/or complex special needs will have:

1. A clear process for being referred to coordinated service planning.
2. One coordinated service plan that takes into account all of the child/youth's goals, strengths, and needs.
3. A Service Planning Coordinator who will lead the development of a coordinated service plan, working in collaboration with families and service providers across sectors.

The Coordinating Agency will have:

1. A process for seeking family input into coordinated service planning for the child/youth and consent to share information across service providers.
2. Formal agreements and/or memoranda of understanding that list the minimum expectations and accountabilities for sharing information and contributing to coordinated service planning among all providers of services and supports for children and youth with multiple and/or complex special needs in their service delivery area.
3. Centralized, up-to-date information regarding the services that are available in the service delivery area, and waitlists for services, to inform coordinated service planning.

This section requires proposal development tables to explain how the objectives of coordinated service planning, described in the September 2014 document: *Coordinated Service Planning: Guidelines for Children's Community Agencies, Health Service Providers and District School Boards*, will be met in the service delivery area.

Specific supporting documents are required for some of the sub-sections below and should be appended to this template.

### **1. Children and youth with multiple and/or complex special needs will have a clear process for being referred to coordinated service planning.**

- A. Describe the referral process to the Coordinating Agency once a child/youth has been identified with multiple and/or complex needs in the service delivery area. (300 word limit)

B. Upon receiving a referral for a child/youth, how will the Coordinating Agency go about assigning that family a Service Planning Coordinator? (300 word limit)

C. How will the Coordinating Agency ensure that children and youth with multiple and/or complex special needs who were already in the service system prior to the implementation of coordinated service planning will be referred to the Coordinating Agency and offered a Service Planning Coordinator? Include methods for identifying these children and youth, as well as for completing their service plans (with appropriate consents). (500 word limit)

D. Beyond the service system for children and youth with special needs, what supports will Service Planning Coordinators link to that will address the needs of the parents and/or family as a whole? (400 word limit)

E. Describe the waitlist management strategy for coordinated service planning in the event that demand for coordinated service planning exceeds proposed capacity. (300 word limit)

**2. Children and youth with multiple and/or complex special needs will have one coordinated service plan that takes into account all of the child/youth's goals, strengths, and needs.**

- A. How will consensus be achieved among partner providers/agencies and families in the service delivery area regarding the content of the plan? (300 word limit)

- B. What schedule and policies will be followed by Service Planning Coordinators for reviewing and updating the child's coordinated service plan? Please include the process for triggering an update of the plan that includes involvement of partner providers/agencies and families, as well as timeframes. (500 word limit)

- C. How will the Service Planning Coordinator work with schools and partner providers to integrate transition planning for youth with multiple and/or complex special needs transitioning to adulthood? (500 word limit)

- D. What types of information will the Service Planning Coordinators be required to report to the Coordinating Agency, and how often? (300 word limit)

**Required Attachment:**

- Please attach a sample template for what a written coordinated service plan for a child/youth with multiple and/or complex special needs will look like in your service delivery area.

**3. Children and youth with multiple and/or complex special needs will have a Service Planning Coordinator who will lead the development of a coordinated service plan, working in collaboration with families and service providers across sectors.**

- A. Upon receiving a referral, how will the Service Planning Coordinator determine and convene a planning team (e.g., service providers currently involved with the child’s care and support, a parent or guardian, school personnel, regulated health professionals, and/or primary care) for a child/youth identified as having multiple and/or complex needs? (400 word limit)

- B. How will information regarding the coordinated service plan be shared among partner providers/agencies, Service Planning Coordinators, and families? (200 word limit)

- C. How will Service Planning Coordinators obtain consent from families for the sharing of information with partner providers/agencies? (200 word limit)

- D. How will Service Planning Coordinators ensure that providers outside of children’s specialized services, including District School Board personnel, and primary care professionals, can contribute to coordinated service planning and be included in the planning process? (500 word limit)

- E. What training, capacity building, and information-sharing strategies will be in place to ensure that Service Planning Coordinators are knowledgeable of all relevant services in their service delivery area, including non-clinical services such as support groups and recreational camps? (500 word limit)

Required Attachment:

- Sample service pathway diagram showing how services will be coordinated by the Service Planning Coordinator, including how and when partners will be involved, key decision points through the planning process, and how and when a child’s plan will be submitted for service/case resolution.

**4. Coordinating Agencies will have a process for seeking family input into coordinated service planning for the child/youth and consent to share information across providers.**

- A. How will families be engaged in the development and maintenance of the coordinated service plan including in goal-setting and decision-making related to services? (300 word limit)

**5. Coordinating Agencies will implement and maintain clear processes and protocols for collaboration and information sharing among relevant service providers in their service delivery areas (e.g. through the creation of formal agreements and/or memoranda of understanding that list the minimum expectations and accountabilities for sharing information and contributing to coordinated service planning among all providers of services and supports for children and youth with multiple and/or complex special needs).**

- A. Please describe how the Coordinating Agency will implement and maintain processes and protocols for collaboration and information sharing with service providers (e.g. through the creation of agreements and/or memoranda of understanding between the Coordinating Agency and children’s providers, District School Boards, and/or primary care professionals that identify their roles in the development, maintenance, and review of children/youth’s coordinated service plans)? (400 word limit)

- B. Please describe how the Coordinating Agency will implement and maintain processes and protocols for conflict resolution (e.g. through the creation of agreements and/or memoranda of understanding). (400 word limit)

**Required Attachments:**

- All agreements and memoranda of understanding, existing and proposed, between the Coordinating Agency and partner agencies, to support coordinated service planning across the service delivery area. These must include, at a minimum,
  - Applied Behaviour Analysis-based services and supports lead agencies;
  - Children’s Treatment Centres;
  - Children’s agencies that provide inter-agency service coordination;
  - Local Health Integration Networks;
  - Autism Intervention Program providers;
  - Community Care Access Centres; and
  - District School Boards/School Authorities.

**6. Coordinating Agencies will have centralized, up-to-date information regarding the services that are available in the community, and waitlists for services, to inform coordinated service planning.**

- A. How will the Coordinating Agency maintain a centralized repository of information regarding local services and wait times for those services? (300 word limit)

- B. Which organizations in your service delivery area will provide the Coordinating Agency with information regarding available services? Which organizations in your service delivery area will provide the Coordinating Agency with information regarding waitlists for services? How will this information be shared with families? (300 word limit)

## **PART 2D: SPECIAL POPULATIONS**

This section provides information on how the proposed approach to the delivery of coordinated service planning reflects and supports the needs of children and youth with multiple and/or complex special needs and their families, including those from diverse populations.

**1. How does the proposal address the needs of the various cultural, socio-economic and linguistic populations of children and youth and their families within your service delivery area? (300 word limit)**

**2. How does the proposal address the needs of children and youth and their families in all geographic regions within your service delivery area? (150 word limit)**

**3. Describe how Aboriginal service provider agencies were engaged in the development of this proposal. (300 word limit)**

**4. What is your strategy for addressing the unique needs of Aboriginal children and youth and their families within your service delivery area? (300 word limit)**

**5. What is your strategy for meeting the unique needs of children and youth with medically complex special needs and their families under the proposed model, including coordination with primary care and acute care service providers? (400 word limit)**

**6. French Language Services**

A. Does the *French Language Services Act* (FLSA) apply to the Coordinating Agency?

YES

NO

B. If the *French Language Services Act* (FLSA) applies to the Coordinating Agency, indicate how it will meet the requirements of the FLSA when delivering coordinated service planning. (500 word limit)

C. Regardless of whether the FLSA applies to the Coordinating Agency in your service delivery area, please describe how services will be delivered to Francophone children, youth and their families under the proposed service delivery model. (500 word limit)



**MINISTRIES' CHECKPOINT #5 (October 15, 2015)**


**MINISTRIES' CHECKPOINT #6 (January 15, 2016)**


## PART 2F: RESOURCE ALLOCATION

This section provides information on the availability of all **existing** service coordination, service planning, case management, access mechanisms, and other relevant supports to families currently available to children and youth with multiple and/or complex special needs across the service delivery area. Services to be identified in this section include all annualized provincially-funded services for the functions mentioned above, as well as any other funding sources for these functions. Number of FTEs for each function must also be identified. Please use the table below and add as many rows as necessary.

EXISTING SERVICES/PROGRAMS FUNDED BY FEDERAL, PROVINCIAL, AND MUNICIPAL GOVERNMENTS									
FUNDING ARRANGEMENT		CURRENT FUNCTIONS PROVIDED (CHECK ALL THAT APPLY)					DESCRIPTION OF SERVICE/ PROGRAM	NUMBER OF FTES (PLEASE BREAK DOWN IF MULTIPLE FUNCTIONS APPLY)	ADDITIONAL RESOURCES
FUNDING SOURCE (i.e. Ministry, Area)	NAME OF RECIPIENT ORGANIZATION	SERVICE COORDINATION	SERVICE PLANNING	ACCESS MECHANISM	CASE MANAGEMENT	OTHER RELEVANT SUPPORTS			
<i>e.g. MCYS</i>	<i>Contact Brant</i>			X			<i>Local access mechanism for children and youth ages 0 - 18 with mental health concerns or intellectual disabilities.</i>	<i>9 FTEs: 1 CEO, 6 information services coordinators, 1 assistant resource coordinator, 1 administrative assistant</i>	<i>N/A</i>

## PROPOSED REALIGNMENT OF RESOURCES

1. Please describe, in detail, how existing resources and funding for children's special needs service coordination, service planning, access mechanisms, case management and other relevant supports to families may be realigned to better support coordinated service planning. Please also include details of approximately how many children can be served through the realignment. (500 word limit plus any supporting charts/tables)

## ANTICIPATED DEMAND

1. Provide an estimate of the number of children and youth in your service delivery area who may require coordinated service planning in the 2015-16 fiscal year and explain how the estimate was arrived at. (150 word limit)

## REQUEST FOR ADDITIONAL RESOURCES (OPTIONAL)

1. Do you anticipate that the local demand for Service Planning Coordinators will exceed existing capacity in 2015-16?  
YES   
NO
2. If yes, please describe how many additional Service Planning Coordinators would meet the expected demand, how many children and youth will be served per additional Service Planning Coordinator, and how the new FTEs would be aligned with existing capacity. (400 word limit)

3. Please provide a business case outlining the rationale for the necessary additional resources, including information regarding the expected cost per child served, estimated demand for services, etc. (400 word limit)

**PART 2G: PARENT AND YOUTH ENGAGEMENT SUMMARY**

In order to develop a proposal that addresses the needs of families in the service delivery area, it is expected that proposal development tables will actively seek the input of youth with multiple and/or complex special needs and parents of children and youth with multiple and/or complex special needs. Please list all meetings and activities used to engage and involve parents and youth during the development of this proposal in the table below.

PARENT AND YOUTH ENGAGEMENT			
TYPE OF ACTIVITY	DATE, TIME, AND LOCATION OF ACTIVITY	PURPOSE OF ACTIVITY	NUMBER OF PARENT AND YOUTH ATTENDEES
<i>e.g. Initial parental consultation meeting</i>	<i>Wednesday, October 22</i>	<i>To discuss the ideal vision for coordinated service planning in the community and identify the unique challenges and gaps in the service delivery area.</i>	<i>17 parents</i>

## PART 2H: CONFIRMATION OF THE COORDINATING AGENCY

Name of the recommended Coordinating Agency: \_\_\_\_\_

On behalf of, and with the authority of the corporation, we:

- 1 Confirm that the information supplied in this proposal is correct and complete;
- 2 Consent to the disclosure, on a confidential basis, of the information contained in this proposal by the ministries to those individuals or organizations that the ministries determine are necessary for the purposes of reviewing the proposal;
- 3 Consent to the ministries verifying the information that we provided in this proposal, at the ministries' discretion, by contacting our corporation directly and/or by contacting any other individuals or organizations that may have the necessary information, and/or through on-site verification;
- 4 Will take such steps as may be needed to authorize such third parties to disclose to the ministries information as may be required for the purposes set out above.

\_\_\_\_\_  
Signature

(I have the authority to bind the corporation)

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

## PART 2I: PROPOSAL DEVELOPMENT TABLE CONFIRMATION

To be completed by each mandatory member of the proposal development table, at minimum.

I hereby confirm that the content of this proposal has been read and agreed upon by myself as a member of the proposal development table.

On behalf of, and with the authority of the corporation, I:

- 1 Confirm that the information supplied in this proposal is correct and complete;
- 2 Consent to the disclosure, on a confidential basis, of the information contained in this proposal by the ministries to those individuals or organizations that the ministries determine are necessary for the purposes of reviewing the proposal;
- 3 Consent to the ministries verifying the information that we provided in this proposal, at the ministries' discretion, by contacting our corporation directly and/or by contacting any other individuals or organizations that may have the necessary information, and/or through on-site verification; and
- 4 Will take such steps as may be needed to authorize such third parties to disclose to the ministries information as may be required for the purposes set out above.

\_\_\_\_\_  
Signature  
(I have the authority to bind the corporation)

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Affiliated Agency/Organization

\_\_\_\_\_  
Date

# SECTION THREE: APPENDICES



<b>Special Needs Strategy</b>			
<b>Coordinated Service Planning</b>			
<b>One-Time Grant Request to Support Proposal Development</b>			
<b>April 1, 2014 - March 31, 2015</b>			
<b>Requesting Agency</b>			
<b>Date of Request</b>			
<b>One Time Grant - Details</b>			
<b>One-Time Expenses</b>	<b>FTE</b>	<b>Proposed Budget \$</b>	<b>Purpose</b>
<b>1a. Salaries &amp; Wages, and Benefits Unionized</b>			
(specify)			
(specify)			
<b>1b. Salaries &amp; Wages, and Benefits Non unionized</b>			
(specify)			
(specify)			
<b>2. Contract Services</b>			
(specify)			
(specify)			
<b>3. Operating Costs</b>			
(specify)			
(specify)			
(specify)			
<b>Total One-Time Expenses</b>	-	-	
Additional Description of Purpose of Funding			
<p><b>Submit requests electronically in an excel file (available at  <a href="http://specialneedsstrategy.children.gov.on.ca">http://specialneedsstrategy.children.gov.on.ca</a>) by November 19, 2014 to:                  JosefNicholas.Betita@ontario.ca</b></p>			

## APPENDIX 2: SPECIAL NEEDS STRATEGY WEB PORTAL

You can access the Special Needs Strategy web portal at:  
<http://specialneedsstrategy.children.gov.on.ca>

### How do I register to use the site?

- The first time you go to the site you will be asked to register. Complete the form on this page and click on [Submit] at the bottom of the page.
- You will receive a username and password with additional login instructions once your registration request has been processed.

**LOGIN or register by completing the form below.**

\*(denotes required field)

Name: \*

E-Mail Address: \*

E-Mail Address again: \*

Please enter your E-mail Address a second time.

Region \*

Service Sector (e.g. school, mental health, child care, recreation, etc)

Service role (e.g. frontline, administrator, planner, researcher, manager, etc)



CAPTCHA Code: \*

### How do I login to the site?

- You will receive a username, password and login address once your registration request has been processed.
- Enter your username and password at the login screen to access the site.

### How do I change my password?

- At the bottom of the menu click, 'Administration'. From this page you can link to your user profile where you can change or add information about yourself and update your password.

 **Profile**

**Personal Options**

Admin Color Scheme

 Blue

 Gray

Show Admin Bar

when viewing site

in dashboard

**Name**

Username

First Name

Last Name

New Password

*If you would like to change the password type a new one. Otherwise leave this blank.*

*Type your new password again.*

**Strength indicator** *Hint: The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! " ? \$ % ^ & ).*

**Update Profile**

### What if I forget my password?

- If you forget your password, go to the login screen and enter your username. Click [Lost Your Password?] and a new temporary password will be emailed to the account you used to register.

### How do I switch the language of the site?

- You can choose your language from the menu on the left hand side.
- You can also indicate your preferred language in your profile. To go to your profile, click 'Administration' at the bottom of the menu then follow the instructions.

### APPENDIX 3: PERFORMANCE MEASUREMENT (TO BE CONFIRMED)

Coordinating Agencies will be expected to collect the information below on behalf of their service delivery areas. This information will be reported back to the Ministry of Children and Youth Services on a regular basis for performance measurement purposes. Please note that these performance measures are subject to change.

1. Number of children currently served (tentatively defined as the number of families who currently have a Service Planning Coordinator)
2. Complexity of needs of children/families (tentatively defined as the median number of agencies/organization included in coordinated service plans)
3. Method of accessing coordinated service planning (tentatively defined as the proportion of families referred for coordinated service planning by another agency/organization and the proportion of families who self-referred for coordinated service planning)
4. Access to coordinated service planning (tentatively defined as the proportion of families referred or self-referred for coordinated service planning who received service)
5. Number of meetings held with families
6. Hours of face-to face service provided
7. Number of existing coordinated service plans
8. Frequency that coordinated service plans are reviewed and updated
9. Number of families discharged from service
10. Level of family satisfaction (based on the confidential family survey – see Appendix 4)
11. Number of families waiting for service
12. Number of incidents reported to Coordinating Agencies involving families, including serious occurrences and client complaints

## APPENDIX 4: FAMILY SATISFACTION SURVEY (TO BE CONFIRMED)

Service Planning Coordinators will be expected to request that families complete the following confidential surveys at the start of their experience with coordinated service planning and at regular intervals thereafter. The results of these surveys will be compiled and submitted to the ministries for performance measurement purposes.

CONFIDENTIAL FAMILY SURVEY: COORDINATED SERVICE PLANNING							
Family Self-Assessment							
<i>Please rate the statements below using the following scale: 1=strongly agree 2=somewhat agree 3=neutral 4=somewhat disagree 5=strongly disagree</i>							
		1	2	3	4	5	N/A
1	I feel comfortable in my capacity to support my child/youth with multiple/complex special needs						
2	I feel that the services for my child/youth are centred around the strengths and needs of my entire family						
3	I feel informed regarding the services needed for my child/youth with multiple/complex special needs						
4	I feel involved in decision-making for my child/youth						
5	I am aware of the appropriate services and supports available for my child/youth in the community						
6	I am aware of the appropriate services and supports available for parents and families in the community						
7	I have access to the resources I need to support my child/youth with multiple and/or complex special needs						
8	I know who to call if I have a question regarding services for my child/youth						
9	I feel that service providers are sharing information regarding my child/youth so I do not have to repeat my story						
10	I feel that service providers are sharing information regarding my child/youth so that services are not duplicated						
11	I feel satisfied with how services are being coordinated for my child/youth						
12	I am aware of waitlist information for the services I am seeking						
COMMENTS:							

## APPENDIX 5: SERVICE PLANNING COORDINATORS: DESCRIPTION OF ROLE

Service Planning Coordinators will support families of children and youth with multiple and/or complex special needs by acting as one identifiable point of contact for the development of a coordinated service plan that recognizes all of their service needs and builds on their child/youth's strengths. Service Planning Coordinators will help families connect with the right services in their service delivery area and monitor how children and youth are progressing through the service plan as they grow.

While the focus of the Service Planning Coordinator will be on developing a family-centred coordinated service plan for the services required for the child/youth, he/she will also be expected to make appropriate linkages to services and supports for the parents and/or family as a whole in order to enable them to better support the needs of the child/youth.

The development of the coordinated service plan will involve:

- Collecting information related to the service needs, strengths and priorities of families and their children and youth with multiple and/or complex special needs.
- Identifying key goals for the child and family.
- Initiating and developing a coordinated service plan collaboratively with the family and all relevant service providers including District School Boards.
- Providing families with information regarding available services in the service delivery area, including services delivered in schools, as well as in Section 23 Programs in Care, Treatment, Custody and Corrections and Section 68 School Authorities.
- Helping families access the services that they need including (but not limited to):
  - Developmental and diagnostic assessments;
  - Rehabilitation services;
  - Respite funding and services;
  - Recreational programs and camps;
  - Parent groups, supports and information sessions;
  - Primary care services; and
  - Mental health services.
- Monitoring, reviewing, and updating the coordinated service plan at regular intervals (a minimum of 6 months) or as needed (e.g. when goals are met, priorities change), in collaboration with family and relevant providers in the children's services, education, and health sectors, as the child/youth develops.
- Collaborating with local case/service resolution mechanisms when child and family needs are sufficiently complex to exceed the ability of local services to meet.

- Initiating contacts for an integrated transition planning process<sup>2</sup> in collaboration with the young person and their parent/guardian, the school, community agencies, and health care providers when a young person is preparing to transition to adulthood (planning should begin at age 14) for young people with multiple and/or complex special needs.<sup>3</sup>

Service Planning Coordinators should support the family through their service experience until the child transitions to adult services. They will link families with the right information and help them understand and manage their short and long-term service goals. They will also maintain partnerships with children's service providers, District School Boards, health care, recreation services and other service providers.

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<sup>2</sup> Similar to process outlined in the *MCSS/MCYS Provincial Transition Planning Framework for Young People with Disabilities* and Tri-Ministry Addendum (memo), resulting in a single, integrated transition plan for children and youth with multiple and/or complex special needs and their families.

<sup>3</sup> *Policy/Program 156: Supporting Transitions for Students with Special Education Needs* states that all transition plans must be developed in consultation with the parent(s), the student (as appropriate), the postsecondary institution (where appropriate), and relevant community agencies and/or partners, as necessary.