



THE UNIVERSITY OF BRITISH COLUMBIA

Canadian Institute for Inclusion and Citizenship

Scoping review (2024)
Updated search (2026)

Individualized Funding and Self-Direction:

Major thematic developments and discussions in the
international academic literature



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The researchers involved with this project acknowledge that the Canadian Institute for Inclusion and Citizenship is located across UBC's campuses and learning sites that are situated within the traditional territories of the **xwməθkwəy̓əm** (Musqueam), **Skwxwú7mesh** (Squamish), and **Səlílwətaʔ/Selilwitulh** (Tsleil-Waututh) peoples, commonly referred to as Vancouver and in the traditional, ancestral, unceded territory of the **Syilx** (Okanagan) peoples, commonly referred to as Kelowna in British Columbia, Canada.



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Scoping review (2024)

The scoping review functions as a robust document regarding policy, best practices, and lived/living experiences to provide insights into the facilitators and barriers to individualized funding models; that considers future implications for individualized funding and self-direction

Community Living BC (CLBC) is a provincial Crown corporation that funds supports for people 19 years or older who have a developmental disability.



CLBC also funds supports for adults with a diagnosis of Autism Spectrum Disorder (ASD) or Fetal Alcohol Spectrum Disorder (FASD) and who need significant help with day-to-day tasks.

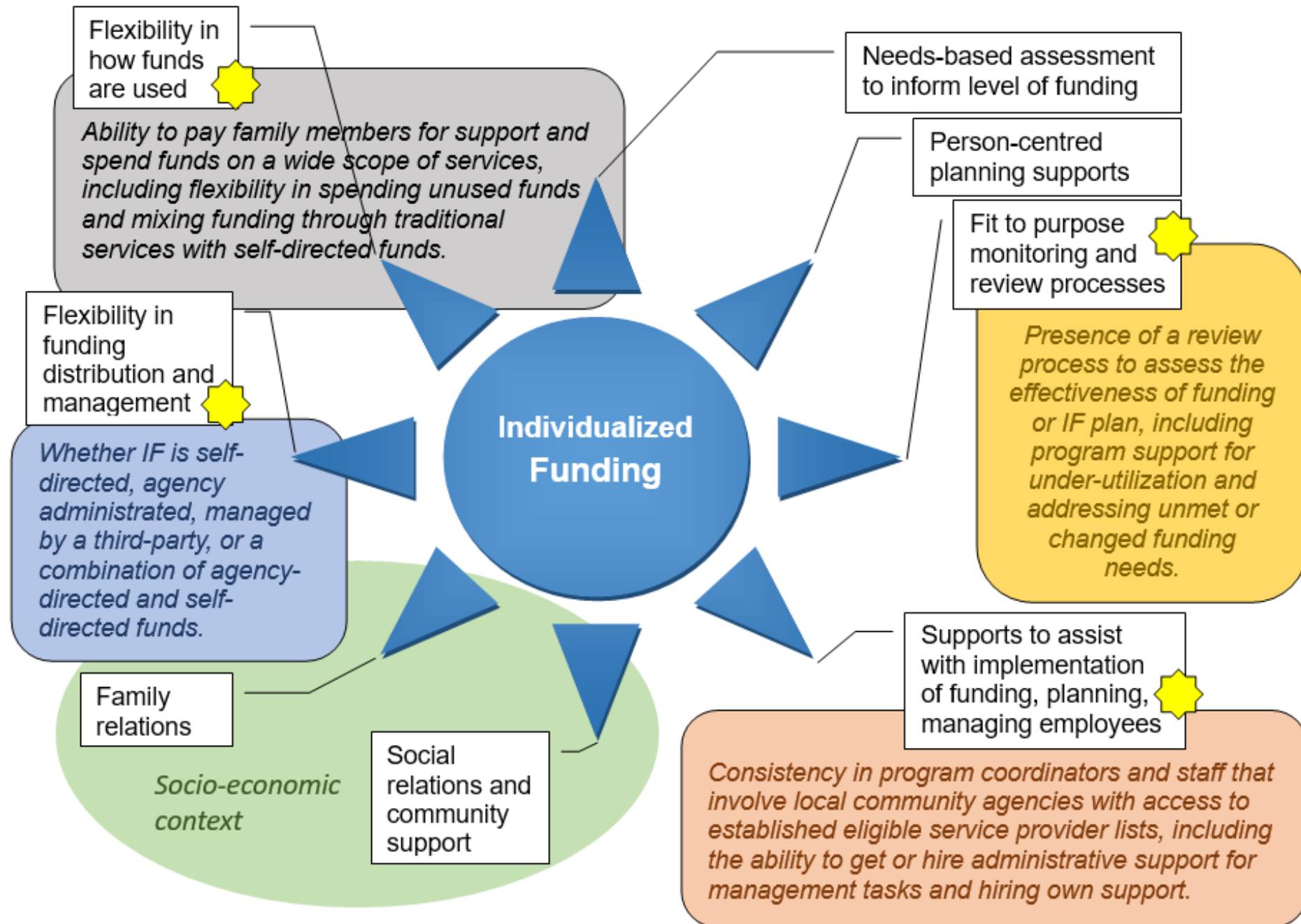
An international scoping review was completed in 2023-2024, which followed the PRISMA Scoping Review (PRISMA-ScR) and PRISMA for Searching (PRISMA-S) extensions.

This scoping review included 347 peer-reviewed articles published between 2011 and October 2023 *

* <https://ciic.ok.ubc.ca/research/policy-practice-and-ethics/individualized-funding/>



Central components to Individualized and Self-Directed Support funding models



Scoping review (2024)

An international scoping review was completed in 2023-2024, which followed the PRISMA Scoping Review (PRISMA-ScR) and PRISMA for Searching (PRISMA-S) extensions

Research questions:

How is recent international literature discussing individualized funding and self-directed supports?

What are the major thematic areas and how might these inform IF policy and practice?

Inclusion criteria:

Individualized/Self-directed funding models

Intellectual, learning, developmental and/or psychosocial disabilities

Published between 2011 and 2023

Peer-reviewed primary and secondary articles, including other reviews

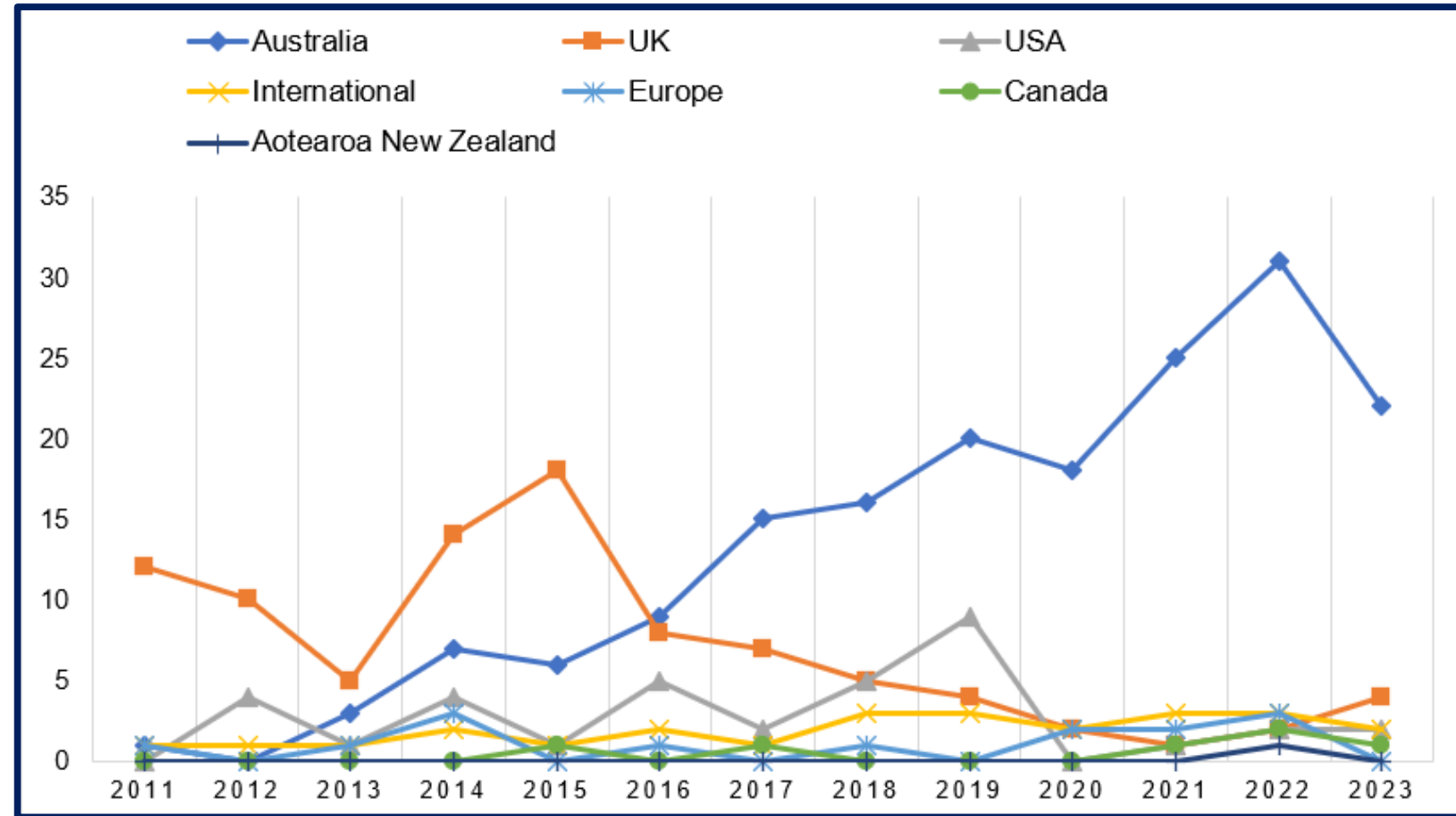
English

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Publication Year	N	%
2011	15	4.3
2012	15	4.3
2013	11	3.2
2014	30	8.6
2015	27	7.8
2016	25	7.2
2017	26	7.5
2018	30	8.6
2019	36	10.4
2020	24	6.9
2021	33	9.5
2022	44	12.7
2023	31	8.9
Study Design	N	%
Qualitative	258	74.4
Mixed Methods	31	8.9
Quantitative	29	8.4
Knowledge Synthesis	29	8.4
Jurisdiction	N	%
Australia	173	49.9
UK ¹	92	26.5
USA	36	10.4
International	25	7.2
Europe	14	4.0
Canada	6	1.7
New Zealand	1	.3



¹ Referring to England, Scotland, Wales, and Northern Ireland

“Individualized Funding” (IF)...

... is funding given to an individual, or their representative, to support **disability-related needs**.

- the **amount** of funding is determined by the individual’s specific disability related needs and wants.
- the individual determines how funds are used to meet those needs.

Stainton, 2009



We conducted a **scoping review** of 347 articles on IF, from international literature.
In our review, we found...

Benefits

Person-centred
and fosters
self-determination



**Control, choice,
reliability, flexibility**

Facilitators

Clear lines of
communication



**Family status,
social capital,
capacity, and
geographic location**

Interagency
collaboration



**Trusted service
providers**

Barriers



Administrative
burden



Lack of **access**
to information



Existing **inequities**



Rural and remote
constraints



Availability of
professional
and skilled staff

Siloed systems

(e.g., health care, social care)



Age-based **transition periods**
(e.g., child to youth, youth to
adult, and adult to senior services)



What does this all mean?

- IF can be used in a **broad range of ways** to support the individual and their support networks
- To work well, IF requires support for: **planning**; recruitment and hiring of **professionals and support workers**; funding and employee **administration**
- IF will not replace all agency services
- IF presents unique challenges & opportunities for **rural and remote communities**
- IF presents unique challenges & opportunities for **Indigenous and other cultural communities**
- When done well, IF is **cost effective** and can support **positive outcomes** for individuals and their support networks

Updated Search (2026)

An updated search was completed in May of 2026, which similar to the 2024 review, followed the PRISMA Scoping Review (PRISMA-ScR) and PRISMA for Searching (PRISMA-S) extensions

Publication Year	N	%
2013	1	.8
2014	1	.8
2023	8	6.4
2024	38	30.4
2025	59	47.2
2026	18	14.4
Jurisdiction	N	%
Australia	108	86.4
Belgium	4	3.2
International	4	3.2
England	4	3.2
Israel	2	1.6
Scotland	1	.8
Canada	1	.8
United States	1	.8

The updated full-text screening process and 125 included articles for extraction shows a highly recent corpus, with 92% published between 2024 and 2026, that is strongly Australia/NDIS-focused, with 111 articles involving Australia directly or in comparison.

This updated review is in the full-text screening phase of Covidence, with **125** results having been published between October 2023 and May 2026 that met the inclusion criteria*

* This updated search also meant the inclusion of two articles previously missed for the 2011 – 2023 period.



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Updated Search (2026)

*This updated review is in the full-text screening phase of Covidence, with **125** results having been published between October 2023 and May 2026 that met the inclusion criteria**

Primary thematic focus	n	%
Policy, governance, market design, and administrative justice	25	20.0%
Choice/control, self-management, personal budgets, and participant outcomes	20	16.0%
Children, families, early childhood, autism, and school transition	16	12.8%
Housing, living arrangements, transitions, and aged care interface	13	10.4%
Psychosocial disability and mental health interface	13	10.4%
Workforce, provider practices, service quality, and safeguarding	13	10.4%
Equity, intersectionality, First Nations, gender, rurality, refugees, and marginalised groups	13	10.4%
Access, eligibility, navigation, support coordination, and administrative burden	12	9.6%

* This updated search also meant the inclusion of two articles previously missed for the 2011 – 2023 period.



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