

Direct Funding Managers Report

Experiences of Families and People Managing Direct Funding
in Ontario's Developmental Services Sector

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A Provincial Survey of Direct Funding Managers in Ontario

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Executive Summary

This report presents findings from a provincial survey of families and individuals who manage direct (individualized) funding for developmental services in Ontario. Drawing on responses from more than 275 participants, the study examines why people manage funding directly, how they recruit and retain support workers, and the administrative demands they carry to secure quality supports for people with developmental disabilities.

Key Findings

Direct funding is primarily used to hire direct support professionals, either as independent contractors or employees: Over 90 percent of respondents receive and manage direct funding themselves, with mothers assuming primary responsibility in nearly 80 percent of cases.

- Choice and control are core motivators: Families manage funding to ensure safety, trust, consistent relationships, and alignment with values of dignity and inclusion.
- For many, direct funding is not a real choice: A substantial number of respondents report managing funding because agency-based services are unavailable, inflexible, unsafe, or unable to meet complex needs.
- Workforce instability is a defining challenge: Over 40 percent of respondents experienced staff turnover in the previous year, and nearly one-third reported active vacancies.
- Administrative burden is substantial and unpaid: Managing direct funding commonly requires 6–10 hours of work per month and demands skills equivalent to running a small business.
- Direct funding improves fit and satisfaction—but not sustainability: While most respondents report high satisfaction with support workers, funding levels and system design undermine long-term workforce stability.

Why Families Manage Direct Funding

Families are motivated by a deep commitment to protecting and enhancing the quality of life for the person they support. Direct funding allows families to choose who provides support in private and community spaces, ensure consistency and trust, and tailor supports to individual needs and aspirations. Many respondents view direct funding as the only viable way to achieve person-centred, inclusive support in a system marked by staff shortages, rigid program models, and limited one-to-one options.

At the same time, the report highlights a critical tension between the language of “choice” and families’ lived experiences. For many, managing direct funding is less an empowered decision than a necessity created by system gaps and long waitlists. Families often assume this role despite significant stress, burnout, and financial risk. Direct funding works, but it relies on unpaid family labour.

The Direct-Funded Workforce

This study provides one of the first detailed portraits of the workforce hired through direct funding. Most support workers are employed part-time or casually, reflecting limited funding amounts and fragmented hours. Families place the highest value on trustworthiness, reliability, empathy, and person-centred values—often prioritizing fit and character over formal credentials. However, recruitment and retention are persistent challenges due to inadequate funding, lack of centralized recruitment supports, limited training opportunities, and system-wide labour shortages.

Administration and Sustainability

Managing direct funding requires extensive expertise in human resources, accounting, employment law, scheduling, and compliance. Families repeatedly describe this workload as overwhelming and unsupported, particularly in contrast to agency models that receive management funding. Paid bookkeeping, payroll services, independent facilitation, and strong peer networks are identified as critical supports—but these are often inconsistently funded or unavailable.

Conclusion

The findings are clear: individualized funding works and delivers high-quality, person-centred outcomes. However, its success currently depends on families absorbing unpaid labour, administrative complexity, and system risk. Without structural supports—such as funded administration, simplified reporting, adequate funding levels, and centralized workforce infrastructure—direct funding remains effective but fragile.

The survey findings further suggest that strengthening individualized funding in Ontario will require shifting from a model that relies on family resilience to one intentionally designed for sustainability, equity, and long-term success.

Introduction

This report presents findings from a survey of families and people who manage direct (individualized) funding for developmental services in Ontario. Direct funding includes a variety of government programs that provide monies directly to families and service users so they can purchase services or hire their own staff. This study sought to understand the experiences of people who manage direct funding budgets, especially their experiences managing the workforce.

The report synthesizes quantitative results and qualitative comments to identify what is working well, what is not working so well, and what changes will help those managing these funds improve the lives and outcomes for people with developmental disabilities and their families.

The report focuses on three key areas concerning experiences managing direct funding in Ontario. First, the surveys collected information to better understand the motivation and purpose for managing direct funding from the perspective of families and people who choose to manage the funds themselves. This study examines why people take on the administrative burden of managing funds. Second, this is the first study to examine the characteristics and profile of the developmental services workforce hired or contracted by those who manage direct funding. Third, this report highlights the administrative challenges facing those who manage direct funding.

Methods

The survey design followed extensive consultations with family networks and direct (individualized) funding advocates. These consultations expanded the scope to include motivations and challenges for managing direct funding in general, with a special focus on workforce issues. This research project, and the associated data collection protocols, were reviewed and approved by the General Research Ethics Board at Queen's University. Survey responses were anonymous.

As this study represents one of the first attempts to survey direct funding managers in Ontario, identifying and engaging the targeted population was an important methodological challenge. The research team included a "Family Engagement Coordinator" who connected with both individuals and family networks to build a database of the targeted population. In addition to building the target population database, the survey distribution strategy engaged a variety of family-based networks and social

connections among people who receive and manage direct funding from the Government of Ontario to purchase developmental services and supports.

Limitations

Participants were primarily connected to family networks, which may over-represent individuals already engaged in advocacy or self-direction. Importantly, we know that families and people with disabilities experience higher rates of social isolation.¹

Limitations in the distribution network may have resulted in response bias by missing this important segment of the population. Other potential sources of bias among participants included the electronic format and English-only language of the survey.

Participants and Program Context

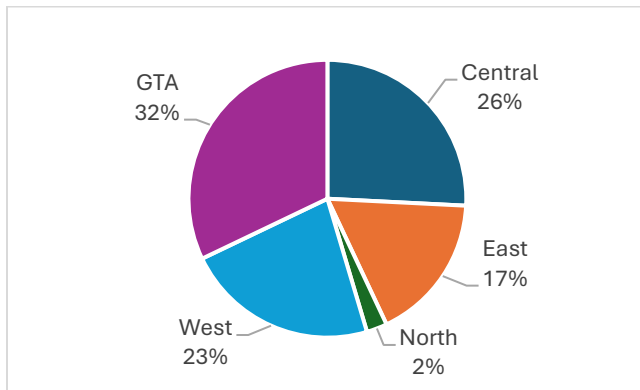
We collected over 275 surveys from people who receive direct funding to manage developmental services and supports. Nearly 91 percent of participants receive direct funding. Among those who do not receive direct funding, most were still working on the application process or waiting for approval. A handful of respondents indicated that they did not have enough information about available programs or were told they were not eligible. Respondents who did not receive and manage direct funding were excluded from the following analyses.

Direct Funding

As shown in figure 1, nearly one-third of survey respondents are in the Greater Toronto Area (GTA). Roughly one-quarter of respondents were from the Central (26 percent) and West (23 percent) regions in Ontario. Fewer respondents participated from the East (17 percent) and North (2 percent) regions.

¹ Currie, G., & Szabo, J. (2020). Social isolation and exclusion: the parents' experience of caring for children with rare neurodevelopmental disorders. *International journal of qualitative studies on health and well-being*, 15(1), 1725362. Amado, A. N., Stancliffe, R. J., McCarron, M., & McCallion, P. (2013). Social inclusion and community participation of individuals with intellectual/developmental disabilities. *Intellectual and developmental disabilities*, 51(5), 360-375.

Figure 1: Geographical distribution of respondents



Budgets and sources of funding

Most respondents (53 percent) manage annual budgets between \$10,000 and \$50,000, as shown in figure 2 below. One quarter of respondents manage less than \$10,000 per year, including ten percent of respondents who manage less than \$5,000 per year. A smaller percentage of respondents (4 percent) manage relatively large annual budgets of \$150,000 or more.

Figure 2: Direct Funding Budgets

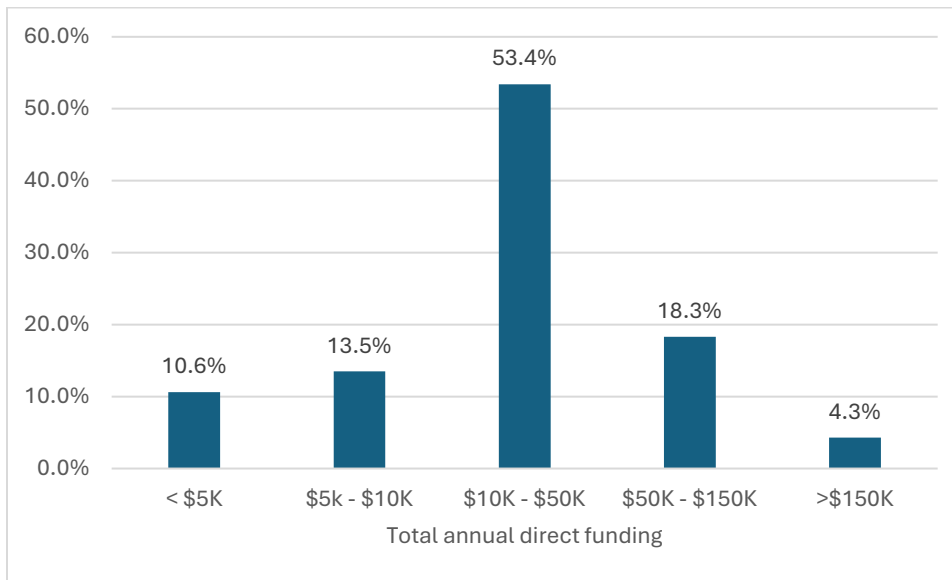
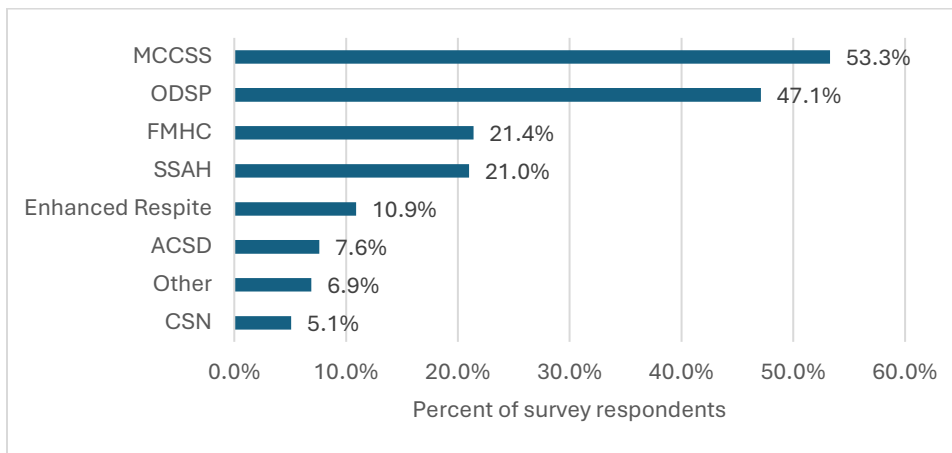


Figure 3 presents the prevalence of the different sources of funding. The Ministry of Children, Community, and Social Services (MCCSS) is the most common source (53 percent), reflecting the primary direct funding program known as Passport². Nearly half of

² For an overview of the Passport program and its guidelines, please see the following link: <https://files.ontario.ca/mccss-passport-guidelines-april-2023-en-2023-03-06.pdf>

direct funding managers (47 percent) include the social assistance program, Ontario Disability Support Program (ODSP), as part of the overall mix of funding supports. Less common (21 percent each) was funding from the Family Managed Homecare³ program (FMHC) and Special Services at Home (SSAH). Less common funding sources include Enhanced Respite (nearly 11 percent), and Assistance for Children with Severe Disabilities (ACSD) program (7.6 percent). Just five percent of survey participants receive Complex Special Needs⁴ (CSN) funding, a program supporting eligible children and their families.

Figure 3: Direct Funding Sources



When examining funding sources by annual budgets, those managing larger budgets (>\$50,000) tend to draw from multiple sources. Most respondents at the top end of the budget scale (>\$150,000) tended to draw from nearly all sources and were the most prevalent group (43 percent) receiving funding from the Complex Special Needs program. Receiving funding from multiple sources increases capacity, but it also increases administrative complexities.

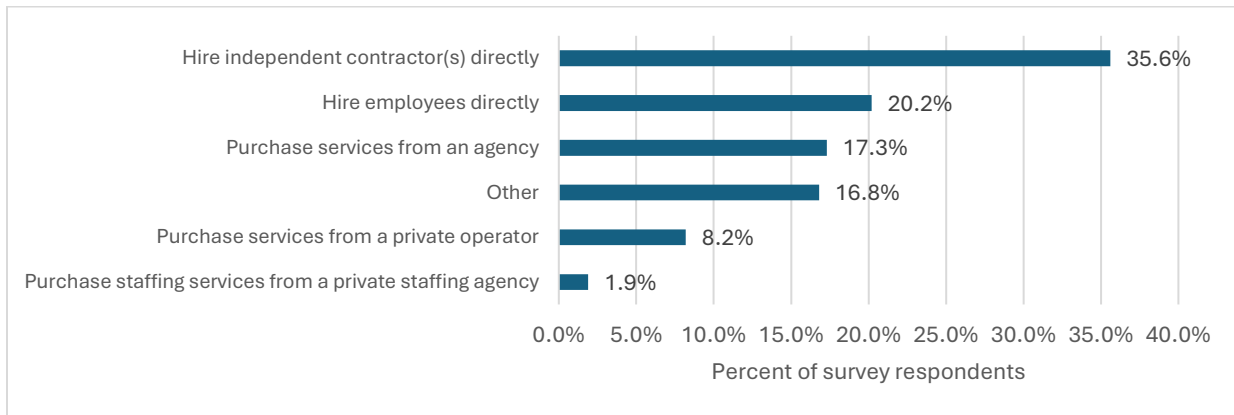
How Recipients Use Direct Funding

Figure 4 presents how managers primarily use their direct funding allocations. Just over half of the survey respondents used their funds to purchase services from independent contractors (35 percent) or hire employees (20 percent).

³ For a description of this program please see <https://ontariohealthathome.ca/home-care/family-managed-home-care/>.

⁴ <https://www.ontario.ca/document/2025-2026-mccss-service-objectives-children-special-needs/2025-2026-services-delivered-40>

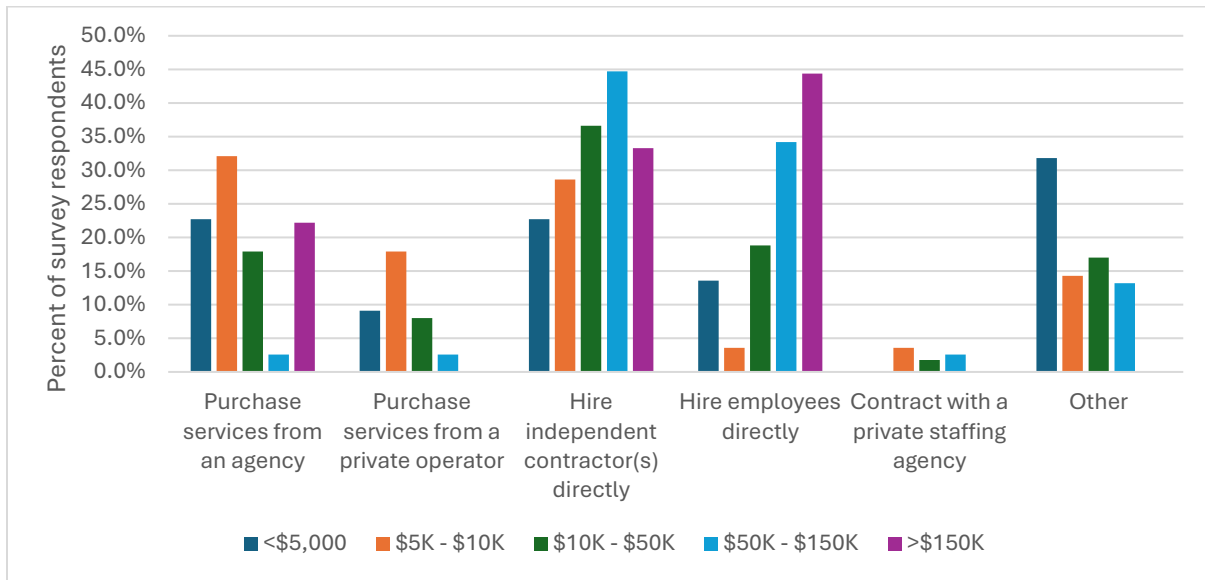
Figure 4: Primary Use of Direct Funding



Among the respondents who indicated ‘other,’ most used the funds for a combination of hiring support workers, purchasing services, and covering expenses. The use of funds often aligned with the distinct program requirements and constraints. For example, one respondent commented that “passport – use for programs, camp, etc. FMHC (Family Managed Homecare) – purchase staffing from a private staffing agency.” Managing across the various funding sources adds the complexity and administrative burden of managing direct funding allocations.

We also found distinct patterns in the primary use of funding based on the size of the annual budget (Figure 5). Those managing smaller annual budgets, less than \$10,000 per year, were more likely to purchase services from an agency or hire an independent contractor. Those managing annual budgets between \$50,000 to \$150,000 were more likely to purchase services from independent contractors. Whereas respondents receiving more than \$150,000 in annual funding were more likely to hire employees than independent contractors.

Figure 5: Primary use of direct funding by funding level



Usage patterns appear to be correlated with funding constraints more than a reflection of choice or preferences.

Motivations and Inspiration for Using Direct (Individualized) Funding

People who manage direct or individualized funding for disability supports describe a combination of strong values, practical needs, and systemic pressures that motivate their choice. Above all, families are driven by the desire to ensure safety, trust, and peace of mind for their loved ones. Being able to choose who supports a family member—particularly within the private space of the home—is critical to feeling secure and confident that care is consistent, respectful, and responsive to individual needs.

The survey data reflected a policy contradiction in the motivations and experiences of direct funding managers. While many respondents reported values-driven motivation, the counter-narrative of necessity-driven management was repeatedly articulated in survey comments.

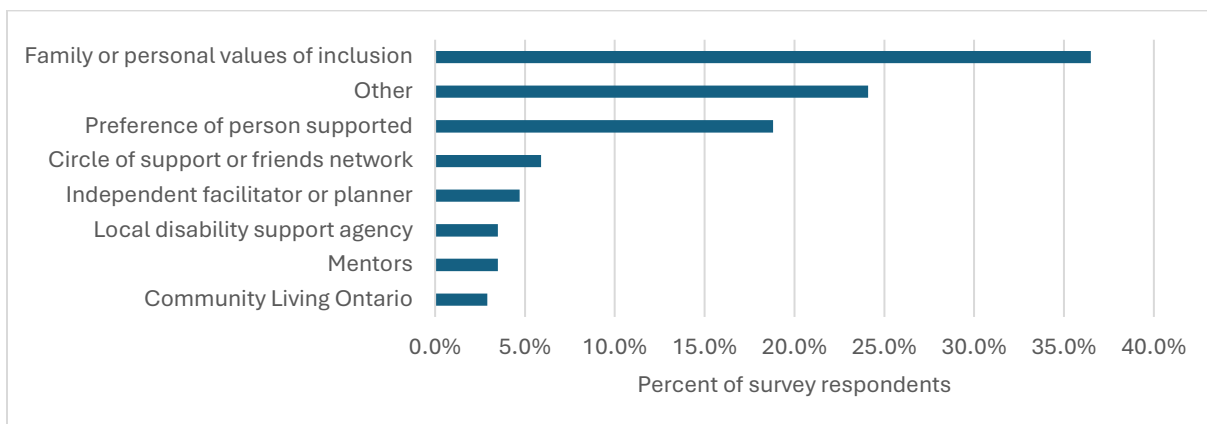
Choice, control, and flexibility are central motivations. Direct funding allows families to decide how resources are used, who is hired, how schedules are arranged, and how supports change over time. This flexibility enables people with disabilities to live lives that reflect their preferences, goals, and aspirations rather than fitting into rigid programs or agency structures. Many families describe direct funding as the only way to achieve truly person-centred support.

A strong source of inspiration is the desire for community inclusion and an ordinary life. Families want their loved ones to be known in their neighbourhoods, participate in meaningful activities, build relationships, and contribute as valued citizens. Direct funding is seen as a pathway to inclusion, allowing people to move beyond segregated or program-based services toward real community connection and belonging.

For many respondents, direct funding is not simply a preference but a necessity. Families report limited or nonexistent agency options, staff shortages, rural isolation, and services that are unable or unwilling to support complex needs. In these circumstances, managing funds directly becomes the only viable way to secure support. Past negative experiences with agencies—including high staff turnover, lack of continuity, and agency priorities overriding individual needs—further reinforce this choice.

At the same time, families acknowledge the significant burden of managing direct funding. Hiring, training, scheduling, payroll, compliance, and reimbursement models place heavy administrative and emotional demands on families, often alongside full-time caregiving and employment. Despite this, families persist because they feel that direct (individualized) funding produces better outcomes: stronger relationships with support workers, improved quality of life, greater independence, and dignity for the person supported. Ultimately, direct funding reflects a values-driven commitment to inclusion, human rights, and ensuring a meaningful life now and into the future, even in the face of systemic barriers.

Figure 6: Most important motivating factor for managing direct funding

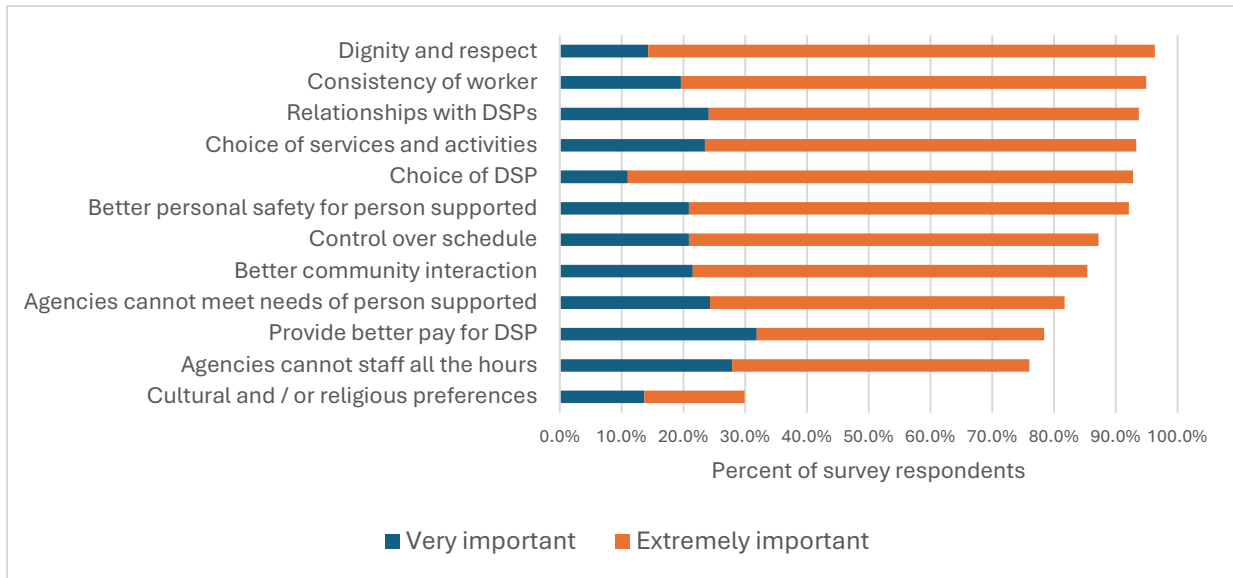


Nearly 25 percent of respondents provided a broad range of ‘other’ reasons for managing direct funding. For some, the motivation to manage direct (individualized) funding and hire their own support workers is primarily because it allows them to meet complex needs that they feel are not adequately addressed through agency-based services. Many families described direct funding as a necessity rather than a choice, driven by limited-service

availability, lack of one-to-one supports, rural isolation, or agencies being unwilling or unable to provide safe and consistent care.

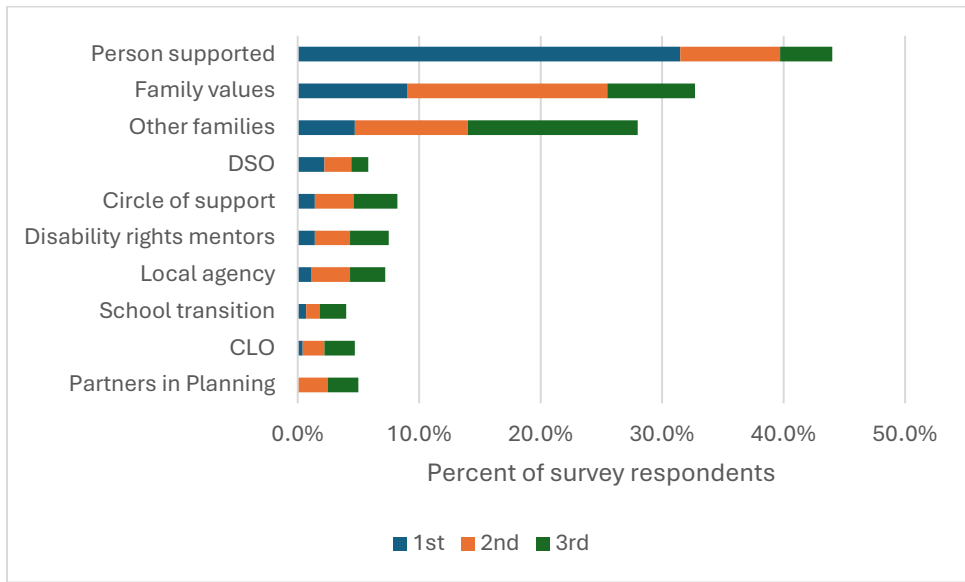
Figure 7 further explores the importance of various factors for managing direct funding. While respondents labelled most of the categories ‘extremely’ or ‘very important,’ it is interesting to note that cultural and / or religious preferences were an outlier from this pattern.

Figure 7: Importance of reasons for directly managing funds



Similarly, when asked to identify the top three sources of inspiration for how to use direct funding, the factors are closely aligned with the person supported and family values. As shown in figure 8 below, the person supported is the primary inspiration for how taking on the administrative burden of managing direct funding can support a rich life. More generally, family values and family connections are much more important sources of inspiration than agencies and other service-based organizations. This may reflect an important tension between how agencies and service providers promote programs and how families and direct funding managers think about supporting a rich life for the person with disabilities.

Figure 8: Top three sources of inspiration to manage direct funding



In the open-ended comments about sources of motivation and inspiration for managing direct funding, respondents asserted that direct management enables families to select, train, and retain support workers who are the right fit for the person supported, ensuring consistency, trust, and responsiveness to highly individualized needs. Families also value the ability to align supports with their beliefs in inclusion, dignity, and person-directed lives, avoiding segregated or program-driven models. Additionally, managing funding directly allows limited resources to go further by avoiding agency fees and ensuring funds are spent directly on support. Overall, families take on this role to protect quality of life, safety, and meaningful community inclusion for the person they support.

A Critical Perspective on Choice

There were several respondents who indicated that managing direct funds was not a choice spurred by motivation, rather “its not like I had a choice or motivation...we applied for funding and received it, and we manage it because there is no other option. There is no motivation factor here, just making sure the funds are spent for her benefit and not mismanaged.” This critical perspective was reflected in other comments such as, “no other choice -- it's required, no one else will manage these funds for my child, I don't want to, but this is how all these programs are setup, by putting this burden on parents.” This apparent contradiction between policy objectives and the lived experience of direct funding managers demands further attention.

This critical sentiment may be more broadly experienced among direct funding recipients as the current survey may reflect a degree of self-selection bias. Those individuals and family networks who have advocated for direct funding were more likely to complete the

survey than those provided with passport funds as the only mechanism for government funded supports and services. Table 1 provides a summary of the themes reflected in the comments about motivation for using and managing direct funding.

Table 1: Other Motivations for Using Direct Funding

Theme	Description
Safety, Trust & Peace of Mind	Ability to choose who provides support, ensure consistency, and feel safe in the home
Choice, Control & Flexibility	Control over spending, staffing, schedules, and adapting supports as needs change
Person-Centred & Individualized Support	Supports tailored to strengths, interests, goals, and life vision
Community Inclusion & Ordinary Life	Participation in neighborhoods, relationships, employment, and valued roles
Necessity Due to Lack of Alternatives	Limited agency options, staff shortages, rural isolation, complex needs
Frustration with Agency-Based Services	High turnover, rigid rules, lack of continuity, agency priorities over individuals
Better Working Conditions for Support Workers	Fair pay, consistent hours, respectful and relationship-based workplaces
Future Planning & Independence	Preparing for aging caregivers, long-term stability, housing, and independence
Family Networks & Peer Inspiration	Learning from other families, facilitators, and inclusive community leaders
Administrative Burden & Systemic Barriers	Heavy paperwork, reimbursement models, insufficient funding, stress on families
Values of Inclusion & Human Rights	Commitment to dignity, belonging, contribution, and everyday ordinary life

The survey found a broad set of motivating factors to manage direct funding among respondents, including choice, control, and flexibility. Within this broader context of motivating factors, the role of who provides supports, the employees or independent contractors is a central consideration.

Whether recipients feel motivated or forced to manage direct funding, the role of direct support professionals is central to the quality of services and outcomes of supports. The motivations described above directly shape how families recruit, retain, and manage support workers, as explored in the following section.

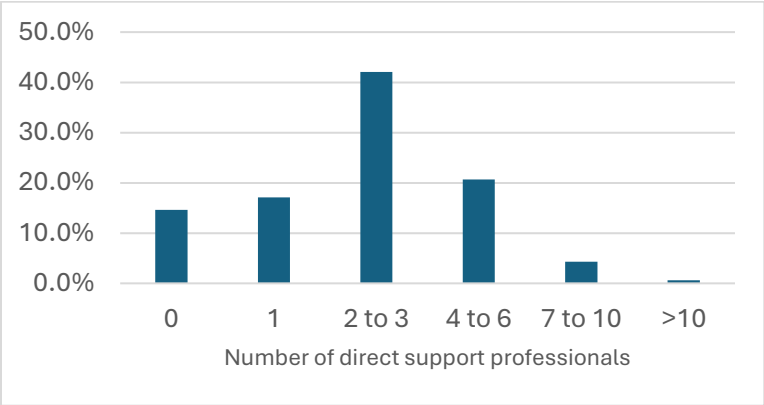
Direct Funding Workforce

A 2025 survey⁵ of the agency-based workforce in Ontario’s developmental services sector found that nearly 22 percent of direct support professionals worked both for an agency and for direct funding managers. Beyond this overlapping population of the workforce, little is known about workers hired directly by families and others managing direct funding packages. This section explores the experiences of direct funding managers and their efforts to recruit and manage direct support professionals. In particular, the survey results provide insights into the characteristics and skills that managers look for in the direct funding workforce.

Workforce Numbers

Figure 9 presents the number of direct support workers managed by respondent. Most managers (41percent) manage 2 to 3 direct support professionals.

Figure 9: Total number of support workers hired with direct funding



Most staff were part-time (54 percent) or casual (31percent) as shown in Table 2. Nearly 15 percent of directly hired staff worked full-time. Survey participants hired nearly 450 independent contractors or employees with the financial support of direct funding programs.

Table 2: Employment status of directly hired staff

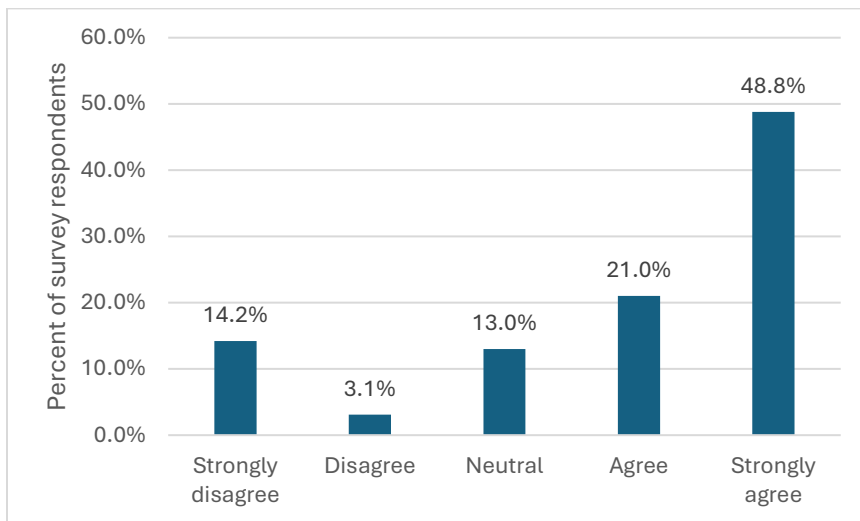
	Minimum	Maximum	Average	Total
Full-time	0	5	1.12	66
Part-time	0	7	2.19	243
Casual	0	5	1.75	138

⁵ 2025 Developmental Services Workforce Survey, pre-publication findings. Robert Hickey, Queen’s University.

Ability to hire

Most managers surveyed agree (21 percent) or strongly agree (49 percent) that direct funding has helped them hire the right support worker. Still, nearly one in five respondents disagree (3 percent) or strongly disagree (14 percent) that direct funding helped them find the right worker.

Figure 10: Has direct funding helped you hire the right support worker(s)?



Recruitment

Figure 11 presents the relative importance of various sources for recruiting direct support professionals. The 'other' category primarily included various personal networks, such as churches, family connections, independent facilitators and friends. These personal networks and connections through existing staff members were the most important sources for recruitment.

Figure 11: Important sources for recruiting support workers

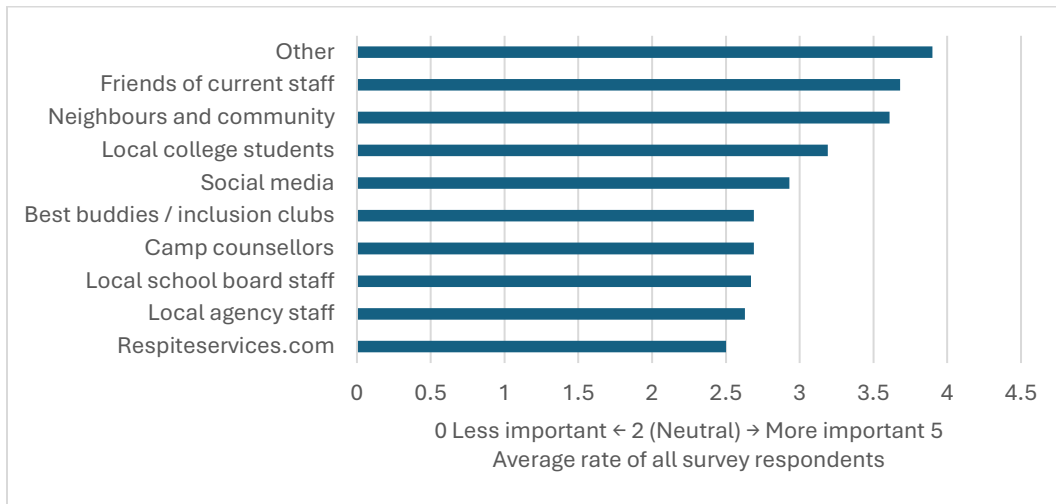
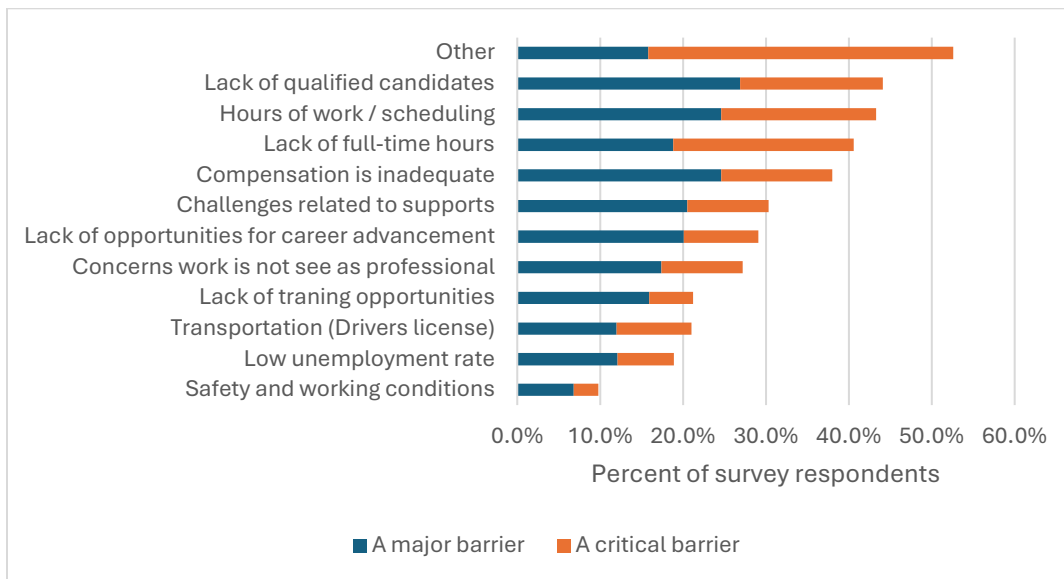


Figure 12 presents the major and critical barriers to recruitment experienced by survey respondents.

Figure 12: Major and critical barriers to recruitment

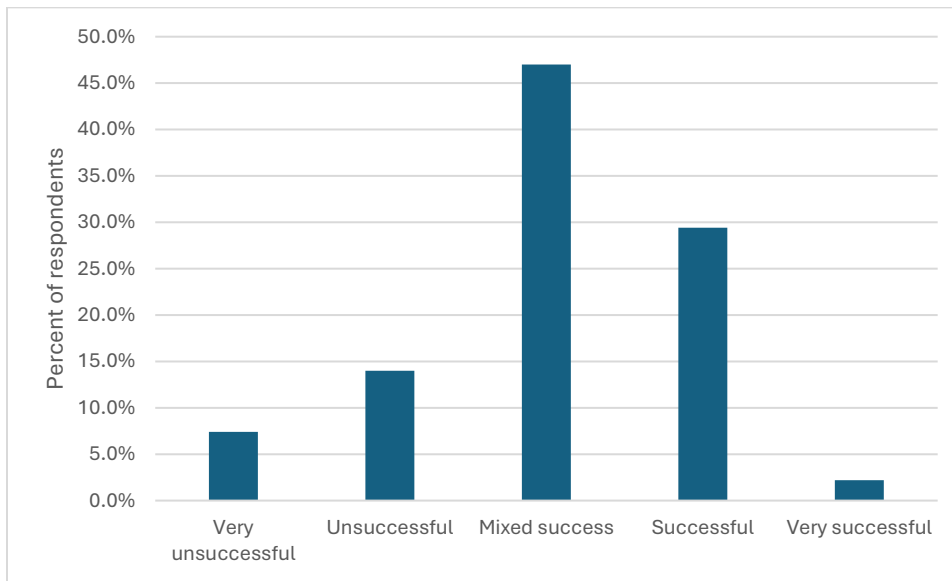


The ‘Other’ category of barriers to recruitment mostly included economic factors such as, “extremely low paying job” and “having enough money to pay staff is the biggest barrier!” Limited funding also results in managers only being able to offer minimal hours; “Our needs would be an add-on to someone’s schedule.” These comments reinforce the main top categories including hours of work, lack of full-time hours, and inadequate compensation.

Another set of comments in the other category reflected the lack of qualified candidates. This is consistent with the top category identifying the lack of candidates as being the most prevalent major/critical barrier to recruitment.

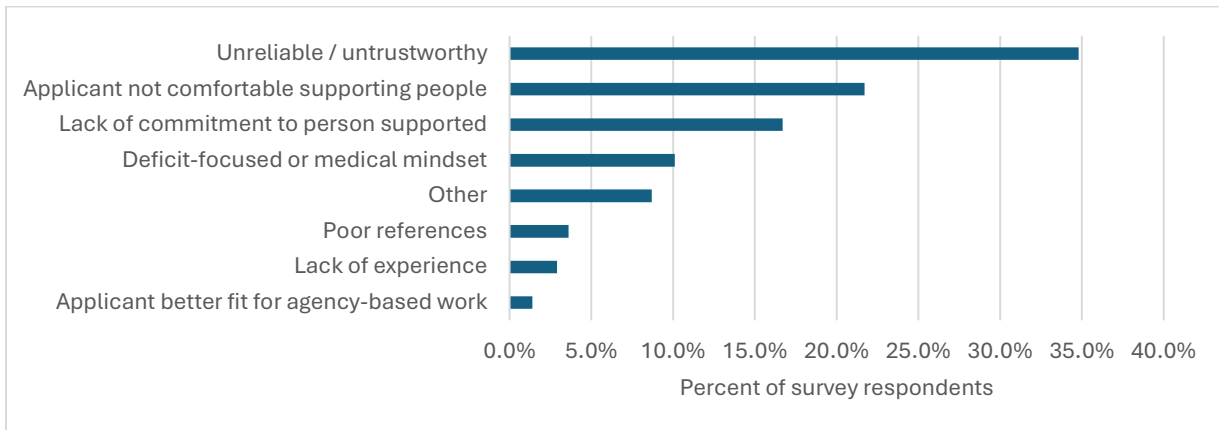
Overall, managers reported mixed success in their recent recruitment efforts. Figure 13 displays manager assessments of their recent recruitment experiences. Over 7 percent of respondents were unable to find qualified candidates (very unsuccessful) and an additional 14 percent reported an insufficient applicant pool (unsuccessful). At the same time, nearly 30 percent of managers felt that their recent recruitment experiences were successful. Only 2 percent of managers reported having more qualified applicants than needed (very successful).

Figure 13: Relative success of recent recruitment efforts



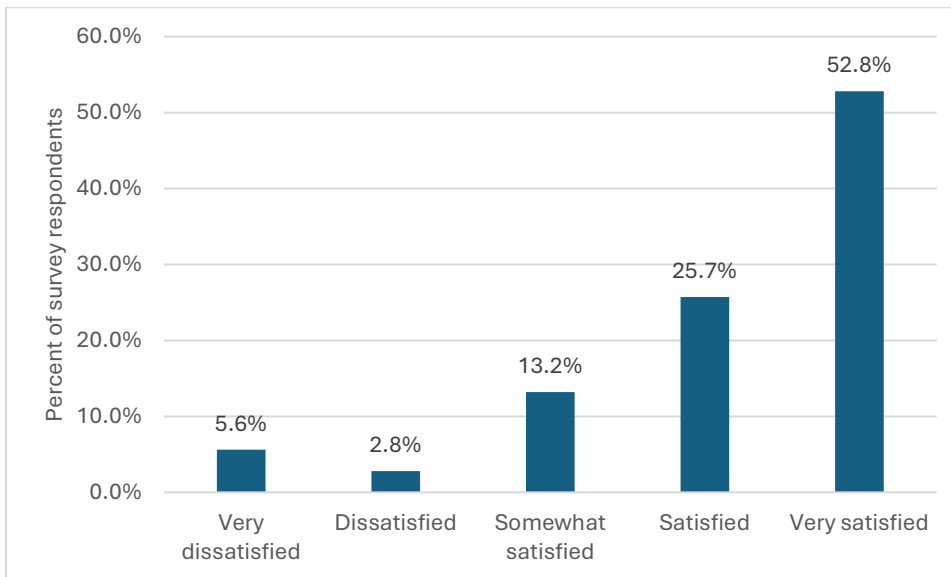
Recruitment success may also reflect manager abilities to identify red flags in the hiring process, thus avoiding inappropriate hires. Figure 14 summarizes what managers consider disqualifying factors among job candidates. Another form of workforce instability reflects the micro-staffing models supported by direct funding. Most managers have only a handful of staff, so an unreliable worker exacerbates the care burden on families. Nearly 35 percent of respondents listed unreliable/untrustworthy as the most concerning characteristic that would prevent them from hiring a direct support professional.

Figure 14: Disqualifying factors in direct support staff



Most managers were satisfied (26 percent) or very satisfied (53 percent) with their current support workers. While this high satisfaction rate reflects positive outcomes in recruitment efforts, it also raises concerns at the end of the scale with over 8 percent of managers dissatisfied/very dissatisfied. Lack of qualified candidates and other barriers to recruitment suggests that a sizeable minority of managers feel stuck with unsatisfactory staff.

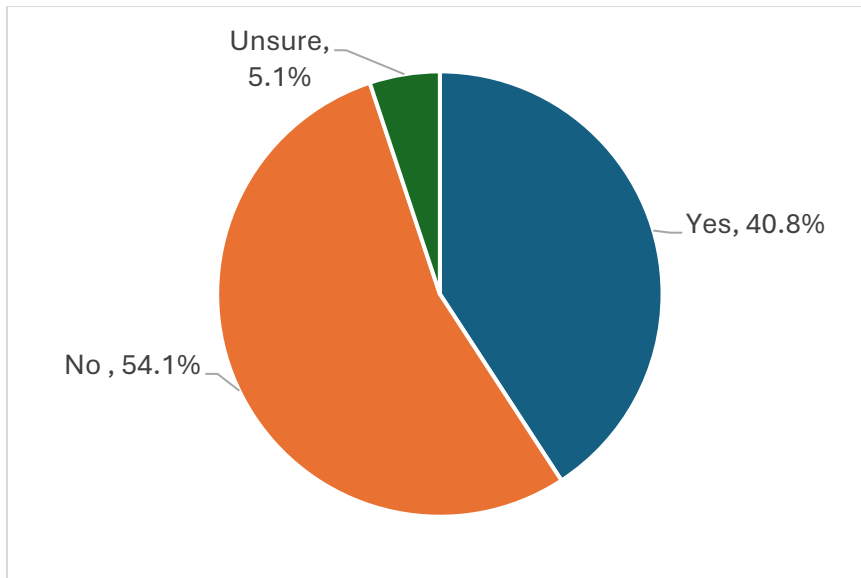
Figure 15: Satisfaction with current support workers



Workforce instability

Despite high satisfaction with workers and the feeling that direct funding has helped managers support a rich life for the person supported, over 40 percent of survey respondents experienced staffing turnover in the previous year. This finding suggests that structural factors, such as compensation and available hours, not relational factors between managers and staff, drive workforce instability.

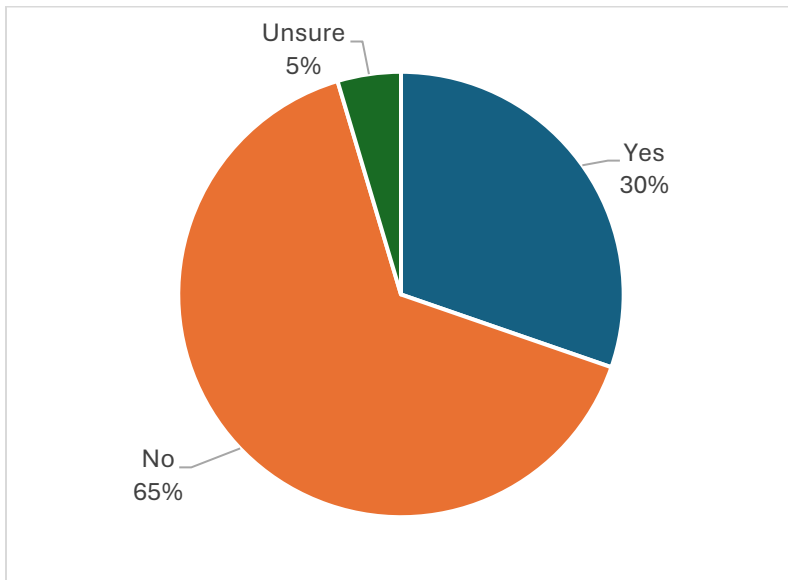
Figure 16: Proportion of direct funding recipients who experienced staff turnover



While turnover rates varied by individual recipients, the surveys captured 118 separations in the context of 450 continuing staff. Therefore, the average turnover rate among directly hired staff was slightly higher than 26 percent.

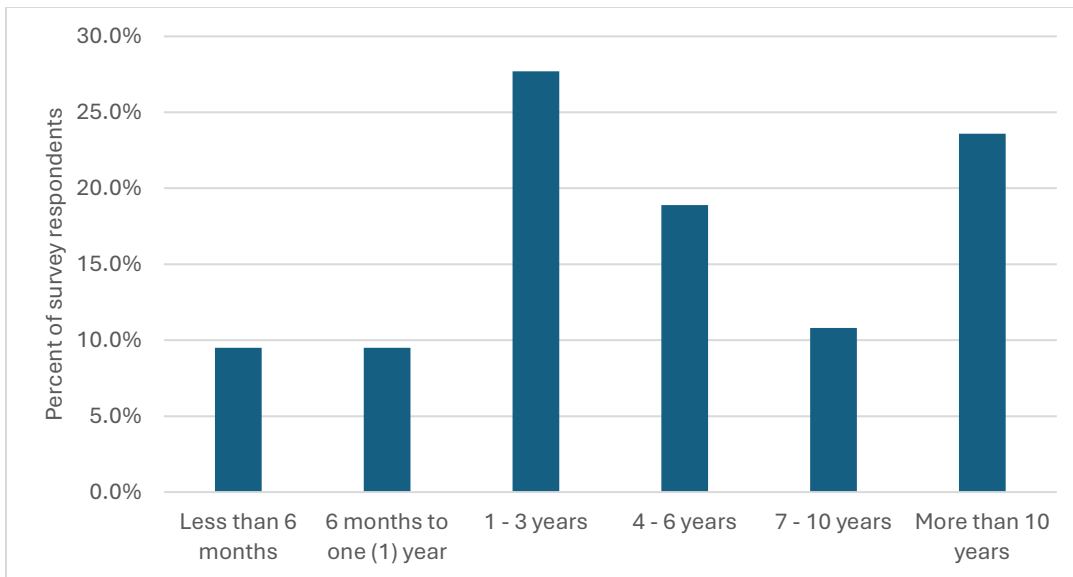
Another metric of workforce instability captured by the survey was the prevalence of job vacancies. Job vacancies occur when managers have funding available but are unable to find appropriate workers. Some 30 percent of respondents reported having a current vacancy.

Figure 17: Direct funding managers with current workforce vacancies



While the survey found multiple points of evidence of workforce instability, nearly one-quarter of managers reported that average staff tenure was more than ten years (see Figure 17). Such long-term tenure, both in terms of an employment relationship under a direct funding regime, as well as consistency of the support relationship between the DSP and person supported, reflects important evidence of stability.

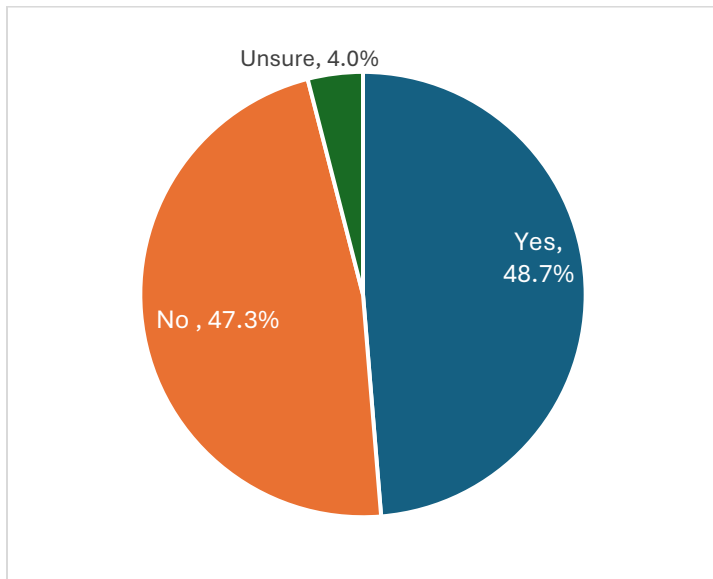
Figure 18: Average tenure of Direct Support Professionals



Finally, another indicator of potential workforce instability, and risk for managers, is the lack of formal employment contracts or contracted services agreements. Figure 18 shows that nearly half of all managers do not have formal contracts with employees or

independent contractors. On the one hand, this may reflect a closer, less formal relationship. However, such informal practices introduce risk to both managers and direct support professionals.

Figure 19: Formal employment contract or contracted services agreement



Skills, qualities, and characteristics

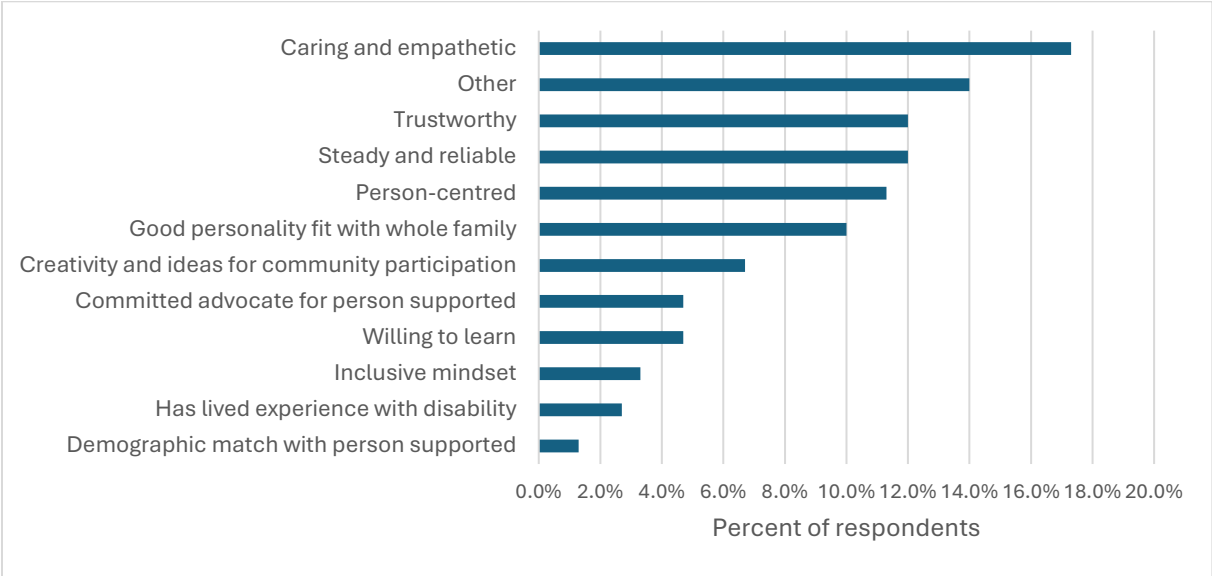
Families and people who manage direct funding consistently emphasize that the quality of disability supports is shaped less by formal credentials and more by the personal qualities, values, and relational capacities of the people providing support. Across survey responses, respondents describe an ideal Direct Support Professional as someone who is trustworthy, reliable, and genuinely committed to the dignity and well-being of the person supported. Person-centred values, strong interpersonal skills, and the ability to build respectful, reciprocal relationships are seen as foundational, particularly given the intimate home and community settings in which support is delivered. While experience and technical skills remain important—especially for individuals with complex or medical needs—families repeatedly signal a willingness to train the “right person” when alignment of character, values, and fit is present. Taken together, these findings suggest that effective support in direct funding contexts depends as much on character and relational competence as on formal qualifications.

Qualities and skills sought in DSPs

People who manage direct funding for disability supports consistently emphasise that the most important qualities in a Direct Support Professional (DSP) are personal character,

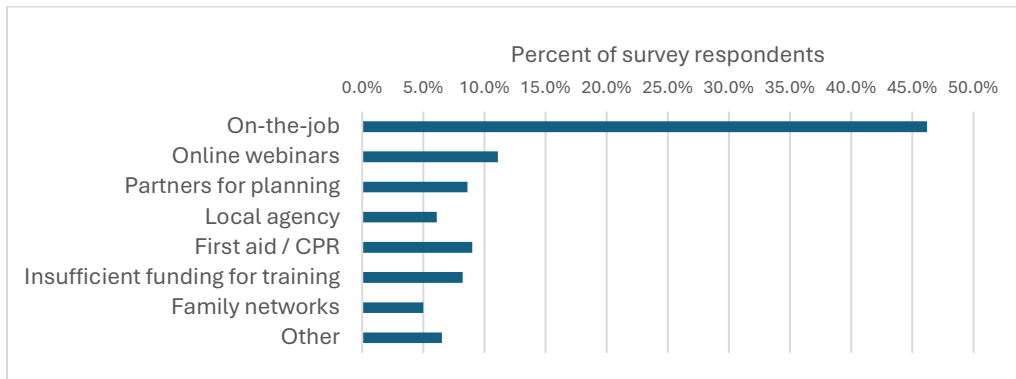
trust, and person-centred values (Figure 20). Across responses, families prioritise empathy, caring, and compassion above all else, noting that effective support begins with genuine respect for the person as a whole human being, rather than a focus on tasks or diagnoses. Closely linked to this is the importance of trustworthiness, honesty, and integrity. Families need to feel confident that support workers will act ethically, respect boundaries, and keep their loved ones safe in both home and community settings.

Figure 20: Most important quality of characteristic of a DSP



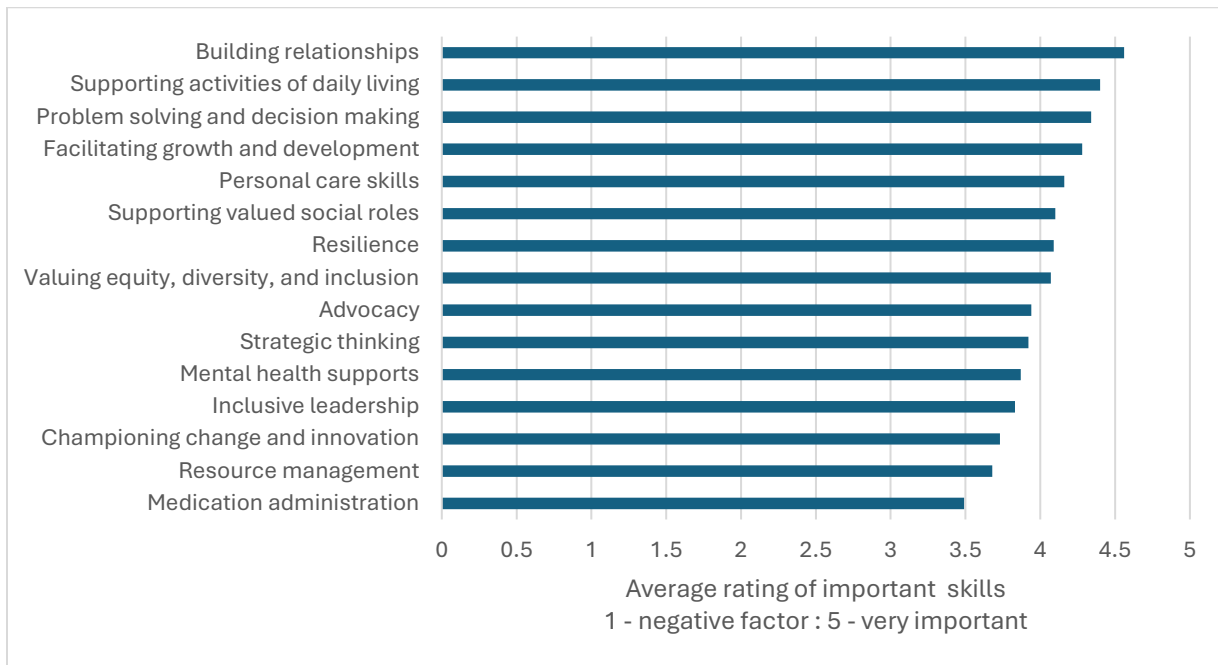
Reliability and dependability are described as non-negotiable. Respondents frequently stress punctuality, consistency, and follow-through, highlighting the critical role reliable support plays in enabling families to work, rest, and manage daily responsibilities. While personal qualities are prioritised, respondents also value relevant experience, training, and disability-specific knowledge, particularly in relation to autism, complex needs, communication, and personal or medical care. However, many families indicate they are willing to train the right person if strong values and commitment are present (Figure 22).

Figure 21: Training provided to support workers



Person-centred practice is a dominant theme throughout the feedback. Families want workers who see beyond labels, respect autonomy, treat adults as adults, and support each person’s vision of a good life. This includes building genuine relationships, taking time to get to know the individual, and ensuring a strong personal fit. Effective communication, deep listening, patience, and emotional regulation are viewed as essential skills for maintaining safety, trust, and positive relationships.

Figure 22: Relative importance of skills



While respondents rated many skills as important/very important (4/5), the top four skills reflect similar core competencies found in the perspectives of agency-based HR managers. Building relationships is central to the skillsets of DSPs. Somewhat unique to

the perspectives of direct funding managers, the technical skills of supporting activities of daily living were more highly rated than their agency-based counterparts.

Finally, respondents highlight the need for workers who can think independently and adapt to changing situations. Good judgement, common sense, initiative, flexibility, and creativity are highly valued, particularly as workers often operate independently in family homes and community settings. Overall, the feedback makes clear that families seek Disability Support Workers who combine competence with compassion, reliability with flexibility, and skills with strong inclusive values.

Table 3: Key Themes: Qualities and Skills Sought in Disability Support Workers

Theme	What Families Are Looking For
Empathy, Caring & Compassion	Genuine care, kindness, patience, respect for the whole person
Trustworthiness, Honesty & Integrity	Honesty, ethical behaviour, safety and peace of mind for families
Reliability & Dependability	Punctuality, consistency, follow-through
Experience, Training & Disability Knowledge	Autism and disability experience, care, safety, and emergency response skills
Patience, Calmness & Emotional Regulation	Calm, gentle presence; ability to slow down and de-escalate
Community Inclusion & Relationship-Building	Supporting belonging, community participation, and reciprocal relationships
Judgement, Common Sense & Problem-Solving	Sound decision-making, critical thinking, and practical judgement
Person-Centred Values & Respect for Autonomy	Seeing beyond labels, respecting choice, treating adults as adults
Communication & Listening Skills	Active and deep listening, clear and respectful communication (including non-verbal/AAC)
Initiative, Independence & Self-Direction	Ability to work independently without micromanagement
Flexibility, Creativity & Adaptability	Adjusting plans, creative approaches, responsiveness to change
Willingness to Learn & Openness	Openness to feedback, learning new skills, and individualized approaches

Managing Direct Funds

Managing direct (individualized) funding is a central but often under-recognized component of Ontario’s developmental services system. For families and people who take on this role, direct funding extends well beyond financial oversight and requires ongoing responsibility for recruitment, scheduling, payroll, compliance, training, and coordination of supports.

The survey findings make clear that managing direct funds frequently resembles running a small business, demanding a broad set of administrative, human resource, and problem-solving skills. This section examines who is primarily responsible for managing direct funding, the time and expertise required, and the administrative capacities that enable—or constrain—families’ ability to sustain individualized supports over time.

The administrative burden of managing direct funding is highly gendered with mothers being responsible among nearly 80 percent of survey respondents (Figure 23).

Figure 23: Person primarily responsible for managing direct funding

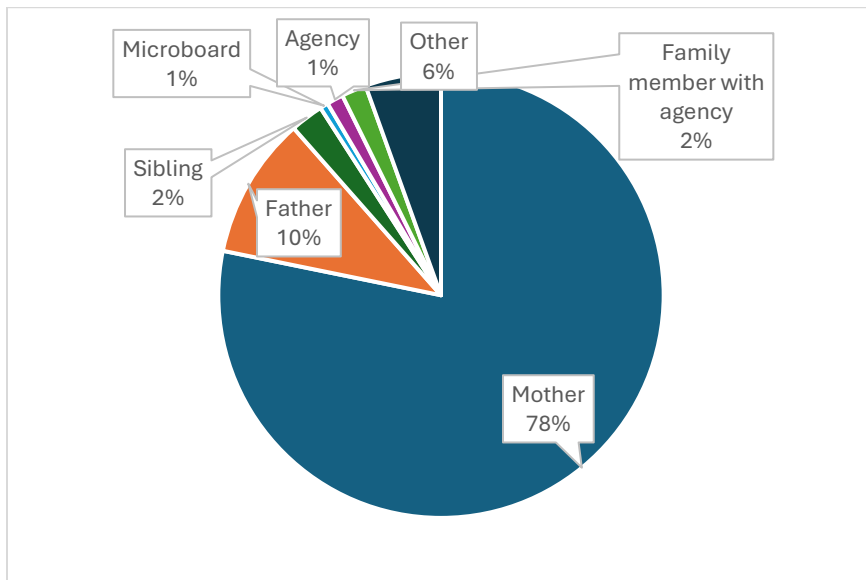
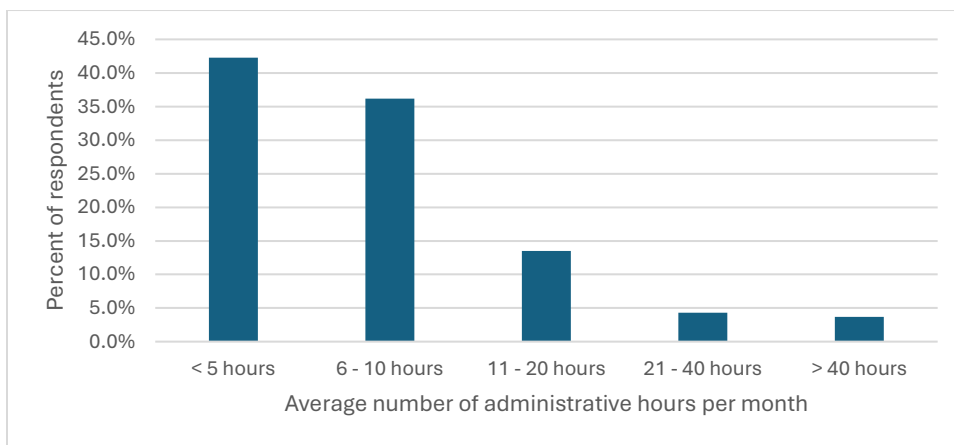


Figure 24 presents the average number of hours respondents spent managing direct funds, one measure of this administrative burden.

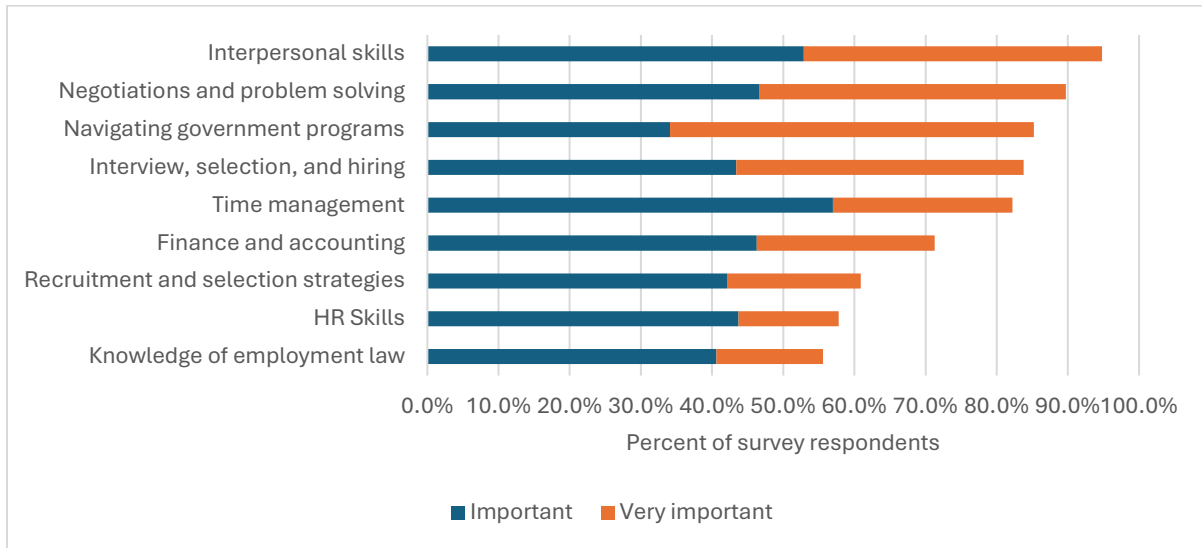
Figure 24: Time spent administering funds each month



While the responses cluster toward the lower end of the spectrum, these hours reflect the unpaid labour of these managers, mostly mothers of the person with disabilities.

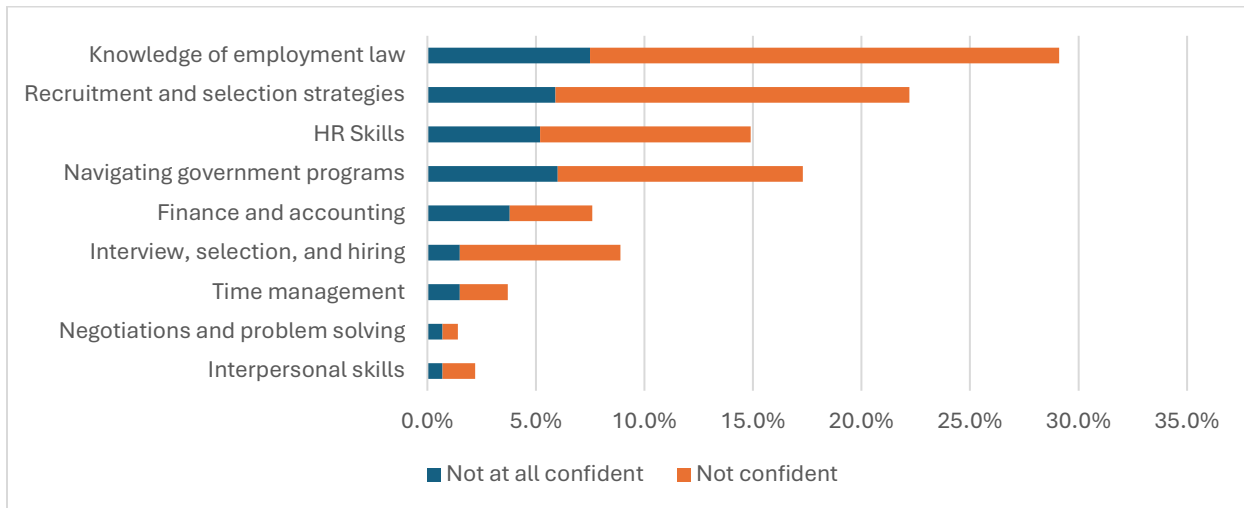
Survey respondents identified a broad range of skills needed to effectively manage direct funds. Figure 24 presents the ranking of important/very important administrative skills from the perspective of those managers. Interpersonal skills and complex problem solving and negotiation skills topped the list.

Figure 25: Importance of skills to manage direct funding



Survey participants contrasted what they thought were important skills needed to effectively manage direct funding against their current level of confidence in each skills set (Figure 25). A potential source of risk for managers is lacking confidence in their knowledge of employment law. This is further heightened by the lack of infrastructure supports to provide legal advice or funding to support that external function.

Figure 26: Satisfaction / confidence with current skills



Open-ended comments on administrative skills

Families who manage individualized (direct) funding for disability supports consistently describe administration as both essential and overwhelming. What enables them to sustain this responsibility is not the simplicity of the system, but their commitment to their family member’s safety, dignity, inclusion, and quality of life. Families continue managing funding because agency-based alternatives are often unavailable, inflexible, or misaligned with the needs of people with disabilities.

Open-ended comments in the survey captured a range of administrative challenges and critical areas of support, as shown in Table 4.

Table 4: Survey Comments Regarding Administrative Supports and Barriers

Theme	Description
Administrative Burden	Payroll, invoicing, reconciliation, compliance, and reporting create a full-time workload for families
Paid Bookkeeping & Payroll Support	Funded accountants/bookkeepers dramatically reduce stress and errors
Independent Facilitation	Guidance, planning, continuity, and advocacy that sustain long-term support
Workforce Recruitment Challenges	Difficulty finding, vetting, and retaining qualified support workers
Peer & Family Networks	Learning, emotional support, and shared problem-solving with other families
System Complexity	Multiple portals, ministries, reimbursement models, and inconsistent rules

Funding Insufficiency	Low funding amounts, delayed reimbursements, and inability to keep up with wages
Trust & Respect	Families feel scrutinized rather than trusted to manage funding responsibly

The most significant enablers are access to paid administrative supports such as bookkeeping and payroll, support from independent facilitators, and strong peer networks with other families. When families can offload technical tasks—such as payroll deductions, invoicing, and reconciliation—to trusted professionals, the work becomes more manageable. Independent facilitators are repeatedly identified as critical partners who provide continuity, guide decision-making, promote person-centred practice, and reduce burnout over time.

Despite this support, families report that the administrative burden remains excessive. Managing funding often resembles running a small business, requiring expertise in human resources, accounting, employment law, and compliance. Many families feel the system is distrustful and punitive, requiring constant documentation, reimbursement, and monitoring, even when needs are stable and long-term. The lack of compensation for unpaid family managers—contrasted with agency management fees—was frequently described as unfair and unsustainable.

Another critical factor affecting sustainability is workforce instability. Families overwhelmingly identified the difficulty of finding, training, and retaining qualified support workers as their greatest challenge. Survey participants noted that the absence of centralized worker registries, recruitment support, and career pathways places the full burden of workforce development on families. Insufficient funding levels, delayed reimbursements, and rising wages further undermine families’ ability to offer competitive pay and consistent hours.

Overall, families are clear that individualized funding works—but only because they absorb the hidden costs of administration, coordination, and risk. Sustainability would be significantly improved through funded administrative support, simplified and trust-based reporting systems, centralized worker recruitment, adequate funding levels, and recognition of family labour. Without these changes, individualized funding remains effective but fragile, relying on family resilience rather than system design. Table 5 links the critical administrative supports with the infrastructure needed to make managing direct funding sustainable for families and service users.

Table 5: What Helps vs. What Is Needed

What Helps Families Sustain Management	What Families Say Is Needed
-----------------------------------------------	------------------------------------

Funded bookkeeping and payroll support	Simplified, trust-based reporting and fewer invoices
Independent facilitators and planners	Compensation for unpaid family fund managers
Peer networks and family-to-family mentoring	Centralized worker registries and recruitment support
Upfront funding and advance payments	Adequate funding indexed to wages and real costs
Clear schedules and consistent support teams	Integrated funding across ministries
Personal organization systems and templates	Government-funded admin tools, software, and training

Conclusion

This report provides one of the most detailed examinations to date of the experiences of families and individuals who manage direct (individualized) funding for developmental services in Ontario. The findings demonstrate that direct funding is an effective policy tool for achieving person-centred, responsive, and inclusive supports. When families can directly manage resources, they report greater control, stronger relationships with support workers, improved safety and consistency, and better alignment with the values and aspirations of the person supported.

At the same time, the report reveals a fundamental contradiction at the heart of Ontario’s direct funding system. Direct funding works—not because the system is well funded or well designed—but because families absorb an extraordinary and largely invisible burden of unpaid labour, administrative complexity, and risk. Managing direct funding often requires the equivalent of running a small business, with responsibilities spanning recruitment, human resources, payroll, employment law, training, scheduling, financial reconciliation, and compliance. These demands fall disproportionately on mothers and primary caregivers, compounding existing caregiving, employment, and advocacy responsibilities.

The workforce findings further underscore the fragility of the current model. Families place the highest value on trust, reliability, person-centred values, and relational continuity—qualities essential for safety and quality of life. Yet systemic constraints such as inadequate funding levels, fragmented hours, lack of centralized recruitment infrastructure, limited training opportunities, and broader labour market pressures directly undermine families’ ability to recruit and retain qualified support workers. High turnover and persistent vacancies are not the result of poor management by families, but predictable outcomes of structural underinvestment and policy design.

A critical insight from this study is the challenge it poses to the prevailing narrative of “choice.” For many respondents, managing direct funding is not a preferred option but a necessity driven by the absence of viable agency-based alternatives, particularly for people with complex needs, in rural or underserved regions, or where safety and continuity are paramount. In these contexts, direct funding is best understood not simply as a mechanism of choice, but as a compensatory response to broader system failures.

Despite these challenges, families persist because direct funding consistently delivers better outcomes for the person supported. It enables dignity, respect, autonomy, and meaningful participation in community life. The evidence in this report suggests that the question is not whether direct funding works, but whether it can be made sustainable, equitable, and accessible without relying on family exhaustion and unpaid labour.

Strengthening Ontario’s direct funding system will require a shift from reliance on family resilience to intentional system design. Key priorities include funded administrative supports such as payroll and bookkeeping, simplified and coordinated reporting models across different funding programs, adequate and indexed funding levels, centralized recruitment and workforce infrastructure, stable access to training, and formal recognition of family labour. Without these reforms, direct funding will remain effective but fragile—producing strong outcomes for some, while remaining inaccessible or unsustainable for many others.

Ultimately, this report raises questions about the experiences of direct funding managers. For example, families that manage direct funding may not be asking for more control; they may hope for a system that works with them rather than relying on them. Designing such a system is essential not only for sustaining direct funding, but for advancing equity, inclusion, and long-term stability across Ontario’s developmental services sector.