

Eligibility, Funding, and Assessment Coordinator (EFAC): Fidelity Checklist

Purpose

- The fidelity checklist is a foundational document to guide and critically evaluate the **design, scaling, and implementation** of Eligibility, Funding, and Assessment Coordination and the Eligibility, Funding, and Assessment Coordinator role.

Rating System

- The ratings for each item should be revisited by multiple partners – including relevant project teams and DSP management – at major milestones of the building, scaling, and implementation of the EFAC role. This will ensure the role stays consistent with its fidelity criteria and will provide an opportunity to evaluate what areas may need more attention and resources.
- The rating system is as follows:
 - **Green:** Working Well
 - **Yellow:** Attention Needed
 - **Red:** Urgent Action Needed

Design

Building Block	Rating
1. A clear and accurate job description that explains the high expectations for performance.	
2. Regionally based and connected to local LACs and IPSCs to best support participants at different stages of need and life within the region.	
3. Establishing service standards and ratios to ensure quality work and a manageable workload .	
4. Clear EFAC values and principles that, when layered on top of Eligibility and Individualized Funding policy's values and principles, will guide EFACs to make appropriate and consistent subjective decisions.	
5. Implementation and design to be informed by evidence based best practices, research and tools.	
6. Whole person approach to understanding support needs in the context of the person's network and community environment.	
7. Multi-sector responses that span across all Departments, as outlined in the Remedy.	
8. Robust training for EFACs on assessment tools and the nuances of balancing the system and the individual.	

Scaling and Sustainability

Building Block	Rating
1. Understanding all components of the system including how to evolve and work collaboratively with other roles and departments.	
2. Internal and cross–sector leadership and creative resourcing involving a combination of existing and new resources, as well as pooled funding from different silos.	
3. Strengthening Eligibility, Funding, and Assessment Coordination by addressing issues as they arise and carrying forward lessons learned into the training of newer EFACs.	

Effective Implementation

Building Block	Rating
1. Systematic induction and training strategy with a strong focus on the EFAC Framework, assessment tool, in-situation training, and support process to ensure rapid implementation.	
2. Understanding that government services are complementary to natural supports in community and can help increase individuals self-reliance and family/community capacity.	
3. Ensuring the DSP funding assessment and funding experience is individualized while balancing a consistent operationalization of DSP policies and procedures. The system is objective and fair.	
4. Planned opportunities for regular interaction between fellow EFACs, and with their managers ('connected' leadership).	
5. An open culture characterized by transparency, participation, feedback reviews and evaluations, and independent monitoring.	
6. A strong rights protection and safeguarding framework and commitment to training.	
7. Shared values and Practice Framework, regular connections through a provincial network for best practices.	