

SAMS

EVALUATE • INNOVATE • EDUCATE

Creating a new way: working together for change



Development

Change

Progress

Innovation

Evolution

A Resource to Support Service Transformation



SAMS – Standards and Monitoring Services

What We Believe

Vision: For disabled persons and family/whānau to be the primary contributors to service and sector development.

Mission: To provide evaluation, education, research and other service development services that effectively enable people with a disability and their families to participate in the creation and maintenance of high quality disability services in New Zealand.





SAMS

EVALUATE • INNOVATE • EDUCATE

ESTABLISHED 1979

The SAMS logo is a length of woven flax. Flax is found throughout New Zealand. Its use symbolizes the strength achieved when there is an inclusive and unified approach.

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Introduction

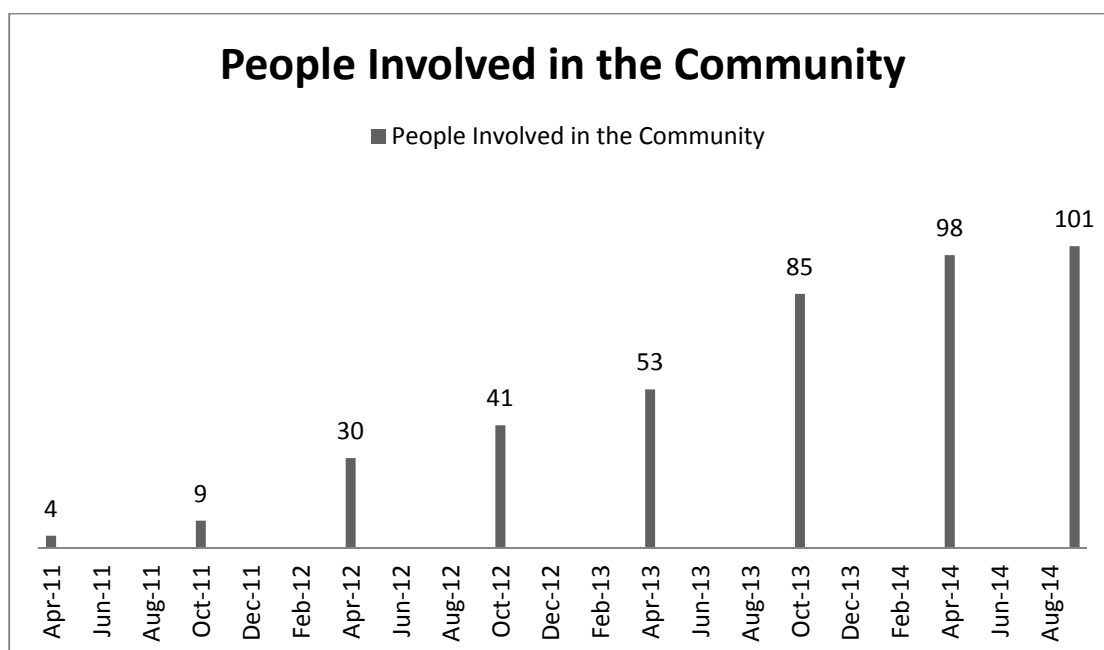
An exciting challenge many organisations are facing is how to make change so they operate in ways that result in increasing an individual's and families' ability to be valued contributors in our community.

The material, contained in this resource, will be of particular value to organisations wishing to go through a change process to be more fully aligned with an Enabling Good Lives (EGL) approach.

This resource describes how organisations have made positive change that has transformed their way of operating from segregation and group based activities to a personalised approach that enables people to participate in “everyday things in ordinary places”.

This resource is drawn from the experience SAMS (Standards and Monitoring Services) has gathered while working in twenty locations, with four organisations, involving over one thousand staff between 2011 and 2014. This resource is based on real experiences, in current New Zealand conditions. The evidence provides an optimistic picture of what organisations can achieve.

Below is an example of what type of change is possible, in a reasonably short timeframe, without additional resources. The diagram (below), relates to the service transformation project involving the SkillWise service in Christchurch, displays the number of individuals involved in activities/interests of their choice in the community for some part of their week (ie, not segregated disability services).



As of July 2014, this number included 15 people who had obtained employment through their contacts in the community.

People's jobs included:

- | | |
|-----------------------------------|---------------------------------|
| - gardener at a high school | - kitchen hand |
| - maintenance at a primary school | - cleaner at retirement village |
| - shop assistant | - labourer |
| - horticulturalist | - check out operator. |
| - scaffolder | |

Rather than focus on theories of organisational change, the resource is built on actual approaches and tools that have demonstrated themselves to be effective. In particular, valuable in creating ways of working with others that result in people creating good lives for themselves. The resource overviews approaches that are successful in moving from a 'service provision' model to a ' facilitation based' approach that builds on individual strengths and contributes to building a more valuing community.

"It' s pretty cool how it' s not just the guys accepting what they can do but it' s society; it' s a whole new culture change..... people are more capable than they think."
- SkillWise support staff

Some of the components identified in this resource will be familiar to many services. It is critical to stress SAMS experience of service development strongly indicates the desirability of being strategic and making linkages. The interrelationships between different change aspects, the sequence of activities, the customising of approaches, the alignment of strategies and the credibility of any external facilitators are all significant contributors to the success of the transformation process.

Of importance to many organisations is the learning that service transformation does not need to be time consuming, complex or costly if there is:

- a clear set of principles and an agreed direction
- a willingness to make change (management, staff and Board)
- co-ordinated input from credible skilled educators/mentors
- a strengths based approach to service transformation
- practical skill sharing
- an emphasis on "customising" approaches and supports while using natural supports and existing community resources
- a linking of resource to increase their individual value.

The organisational characteristics demonstrated as key to successful service transformation include:

- Bravery
- Clarity of destination
- Dedication
- Reflection
- Flexibility.

"The" Utopia" project (change process) offers so much to the people we support but the thing is that it is not just for the people we support; it is for everyone. We all need to see achievement in our lives, success, happiness, healthy relationships and bountiful opportunities."

- SkillWise support staff

What this resource isn't

An academic theory regarding service transformation

A comprehensive manual on "change" strategies

A formula to be imposed

What this resource is

A collection of approaches and techniques that have been demonstrated – in current conditions in New Zealand – to be useful in bringing about service change that results in an individualised approach where people are connected with community

A selection of practical resources and frameworks that can assist the change process

A suggested process and key ideas – based on recent experiences – intended to assist organisations.

This resource draws on the experience of various SAMS evaluators and educators and builds on a range of SAMS materials including the following SAMS developed publications/resources:

"How to Move from Being a Service Provider to Facilitating Individualised Support", SAMS (Rebekah McCullough and Hannah Perry), August 2014,

Enabling Good Lives Guidelines, SAMS, January 2014,

"Strengthening Community by Creating Links" SAMS (Rebekah McCullough and Hannah Perry), April 2013, and

"Evaluation for a New Era" SAMS (Mark Benjamin), May 2013.

The Challenge of Transformation

Transformation

In an organisational context, a process of profound and radical change that orients an organisation in a new direction and takes it to an entirely different level of effectiveness. Unlike 'turnaround' (which implies incremental progress on the same plane) transformation implies a basic change of character and little or no resemblance with the past configuration or structure.

<http://www.businessdictionary.com/definition/transformation.html#ixzz3AiEclptq>

Transformational change

“a complete change in an organisation, designed to bring big improvements”

Cambridge Business English Dictionary © Cambridge University Press

Many organisations are currently in a process of exploring how they can:

- be principles based, ie, Enabling Good Lives principles
- individualise their supports and services
- shift authority to enable individuals and families to have the “say so” in their lives
- move to a “facilitation based” approach, ie, how to make it easier for people to create good lives for themselves – not attempting to provide people with what they consider to be a “good life”
- use generic (mainstream) community resources
- focus on assisting people to experience ordinary lives in ordinary places (rather than segregated services).

Transformation – evolution or revolution

Definitions

Evolution

“The gradual development of something”

<http://www.oxforddictionaries.com/definition/english/evolution>

Revolution

“A dramatic and wide-reaching change in conditions, attitudes, or operation”

<http://www.oxforddictionaries.com/definition/english/revolution>

Whether an organisation is on a pathway of continued development or undertaking a fundamental shift, this resource is a pragmatic contribution to approaches that can “make a difference”.

There are many important variables, linked to organisational transformation this resource does not attempt to cover. Some of these significant variables SAMS has noted include:

Belief	A commitment to the importance of change
Clarity	Certainty about the purpose of any change
Congruence	Ensuring the way change is approached is consistent with stated values and the desired destination
Optimism	Trusting change is not just desirable but possible
Flexibility	Adapting to new knowledge as it appears
Alliances	Creating allies
Exposure	Exploring new ways of looking at things and doing things
Creating spaces	“Having a go” at something different











The above areas all appear to be important aspects of building a culture where positive change is more likely.

For many organisations, the type of transformation desired in New Zealand at this point in time, represents a fundamental shift of attitude, authority and approach. SAMS experience suggests that organisations who simply choose to “rename” current practices, embark on a change process without obtaining a mandate

from disabled persons and families or attempt to operate without challenging a “business as usual” approach will have limited success with transformation.

Organisations, or areas/teams within organisations, who are serious about positive change will leave very few stones unturned. The exciting task of development and the territory of transformation also will reveal unexpected and unplanned challenges. Many organisations and teams SAMS have worked with have found it useful to map out the general change direction before undertaking a one step at a time journey.

The diagram below highlights some of the key areas of potential change. These are summarised as the following shifts:

From		To
Person is framed as a “client”, “consumer” or “service user”		Person is seen as an individual, part of a family and a citizen
Assessment based		Aspiration based
An individualistic view		An approach that values networks – family/friends
Direction set by funder		Direction set by individuals and families
Focus on building better services		Focus on building valuing communities
Control held by management		Control held by disabled persons and their families
Hierarchical relationships		Reciprocal relationships
Programmes and services determined by service contracts		Supports tailored to individual
“Quality” defined by an external body		“Quality” subjective - defined by the individual and family
A deficit focus		Strengths based
Risk averse		Optimistic expectation
Compliance		Responsiveness - innovation and flexibility
Dependency creation		Interdependence focus
Resource is concentrated		Resource is diffused

For a great number of organisations, transformation involves them in a process of significant change. The challenge is both to think about things differently and do things differently.

“Doing the same thing over and over, yet expecting different results is the definition of crazy.” (Unknown)

SAMS has worked closely with a number of organisations as they have explored new – and more effective – ways of assisting people to create good lives for themselves and be contributing citizens. Over the last five years, SAMS has developed and gathered a series of approaches and resources where there is evidence that these things make a positive and practical difference.

Service transformation can be complex. Many things are interrelated. One apparently small adjustment to how things are done can have a huge impact on many other aspects of how the service operates. There are constant challenges as organisations operate in an environment where some things are done in a ‘new’ way ... but, other pre-existing expectations and processes are not yet altered to support the “new” approaches. There can be intended and unexpected consequences to every change. This resource is based on practical changes and approaches that have made positive development more likely and achievable.

There are some indications approaches and practices from the manufacturing and medical “industries” have been absorbed into the human services. Some of these approaches have influenced how organisations operate. An example of this may be a preoccupation with so called evidence based guidelines. In some instances, organisations have developed comprehensive procedure manuals that determine how people operate. In a transformation process, some of these approaches need to be reviewed and potentially changed if organisations are going to shift from a “paper focus” to a “person focus”. There are some researchers who now suggest that even in their place of origin (ie, the manufacturing and medical industries) these approaches are being questioned (see below):

“The number of [evidence based] clinical guidelines is now both unmanageable and unfathomable”, Greenhalgh and co-authors note. In one 24-hour period in 2005, for instance, a hospital in the United Kingdom admitted 18 patients with 44 diagnoses. The relevant U.K. national guidelines for those patients totaled 3,679 pages. Estimated reading time: 122 hours.

https://www.sciencenews.org/blog/context/evidence-based-medicine-actually-isnt?utm_source=Society+for+Science+Newsletters&utm_campaign=f5e6ca6c14-Editor_s_picks_week_of_August_18_2014&utm_medium=email&utm_term=0_a4c415a67f-f5e6ca6c14-1044910

It is important to state the approaches included in this resource are based on the principle of “self-determination”.

As organisations gather a better appreciation of who people are and what they want, they can then begin the process of changing what they do and how they do it in order to make it easier for people to achieve.

"It is a journey of personal development for the staff and the person."

- SkillWise support staff

By definition, this involves a one person at a time approach.

Before organisations can configure themselves, allocate resources or develop a strategic plan for change, they are required to gain a deeper genuine understanding of who they are interacting with. A prerequisite for this type of change is that time is invested in knowing:

- what connections people have,
- how people like (need) to communicate
- people's preferences and strengths
- what aspirations (dreams) individuals and families have.

"It's become clear that this kind of transformation is dependent first and foremost on a shared values base. It requires each and every person to have a belief in and a commitment to a strong community being enriched by the contributions made by and connections formed with each and every citizen. Every human being has value, gifts and can make this world a better place. People who live and/or work within the disability sector need to recognise and truly believe in this, and the wider community will be strengthened as a result."

Hannah Perry, SAMS

Clues to Success: what successful service transformation can result in:

It can be extremely helpful to be clear on the results you are attempting to create in the change process. SAMS strongly advocates that the primary source of information regarding the effectiveness of any transformation process needs to be the lived experience of disabled people and their families.

When there is a robust feedback loop, where disabled people and their families are routinely able to express how the organisation is impacting on their lives, then disabled people and their families are enabled to influence the change process, ie, affirming what is working well and adapting approaches that do not have good outcomes for people. Organisations who implement new approaches can rely on feedback from disabled people and their families not just to refine the change process but to lead the change process.

Feedback gathered in 2013, from a range of people involved in the “Utopia” project (a service transformation process), indicate the types of outcomes and feedback organisations can expect to note when a positive change process is “on track”:

Individual outcomes included:

- Increased confidence
- Affirmation of personal and cultural identity
- Increased self determination
- Increased self-expression
- Increased belonging

Staff/organisational feedback included:

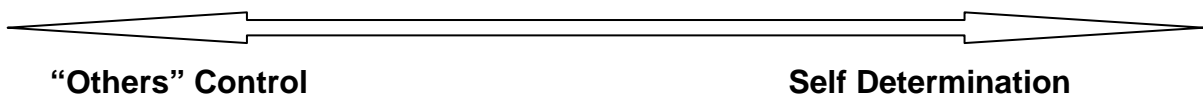
- Enthusiasm
- Division between “service types has diminished”
- “We are past the tipping point – we couldn’t go back to groups now”
- Natural and spontaneous change in behaviour when people experience or see a better way of doing things
- Doing it differently for everyone
- Increased expectations
- “It is a journey of personal development for the staff and the person”
- An incremental approach can result in a “ripple effect”, ie, more individuals and staff are keen to operate in this new way
- “We are looking outside now”
- Decreased reliance on paid support staff has included benefits such as increased self-esteem and sense of belonging, decreased cost (and paperwork!) as support is based on natural, sustainable, positive relationships.

Principles

One way an organisation can measure the success of a change process is to monitor whether people are expressing they are increasingly experiencing that the “principles” are coming to life in their contact with the organisation. SAMS supports the use of the “Enabling Good Lives” principles being used in this way.

Enabling Good Lives Principles

1. Self-determination: disabled people are in control of their lives,
ie, disabled people have the “say so” over what they do in the service,

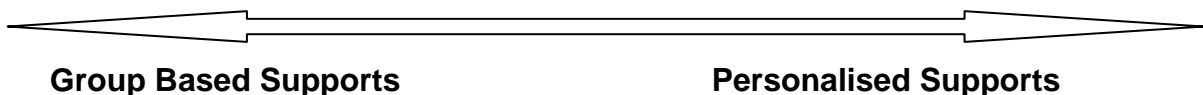


2. Beginning Early: invest early in families and whānau to support them to be aspirational for their disabled relative, to build community and natural supports, and to support disabled people to become independent, rather than waiting for a crisis before support is available.

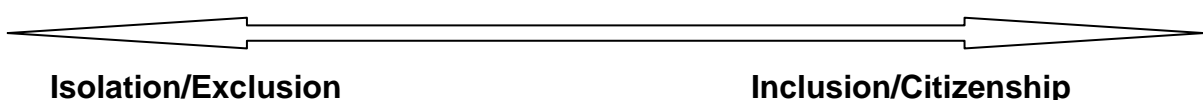
Note: for some services, this relates to being “proactive”, ie, assisting people to build what they want and not waiting until a crisis before attention is paid to an individual or family.



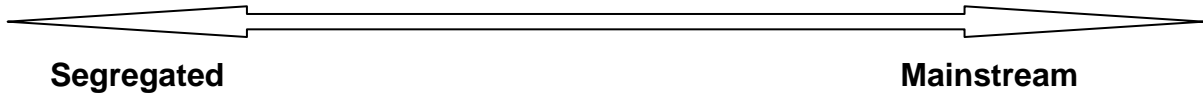
3. Person-Centred: disabled people have supports that are tailored to their individual needs and goals, and that take a whole life approach rather than being split across programmes.



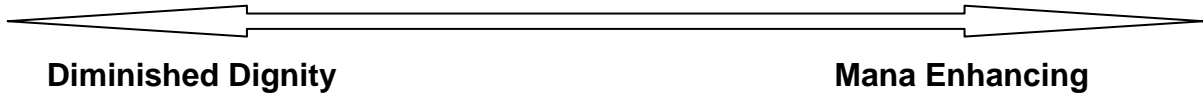
4. Ordinary Life Outcomes: disabled people are supported to live an everyday life in everyday places; and are regarded as citizens with opportunities for learning, employment, having a home and family, and social participation - like others at similar stages of life.



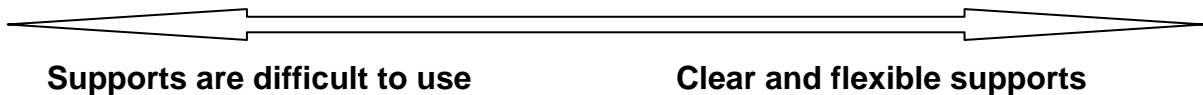
5. Mainstream First: disabled people are supported to access mainstream services before specialist disability services.



6. Mana Enhancing: the abilities and contribution of disabled people and their families are recognised and respected.



7. Easy to Use: disabled people have supports that are simple to use and flexible.



8. Relationship Building: supports build and strengthen relationships between disabled people, their whānau and community.



Changed Lives (the best evidence of transformed services)

Leon's story

Leon's support worker decided to spend some time getting to know Leon as an individual, rather than supporting large groups of people as the service had traditionally operated.

Get to know people

One of the first things Beth did was sit down with Leon and talked to him about the people in his life. They made a circle of support; identifying who the people in Leon's life were that meant the most to him. Leon's mum came out tops; they lived together, depended on one another, and had a shared interest in Speedway.



Beth's next mission was to get to know Leon's mum. Together they talked with Leon about his interest in cars, his desire for work, and his other hopes and dreams for the future.

Who is in the person's life and what are their interests?



Leon and his mum had often attended Speedway, and his mum had a friend who worked at Kaiapoi Wreckers and in the pit crew at Speedway. He already knew Leon, but his mum reconnected them with the intention of getting Leon some tasks to do. Since then, Leon has been a crucial part of the pit crew team.

The story doesn't stop there!

Build on connections

One of Leon's friends, William, was also interested in cars. One connection after another led to Leon fulfilling his dream to be part of a crew that dismantled, built and raced a Derby car with the support from Kaiapoi Wreckers and his mate, William. The team participated in the practice paddock day and the demolition derby in March (where unfortunately the car conked out on the second round – but that means it lives to race again!!)



Pay attention for more opportunities

One of the guys Leon performs pit crew duties for owns a scaffolding business. Leon demonstrated how skilled and capable he is, and has since secured himself employment as a painter for Elliot Scaffolding, two days a week.



An Overview of the Key Elements of a Service Transformation Process

There are many valid approaches to describing the steps an organisation can take in a change process.

SAMS work tends to take a pragmatic approach that is principles (values) based, collaborative and seeks to result in the maximum positive impact for disabled people and their families in the least time.

Our belief is that change is more likely to be sustained and embedded when the people involved experience the value of the changes in their day to day lives. Rather than extended periods of introspection or a comprehensive analysis of potential change strategies, SAMS promotes an approach to change that aims to positively transform lives (not services) – demonstrating the possibilities that can be achieved when the same resource is used differently.

Over the last ten years, SAMS has observed several organisations invest heavily in comprehensive frameworks to measure people's "quality of life", spend scarce resource on external consultants, or embark on expensive staff training ventures. While we completely support the intent of these actions, SAMS has noted this investment does not necessarily result in disabled people and their families experiencing significant positive change in their lives.

SAMS pragmatic approach suggests that if individuals and families are not reporting they are experiencing a "better life", then the organisation's change strategy may be making things different – but, not necessarily better.

The process SAMS has observed to be effective in enabling positive change for individuals is relatively simple (but not always easy).

Organisations are required to be clear on their commitment to transformation, enable staff to connect more deeply with the people they are working with, take the lead from disabled people and their families, use existing community assets and networks, and then make it easier for people to create good lives for themselves 'one person at a time'. This necessitates a more flexible approach to the use of staff time, potentially equipping staff with a new range of skills and learning how to "get out of the way". As the process unfolds, it becomes clear where the organisation can strengthen existing approaches as well as where fundamental change may need to occur in order to support the new way of seeing and doing things.

"Some of the world's greatest feats were accomplished by people not smart enough to know they were impossible!" -Doug Larson

An approach to service transformation

	Element	Purpose
a	Evaluation/Review (know what is happening now)	<p>Establish clarity about existing service strengths, assets, challenges and aspiration.</p> <p>This process can assist in the development of establishing a “destination”/vision for the transformation process, establish a “baseline” of current service outcomes and identify strengths and strategies that can be a basis for change.</p> <p>Note 1: SAMS promotes a Developmental Evaluation (DE) approach. Note 2: While an internal review (self-assessment) may have merit, there may be added value in an external evaluation where evaluators have specific knowledge related to sector history, aspiration and challenges.</p>
b	Consolidate a vision	<p>Clarity of direction and how the organisation will contribute to this.</p> <p>A clear description of “what things might look like” if the organisation was incredibly successful.</p> <p>This may include mapping out the territory of change (expectations, roles and approaches).</p>
c	Develop a shared frame of reference	<p>Enabling people to connect through shared ideas, purpose, frameworks and language.</p> <p>This may include:</p> <ul style="list-style-type: none"> • establishing “clues” that indicate progress/success, ie, how will we know something positive is happening? • linking with allies.
d	Equip people to be effective	<p>Ensuring people have the technical skills to achieve (customised staff education).</p> <p>Note: There is dubious value in embarking on staff education until there is organisational clarity about the direction the organisation is heading in.</p>

e

Demonstrate

SAMS promotes the whole staff team accessing the same “training”.

Coaching and mentoring

Selecting people who will translate the vision, approach and skills into action.

This is where some can show others “how it is done”.

When done incrementally (one step at a time), it becomes clear what is required and adaptations can be made.

“Learning” is owned by the people involved – not an external source.

g

Reflection

Gather examples of “what has worked” and why.

Explore challenges and develop new approaches.

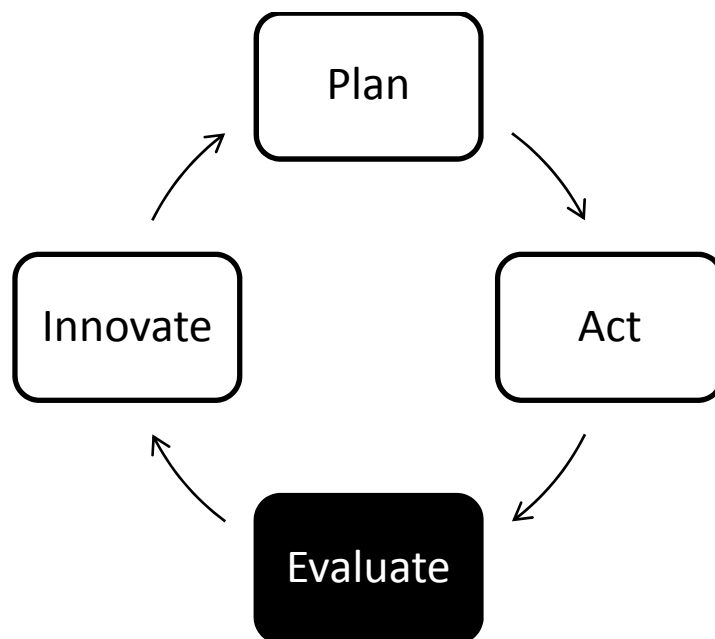
Celebrate successes.

Identify champions (people who can coach and mentor others).

Review alignment

Ensure organisational processes, procedures and practices are consistent with supporting the changed direction and emerging successes.

Know What Is Happening Now



Prior to embarking on a journey of change, it can be useful to gain an increased understanding of the outcomes, for different people, as a result of their interaction with the current services. This provides vital information regarding practices that can be a foundation for change and some attitudes or actions that may need to be replaced.

There are multiple approaches to undertaking an evaluation or review process. Approaches can be internal and straightforward (eg, a SWOT analysis – Strengths, Weakness, Opportunities and Threats) or external involving a multi-perspective approach (eg, Developmental Evaluation). SAMS strongly favours an approach like “Outcome Mapping” (Sarah Earl, Fred Carden and Terry Smutlyo) or “Developmental Evaluation” that have a principles based collaborative approach to development central to the approach.

Ideally, as a first step towards service transformation, the evaluation will enable the organisation to:

- understand what is working well for different groups who connect with the organisation
- explore challenges different individuals (or groups) may be facing
- gather together perspectives on what people consider to be “ideal”

- reflect on perceived strengths and areas for development
- collate ideas and strategies for positive change
- introduce, encourage or support evaluative thinking
- establish a “baseline”
- contribute to the development of a “vision”.

Introduction to Developmental Evaluation (DE)

In a new era of defining disability supports and services, it is critical we have ways of supporting growth, evaluating effectiveness and creating innovation. In particular, we need to have flexible and constructive ways to ensure people with ‘lived experience’ can lead. This leadership relates to both the supports people are directly involved with and the design and review of the systems that define and accompany these supports. Who is better placed than people with a lived experience of disability to determine value, discover innovation and promote great practices?

SAMS believes that an effective evaluation process will:

- a) be proactive, ie, it will constructively address emerging issues before they mature into significant challenges
- b) provide leadership opportunities, ie, people with a lived experience of disability, who become evaluators, will gather the insights, skills, experiences and evidence to enhance their involvement in peer support and other leadership roles
- c) enable the gathering of information to form a solid evidence base for further innovation
- d) identify particular approaches/strategies that appear to ‘work well’ for individuals and families, ie, collating real time success stories to inform others
- e) explore the degree to which core values, principles and aspirations are being met.

SAMS Developmental Evaluation is concerned with providing an environment where individuals, families, support people and others can express their experiences. It examines the effectiveness of approaches and it values flexible and creative responses to individual preference, aspiration and circumstance.

Essentially, SAMS Developmental Evaluation asks the question: “how’s it going?” This question (or a similar question) assists people to explore what is working well for them, what the challenges are and encourages people to reflect on their experience. It would be common to also ask the question: “How could things be done in a better

way?” Again, this open ended questioning invites people to think about ideas for improving their experience.

SAMS has discovered two things that often determine the depth and breadth of responses to these questions, ie, ‘who is asking’ and ‘how the questions are asked’. An evaluation approach must have certain approaches that maximise:

- Trust, eg, that information will be treated in a respectful manner or that differences will not be judged or exploited.
- Safety, eg, that contributors will not lose a service by complaining.
- Confidence, eg, the evaluation process is designed to ensure an equitable and accurate representation of participants' perspectives.

First, SAMS considers it is a great advantage if the evaluators include people who have a lived experience of disability, ie, disabled people and their families.

- This can immediately create a shared point of reference that is useful in building the connection and trust that is often needed for people to explore important issues.
- Secondly, evaluators are equipped with the skills required of a respectful and skilled listener.
- Thirdly, the evaluation process (ie, how it is done) is open, personal and flexible.

WHAT CAN AN EVALUATION LOOK LIKE?

- Disabled persons and their families are not just the key contributors to evaluation, but the designers and facilitators of the evaluation process.
- A team of people, including trained disabled persons and/or family, use a consensus approach to determining evaluation findings.
- ‘Safety’ and appropriate use of funding are examined during the process. However, the primary focus is whether supports and services are enabling individuals and families to create a “good life” for themselves.
- Collaboration is key. All stakeholders are focused on working together for development. This minimises an adversarial approach emerging.
- The way information is collected is customised to reflect individual/family circumstances.

There are a number of key evaluation principles and practices. These practices create an environment more likely to result in a successful evaluation. These are summarised as follows:

- ensuring evaluation practice is built on the foundation of clear principles, eg, full participation of disabled people and families in key roles
- clarity of intent, ie, assisting development, not compliance
- awareness that an important aspect of developmental evaluation is to prepare an environment that is likely to result in some people discovering new (and hopefully better) ways of doing things
- ensuring the integrity of the evaluation organisation, eg, to increase credibility it is important to demonstrate that you, as an evaluation organisation, are practising the things you will evaluate others on, eg, partnership, flexibility, openness etc
- an understanding of personal development
- an appropriate outcome based framework
- flexible, fair, constructive and inclusive approaches
- approaches that are culturally appropriate.

What Developmental Evaluation Can Cover

Attitudes

Evaluation can place people in an environment where there is temporary heightened awareness. Evaluation assists people to explore the values they have and whether their experiences and actions match them.

Aspirations

Central to evaluation is discovering the preferences, strengths and aspirations of individuals and their families. As the evaluation process unfolds the people's stated aspirations are then matched with their experience of supports. This process either becomes self-affirming or naturally highlights areas for further exploration and development.

Potential

Developmental evaluation is focused on making it easier for people to experience a good life. Some questions, for example: "what does a good life look like for you?", generally result in increased awareness of potential.

Priorities

Examining the things individuals, families, support people and organisations choose to prioritise is a fundamental building block to raising awareness. Thoughtful attention to what is seen as "most important" can be lost in day-to-day life.

Developmental evaluation highlights which priorities are determining the shape of what people are doing.

Processes

In this context “process” refers to a series of steps that are taken to achieve a desired outcome. A process is a journey where the destination is anticipated but not always certain. Increased awareness involves attention to the steps individuals/families are taking and where they may lead.

Practices

Practices are the actions that make up the processes with which we are involved. Developmental evaluation provides an opportunity to explore whether what is actually done is consistent with stated values, preferences and aspiration. As mentioned, it has been central to the SAMS approach, for three decades, to place an individual’s or family’s “plan” at the centre of the evaluation process. Evaluations will explore whether the “plan” accurately reflects people’s strengths, preferences and objectives. The evaluation then examines whether the actions of the support systems or services are aligned with the “plan” in an optimal way and whether adaptations or improvements can be made. The individual’s or family’s “plan” is a core document.

HOW DEVELOPMENTAL EVALUATION WORKS

SAMS has discovered that the most effective approach is to create a relaxed, personal and informal environment. Discussions and conversations replace interviews, and participants are invited (not expected) to engage. As discussions progress, the art of a good developmental evaluation is to bring to the surface new ideas.

Developmental evaluation enables individuals and organisations to:

- pay attention
- take responsibility
 - seek new knowledge
- commit to change
- discover allies
- share power and authority
- build trusting relationships.

Paying attention

Simply having “outsiders” (ie, evaluators) observing and initiating discussions generally results in people paying additional attention. Increased attention is given to what is done, why it is done and how it is done. Increased attentiveness can lead to insight.

Taking responsibility

If evaluators are seen as open and constructive then individuals are able to more easily take ownership of their attitude and behaviour. Developmental evaluation makes efforts to identify and describe strengths in order to encourage personal responsibility in a supportive environment. Developmental evaluation encourages positive change by recognising that everything is on a continuum. Constructive change simply begins with the willingness to take responsibility and initiate positive movement on the continuum.

Seeking new knowledge

As an evaluation unfolds, connections are made and areas requiring further development are identified. Individuals now look at “what to do about any things that need to change/improve”. There is substantial value in a ‘developmental’ approach. “Red tape” is minimised and “values” can be more fully experienced as a living reality as participants in the evaluation discover new ways of working together.

Committing to change

Evaluations can provide a map of the territory in which people find themselves. A desire to implement change is more likely because strengths have been identified and future steps have been clarified. The evaluation has begun to create an inventory of assets and possibilities. Ideally, people have recognised that everyone’s quality of life can improve and that change can be exciting and rewarding.

Discovering and creating allies

The evaluation process is likely to highlight allies that currently exist. People may discover more willing “friends” than they anticipated. Rather than polarise individuals and groups, developmental evaluation is more likely to connect people with a shared frame of reference and desire for improvement.

Sharing power and authority

As systems seek to find ways to personalise supports and services, developmental evaluations can explore and encourage disabled people, families and organisations to design new ways of doing things that are empowering, risk aware and aid the shift towards ‘the person’ (with support as necessary) rather than the ‘the system’ having the choice and control over what and how things are done. It is important to note that SAMS not only believes that people should be “at the centre” of the supports they use, but they should actively direct them.

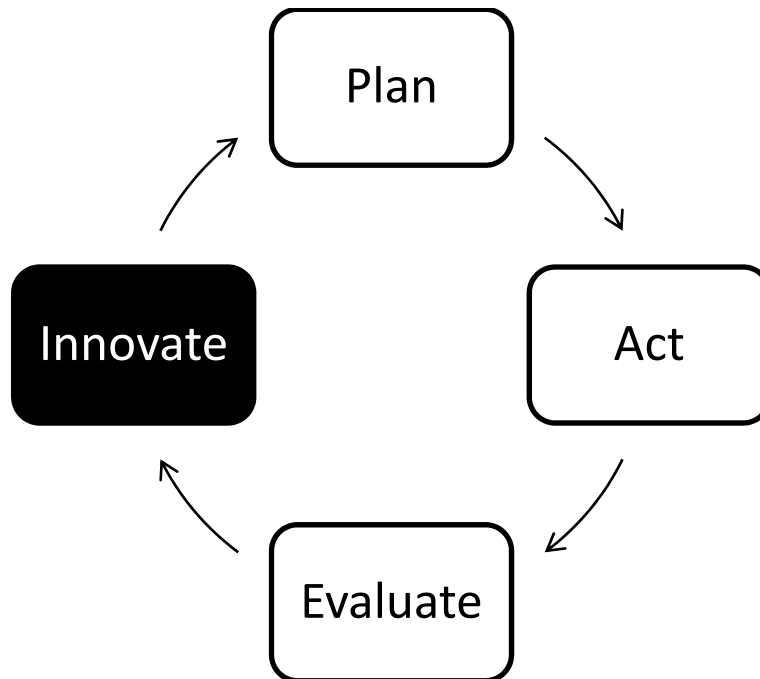
Building trusting relationships

Being principles and values based, developmental evaluation encourages disabled people and the support networks or organisations in their lives to align and focus on

what is right for the individual. This can also be of assistance when things go wrong so issues can be addressed in a timely and open manner rather than in crisis or without firm foundations to fall back on.

Essentially, SAMS has discovered that Developmental Evaluation is about providing an environment where people can explore their experiences, imagine what could be done differently and express how positive change could take form. A significant aspect to this is enabling people to appreciate things from a different perspective.

Developing a Vision



An initial step towards change involves achieving clarity regarding what an “ideal” situation would be like. This “vision” (for the potential future) can be big, bold and optimistic. The objective of creating a shared vision is to establish a direction (destination) and to motivate. This gives organisations the ability to think way beyond “what is” and explore “what could be”. SAMS has noted more can be achieved when focus is placed on possibilities and potential as opposed to reacting or responding to things people believe are no longer “fit for practice” or relevant.

Ideally a vision will describe, in general terms, what the situation will be like if everything is incredibly successful and people are living an optimal life. The purpose of a “vision” is to be inspirational (not practical!) and to assist organisations to be intentional, ie, is what we are doing moving us towards our “vision”?

The vision may describe the personal, interpersonal, social, economic or organisational change that people would love to experience. A “vision” is imaging and mapping out the best possible outcomes.

“Whether you think you can or think you can’t, you are right.”- Henry Ford

A “vision” will highlight beliefs and may be much deeper and wider than the scope of the organisation's immediate focus.

SAMS has found it useful to identify what this “vision” may look like from various perspectives, for example

- Disabled people
- Families
- Staff
- Management
- Community.

The types of questions that may make it easier to develop a vision could be:

- What would our ideal community be like?
- What change do we want to bring about?
- Imagine we are really successful – what would be different?
- What could be people's experience if everything worked really well?

Before a “vision” is confirmed, it can be useful to ensure that there is clarity around the meaning people connect with the words and concepts expressed. Keeping the vision free from jargon will assist this.

A simple test for this may be to ask the question: “Would a person I meet casually at a cafe or bar understand my dream/vision?”

Mapping the Territory of Change

Exploring what constitutes effective approaches to positive change is critical.

There are many ideas and opinions that cannot be supported by actual results. Over the last four years, SAMS has identified some commonly held myths associated with service transformation. These myths include:

Potential Myth

Possible Reality

Positive change requires additional funding.

Transformation may require using existing resources differently and exploring how to use “generic” resources.

Service transformation takes a long time and will involve prolonged introspection.

Significant change can happen within a reasonably short timeframe, eg, two years.

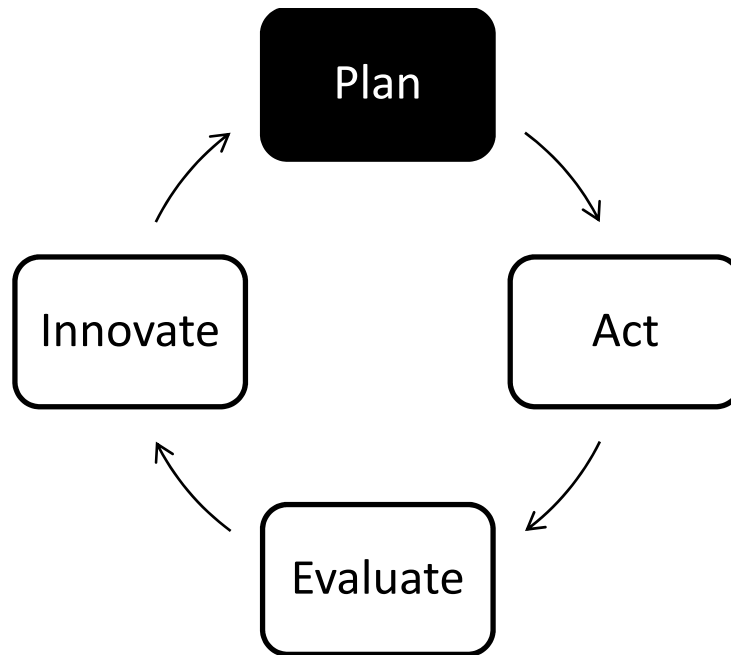
To experience real change we will need a whole new staff team.

When people experience the positive benefits of change they may adapt and adopt new and better approaches. A small number of staff may not want to do things in a different way.

To transform our service is likely to be expensive and require costly assistance.

Significant positive change can occur with minimal additional costs – providing the process is strategic and any external support has credibility.

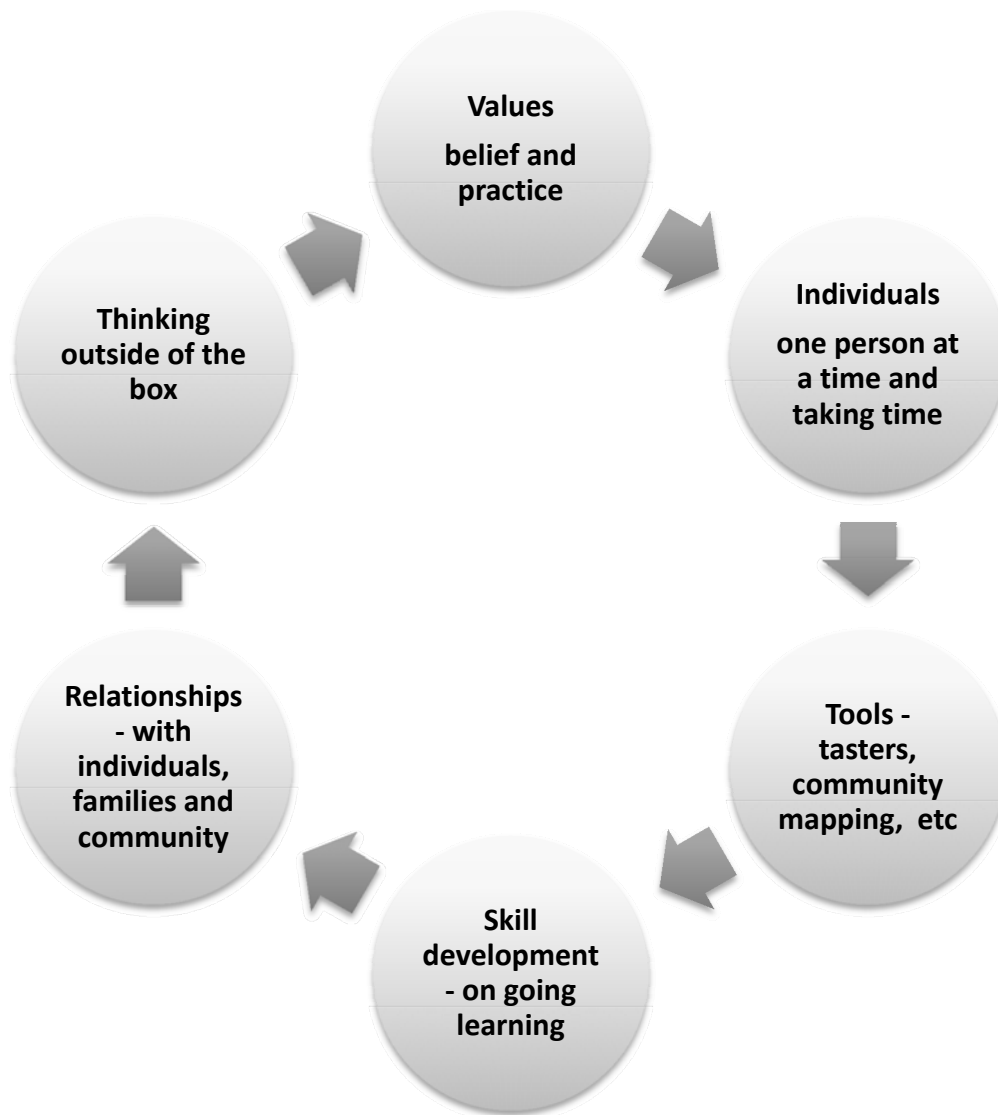
Developing a Shared Frame of Reference



Key Strategies for Multi-layered Service Transformation

The following practices and/or strategies are all inter-related. Understanding this is likely a multi-layered approach to service provision, not a linear approach, is key to successful implementation. This will mean that there may be multiple changes or activities happening concurrently in order to bring about positive change.

Each aspect of the change process is likely to frame the next stage of development (see below):



Values, Beliefs and Actions

Ideally, there is a commitment to a shared vision by ALL involved and a demonstration of values that truly enhance and promote the worth and dignity of each person.

Actually believing in the benefits and worth of supporting individuals to have a good life is the foundation for other aspects of service transformation. This develops a strong and lasting base for which other aspects of change can rely on and build on. There must be commitment at all levels of the organisation. This does not mean that everyone will 'get it' at the same time. Some people will take longer or need more time to process change and this is to be expected.



In a SAMS approach, the initial stages of effective change - the driving force - has come from the individuals being supported, their networks as well as staff and management. In effective change, we note it has been critical boards and management teams were totally committed to the process.

It is incredibly useful to engage in a number of forums, workshops and training sessions with staff when they first embark on a change journey. This enables staff to understand the purpose of change, the impacts of this on the individuals being supported and their families. It is important for staff to recognise, reflect on and at times challenge their own beliefs and practices so that they are able to be a positive part of the process of development.

Families, whānau and support networks can also be included in this process. For many families, the idea of 'change', especially when you are 'mostly' pleased with the

service currently being provided, may seem risky and/or unnecessary. Many families, as they are included in the process, are pleasantly surprised at the achievements and developments as they unfold.

As the changes progress, family, whānau and support networks of individuals will continue to develop and refine their own roles and connections. This can add to the promotion and understanding of how changes can be of benefit. A natural development of an inclusive transformation process is the increase of people sharing experiences with one another on both a formal and informal basis.

Review, change or adaptation of current policies, job descriptions and practices may be important. This becomes an opportunity to reflect on new ways of supporting individuals that are aligned with stated values and beliefs. For example, if individuals are pursuing activities in their communities, then filling in attendance records at a day centre will no longer be relevant. New ways to document how a person is spending their day/evening/weekend may need to be developed along with a review of other policies and practices.

As change begins to take place, it will become clear what previous “systems” need to become aligned with a new way of doing things. Rather than attempt to “guess” this, at the beginning of a transformation process, it is possible to take a more organic approach and respond to these situations as they naturally emerge.

Being committed to a “one person at a time” approach, ie, personalised support

This approach enables support staff to get to know the person as an individual - to learn how to support them to make decisions about having a good life according to their unique preferences, strengths and aspirations.

This “one person at a time” approach also enables those in the community to get to know an individual with whom they have a shared interest, as opposed to attempting to interact as a ‘group identity’.

Many experiences demonstrate that once a person is known and connected, then their networks, positive relationships and opportunities keep growing.

Taking time

Change takes time and with this can come positive learning and development. For some people, making changes comes easily and for others more time and support is required. Building on success – one step at a time – is critical. Taking the time to make change, in a way that enables individuals to feel positive and be in control, is crucial for disabled people and their families.

To impose a “good idea” is likely to turn it into a “bad idea”.

Taking time and building on positive experiences is a way to restore trust and optimism.

A commitment to “self-determination” requires the change process to move at a speed that is determined by the individual.

Communication and relationships

This pertains to the need to continue to inform, educate, involve and listen to all of the various stakeholders in this process of change.

It is acknowledged that change involves the loss of what is familiar. For some, this can be a daunting prospect. It is also recognised that the process of working collaboratively to provide positive, meaningful and life-enhancing options requires a greater amount of ‘respectful perseverance’ as individuals, families and the community learn to support what a ‘Good Life’ can be for each individual.

Regular and frequent opportunities need to be created to share, reflect, review, encourage, and challenge in order to support individuals in the ways that are most meaningful and effective for them. Once again, ensuring that there is a range of ways to communicate with the individuals being supported, their families and other providers can increase the chances trusting relationships are developed. Within these relationships, change can be supported, as it is a process in which all are involved and in which the individual is given back control.

Skill development

Service transformation is likely to involve people learning a range of new skills. Supporting people in a segregated setting or supporting ‘groups’ is quite different than assisting individuals to identify their interests, access their communities, network and connect with others who share interests.

Staff who are supported to learn a range of ‘belonging strategies’ are crucial to the development of this change. They may assist the person to learn about what they like by walking around their neighbourhood (community mapping), supporting them to try things out (tasters) or preparing them for new skills and expectations (skill development, scheduling). All of these contribute to helping a person ‘belong’ (Appendix 1). As activities, interests, and places are identified as possibilities for an individual then the focus is moved from a “disability” issue (eg, do you have the ability to do this?) to a support issue. For example, if an individual is interested in Italian cooking, they are supported to find out how they can link with an individual or community group, then the support is adapted and/or provided as required to make this happen.

Thinking outside the box

Key questions are, “what other ways might an individual participate or contribute?” or “in what ways can we enable new ideas?” Looking at possibilities that incorporate interests and the skills of individuals is often a starting point. Organisations who commit to exploring how to operate a facilitation based approach will often be pleasantly shocked at the openness and generosity found in their community. Unimagined possibilities come to life when people connect with people.

ADDITIONAL IDEAS FOR ESTABLISHING A SHARED FRAME OF REFERENCE

Previous research SAMS has been involved in, “Effective Practice in Community Participation Services: A New Zealand Experience” (<http://www.tuhana.org.nz/images/effective.pdf>), has highlighted the following approaches as being key aspects of effectively assisting an individualised community based approach:

Element	How this is done?	Practical Examples
1. Develop a trusting relationship	- “make the time” to learn about an individual’s preferences, strengths and goals	- engage in casual conversation and “no pressure” initial contact
	- become familiar with an individual’s natural supports (family/whānau and friends)	- aspiration based personal planning
	- ensure that the individual moves at their own pace	- create ongoing opportunities for each individual to engage
	- respect people’s space	- acknowledge and accentuate what the person “can” do
2. Structure opportunities for people to succeed	- respect each other's opinions and personal values – we don’t always have to agree but we can show respect.	
	- expose individuals to lots of different opportunities and experiences – then find out what interests/excites people.	- watch for what excites people then encourage them to do it for themselves/for others
	- give people things to do that they can be successful with -	- pay enough attention to what people are doing so

	then encourage them to choose what they will do	that you can describe/reflect progress/achievement
	- break big things down into smaller steps and identify who will do what	- regularly recognise and celebrate with groups in a tangible and valued way, eg, special morning tea.
	- encourage/acknowledge	
	- highlight peer achievements	
3. Aim to have people “take more control”	- encourage participation by sharing responsibilities	- clarity about “staff” purpose, ie, facilitator = I am only here to make it easier for you to do what you want to do – not do it for you
	- when a trusting relationship has been developed, deliberately shift responsibility, ie, you want it = you do it	
	- atmosphere characterised by a mix of respect and mutual “joking”, ie, not “therapeutic” but fun!	- create task sheets and document who is doing what and the time frames
	- staff awareness of “power and control” dynamics”	- use strengths-based / empowering language, eg, “It’s your responsibility.”, “You do it.”, “What has that taught you?”
4. Be a “facilitator”	- know what is “out there”	- gather accurate and current information about community resources
	- link individuals/groups with the right person/activity/group in the community (not duplicating/replicating or creating a “special” version)	- “match” people to each other
	- reflective practice, ie, What did you learn from that?, What can we do differently next time?	- observe and “feel” individuals energy and interest levels ... be flexible and keep it fun.
	- adapt approaches and activities for each individual and situation	

5. Clear vision and purpose

- negotiate on an ongoing basis
- strong values base
- constantly asking 'Why are we here?' and "What is our purpose?"
- affirm key values, eg, self-determination, learning, inclusion and *innovation*
- driven from the "bottom up", eg, external facilitation of service user and family input into strategic plan
- ensuring service provision is based on personal goals and aspirations in meaningful and demonstrable ways
- values always inform/guide decision making and service objectives and outcomes
- cultivate (and keep) an "open mind".

6. Strong leadership

- leadership style needs to embody values
- meaningful conversations with people
- engaging people and bringing them together
- listen
- be flexible: constantly changing and adapting to meet needs
- encourage staff to be passionate and professional
- shape roles according to staff member's skills, interests, strengths

		<ul style="list-style-type: none"> - regular reflection - time to reflect and review, set team goals, involve everyone, ask them what they think and so everyone is invested in outcomes - external supervision - emphasis on targeted staff training - change organisational structure to make best use of staff resource, eg, one day per week is “non-scheduled”.
7. Find out what people want	<ul style="list-style-type: none"> - casual conversation and observation are the key 	<ul style="list-style-type: none"> - spend three months where the person gets used to the organisation and what is on offer before doing an individual plan. People are then clearer about their options - involve and engage with important people in an individual's life.
8. Individualised service delivery	<ul style="list-style-type: none"> - ask the person what they would like - before they interact with “service” options 	<ul style="list-style-type: none"> - nothing is set in stone - all staff engage with people – not just key worker – conversations important - constant reviews of individual plans – formal and documented - individual plans contribute to the organisation’s strategic planning process

		<ul style="list-style-type: none"> - quality comes from the conversational, informal discussions – - know the person - value people, look for opportunities, be open-minded - support worker is ‘interpreter’ – be creative about gathering information - non-scheduled’ time - networking, one-on-one.
9. Partnerships	<ul style="list-style-type: none"> - working collaboratively - constantly looking for opportunities outside of disability sector – focus on community 	<ul style="list-style-type: none"> - create opportunities for people to have meaningful connections - get to know the right people - know what’s available in the community and use it – don’t reinvent wheel - be clear about outcomes – ‘enjoyment’ is a relevant outcome - constant communication – checking in.
10. Broker role	<ul style="list-style-type: none"> - linking people in to community opportunities - “flexible” support hours - assist people to “joining the dots” 	<ul style="list-style-type: none"> - process for person engaging with community may start in-house – small steps - “moving people along the continuum” (building on success). - No Exceptions Action Plan

		<ul style="list-style-type: none"> - know it's going to be hard work - a journey - broker helps create opportunity but person has to be active in making it happen. "I will do this, and you need to do this" - pre-planning, 'no surprises' - finding right person in right organisation to work with.
11. "Interpreter" role	<ul style="list-style-type: none"> - paying close attention to what individuals are expressing, <i>through actions, reactions and discussions</i> 	<ul style="list-style-type: none"> - gather information-interpret-act-adapt - occurs on a formal and informal basis.
12. Develop good relationships in community	<ul style="list-style-type: none"> - location – right in the middle of things - network - help people with the change process - ensure trusting relationships with families 	<ul style="list-style-type: none"> - problem-solve through networking - building up connections in community – creates momentum, one thing leads to another - recognise some people have never been given the opportunity to do things differently - familiarise people with concept of change - show each individual what it will mean for them and provide individualised support

		<ul style="list-style-type: none"> - trusting relationships help - take time - recognise that families can be cautious and work with them – reassure and build up trust - take little steps. Peer success and watching others has helped.
13. Developing staff capacity	<ul style="list-style-type: none"> - training ethos – individualised personal and professional development opportunities linked to performance appraisal process - staff encouraged to excel - encourage initiative - learn from mistakes 	<ul style="list-style-type: none"> - staff encouraged to challenge for improvement and build on skill base - staff take ownership of service (not management) – encouraging staff to excel - staff provided with practical tools/ techniques required to do the job.
14. Preserving and promoting philosophy and culture of organisation	<ul style="list-style-type: none"> - philosophy of individual/ family/whānau/collective wellbeing and development - culture of mutual respect, empowerment, and self-determination - good board-management relationships based on trust and clear vision and direction - management team and staff empowered to be innovative - consistency of culture across organisation 	<ul style="list-style-type: none"> - shared strategic planning with management and board - tapping into personal/community connections to obtain or access resources - all innovations filtered through Quality Framework - reference/leadership group in place to provide guidance.



Equip People to be Effective

Embarking on a process of fundamental change can create a wide array of responses. People can experience a mix of emotions that range from excitement and optimism through to fear and anger. People can question the validity of what they have previously been doing or be sceptical about the outcomes likely as a result of proposed changes. Some people will just decide not to change! A central challenge for organisations is to ensure staff have the knowledge and skills to implement new approaches.

Human Service organisations in New Zealand have faltered, in their change journey, as a result of generally describing to staff what could/should happen, without equipping them with the practical techniques associated with how this can be achieved. The results of this can be seen in behaviour like:

- renaming current practice (as if it is a new approach)
- prolonged periods of introspection and/or controversy
- changing tack on a regular basis (constantly looking for a new answer)
- importing or imposing models and approaches that don't result in improved outcomes.

Alternatively, services can waste precious resource and time by purchasing or providing training to staff that has minimal positive effect. This type of training tends to:

- contain generic material
- be delivered in a standardised manner
- be potentially incongruent (or disconnected) with the wider objectives of the desired change
- be presented by people unfamiliar with the sector and/or the practical application of approaches.

SAMS experience strongly indicates it is desirable to establish a high level of connectedness in the change process. This is achieved when a staff education process (ie, equipping) is closely aligned to:

- the existing strengths of the organisation (evaluation)
- the vision the service has
- an explicit values/principles base

- a frame of reference understood by all involved
- a tangible approach to supporting the actioning of new skills (mentoring and/or coaching).

We suggest services consider the following four aspects when equipping staff.

Staff development has:

1. A clear purpose

There is an obvious link between the desired objectives of the change process and the skills being promoted.

2. Customised content

The material presented to staff has been tailored to their specific and current strengths, challenges and aspirations.

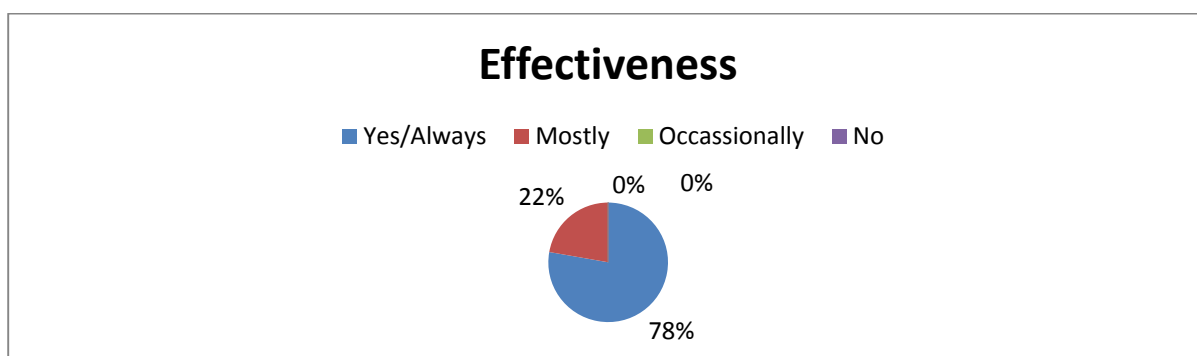
3. Credible facilitators

The people delivering staff education have relevant expertise, can demonstrate (or at least illustrate) the techniques being taught and they are able to develop the trust of participants.

4. A constructive culture

The learning environment is 'safe', positive and inclusive. There is a focus on creating new ways of doing things – not compliance to a changed approach.

An example of increasing effectiveness - combining evaluation and customised staff education



During 2009, 2010 and 2011, SAMS (Standards and Monitoring Services) trialled an approach that combined Developmental Evaluation with customised training.

This involved thirteen services that are spread throughout New Zealand. All services (13 in total) reported the combination of developmental evaluation and customised training (this includes mentoring) assisted positive development. 78% gave the highest rating for this and 22% reported the approach was “mostly” effective. One of the services that reported “mostly” considered it would take longer to determine the

real impact of the linking of developmental evaluation and customised staff development.

Clues to an effective focus for staff education

SAMS work with the 'SkillWise' service (2011-2014) has highlighted the practical skills they experienced as the most useful in equipping them to effectively move to an individualised, community focused approach.

The following "list" describes some of the topics found useful when moving towards a community focused facilitation based approach:

Skills for a new era

Networking and connecting

Identifying and utilising current networks of staff, families/whānau and colleagues, eg, developing asset registers.

Knowing how to "introduce" people

- For the individual – what skills, information, prompts (eg, how to take turns in a conversation, what to say, what not to say, etc).
- For the "others" – being a positive role model, affirm positive interactions and responses.
- Be prepared to practise, give prompts to assist all involved (eg, "Why don't you tell X about your last fishing trip").
- Assisting others to be "at ease" with the individual.

Encouraging people to see past "disability" and connect with the person on the basis of their interests, talents, merits.

Developing new networks

- Finding and linking with community resources – strengthening previously made contacts.
- Good experiences with previous support workers enables easier linkages with next support worker.

Community Mapping

Planning and organisational skills for networking including maintaining confidence and persevering.

"It's opened up networking; I have conversations with people and there's a lot more intention there."

Developing Partnerships

Besides the individual, partners may include family/whānau, other providers, community groups, employers and interested/involved individuals.

Information sharing.

- Discussing and sharing “Utopia” (the service transformation approach) process with family/whānau.
- Providing “Utopia” handout to other providers’ staff and inviting SAMS staff to talk about “Utopia” Project to other providers.

Education by gentle example

- Re-framing or re-directing negative suggestions/ideas.
- Checking in - home visits, phone calls, regular emails, keeping key players “in the loop”.
- Understanding “collaboration” – interpersonal communication, personal boundaries and constructively using conflict.
- Being a good listener and able to initially “give” more in order to create and/or open pathways.
- Ability to give and receive constructive feedback.

Belonging

Assisting individuals to become “members”/contributors of groups.

Assisting individuals to develop relationships with others.

Providing relevant information/support around expectations of belonging (eg, greetings, morning teas, being on time, taking breaks, etc).

Supporting individuals in ways that assist them to communicate and be understood.

Individuals identifying themselves as people with multiple activities, friends, and plans for the future.

Personal Planning

Ensuring this process is of benefit to the individual.

Use a broad range of development tools.

Constructively utilising information and the interest of family, friends and other providers.

Asking how can we support you to have a good life?

“..customising training from developmental outcomes has been very effective. Staff are putting what they learned into practice, there has been a marked shift in attitude that is more positive, person focused rather than creating barriers. Staff thinking is now much more expansive than previously.”

Service Manager

General Staff Education Topics Identified as Useful

Note: these topics are included in the Enabling Good Lives (EGL) Guidelines resource for organisations.

- Who Has the ‘Say So’
- Deciding What I Want
- Making it Easier for Individuals to Communicate
- Building Trusting Relationships
- Building Partnerships
- Having People Involved
- Experiencing New Things
- Citizenship
- What’s in My Community
- Facilitation Based Approaches
- Interpersonal Communication
- Group Facilitation
- Innovative Resource Allocation
- Working Creatively with Conflict
- Making Use of the Resources We Have.

Exploring significant role change

Moving to a Facilitation Based Approach

When working with several organisations embarking on significant change, SAMS has noted value in reframing and renaming the role that paid staff have in people's lives.

Renaming a role can open the door to people exploring new ways of doing things – without minimising what they have been doing. SAMS has found it useful to describe this transformation of roles as the move from “service provision” to “facilitation”, ie, shifting from attempting to provide what is perceived as what people want, to making it easier for people to create a good life for themselves.

In order to explore this change, it is desirable to review and challenge our current views of support, service and specifically the process and skills involved in **facilitation**.

In this context, “to facilitate” means to **make easy**:

- Make possible
- Smooth the progress of
- Help
- Aid
- Assist
- Speed up.

We typically think of facilitation as part of a group process – eg, facilitating a meeting, etc. But it can also be part of a one on one relationship.

Maria Montessori, the famous educator, preferred the term “facilitator” to teacher.

She (Maria Montessori) said, “primarily, the purpose and vision of the Montessori facilitator is to provide an environment where the inner abilities can unfold spontaneously, encourage the development of the person within and allow them to achieve their greatest potential.”

This is a very interesting perspective for any of us in the role of facilitator as it incorporates both action and values. Identification of both values that affect us and how that impacts on our actions, especially when we are acting on behalf of someone else, are an integral part of the facilitation process.

When working with groups of service staff, SAMS has identified seven core competencies for “facilitators” in the human services. These skills are summarised as:

Communication Skills

- Creating safe environments
- Open questions
- Perception checking
- Positive reframing

Conflict Management

- Win/win concepts and practices

Networking

- Local knowledge
- Developing relationships, ie, family/whānau, generic resources and allied social/human services

Strategic Planning

- Environmental analysis
- Task analysis
- Asset development

Matchmaking

Cultural Competency

Optimism

- Developing connections
- Informed and respectful ways of working
- Strengthens Based practice.

Over the history of “disability” services, there have been many roles assumed by “paid” workers and human services. Essentially, as people have become more aware of the impact of these “roles”, the roles have become less controlling.

Significant Control	Partnership
Custodian – Surrogate Family – Medical Therapist - Provider - Educator – Supporter - Facilitator	

The main focus of a “facilitator” is to work with an individual and their family/whānau to make it “easier” for them to achieve a good life. The individual and their family/whānau are enabled to lead the process and the “community” is seen as a resource (not a place that individuals are separated or excluded from).

The intention of the “facilitator” role is to ensure:

- natural supports/networks are acknowledged and strengthened
- “paid” support makes life “easier” for individuals and family/whānau
- community resources are able to be effectively accessed by all citizens
- services are not trapped or tricked into “providing” something that can be accessed through family/whānau and the wider community
- resources are co-ordinated
- individuals and family/whānau have maximum control of supports and services
- supports and services are driven by the preferences and aspirations of individuals and family/whānau.

Effective Facilitation in a New Zealand Context

While there is a considerable quantity of valuable information that organisations in New Zealand can access internationally, SAMS has discovered support staff respond well to considering the specific characteristics that can make this role effective in New Zealand. We acknowledge New Zealand is growing in cultural diversity, but also have observed groups of staff “come to life” when we explore approaches based on a ‘kiwi’ way of looking at things and doing things.

Areas SAMS has found useful to examine include:

- **Mana Enhancing**

The way the facilitator interacts with people enables them to develop/maintain dignity and be/remain strong (even if people have different perspectives!).

- **Casual** (not formal)

Facilitators approach things in a relaxed and flexible manner.

- **Reading Clues**

The facilitator pays close attention to subtle detail.

- **Fairness**

Equity is obvious.

- **Innovation**

The facilitator appeals to people to develop new ways of approaching things.

- **Trust via 'instinct' + evidence + relationship** (not role/position)

Developing trusting and mutual relationships is a priority task.

- **Credibility**

Building Credibility

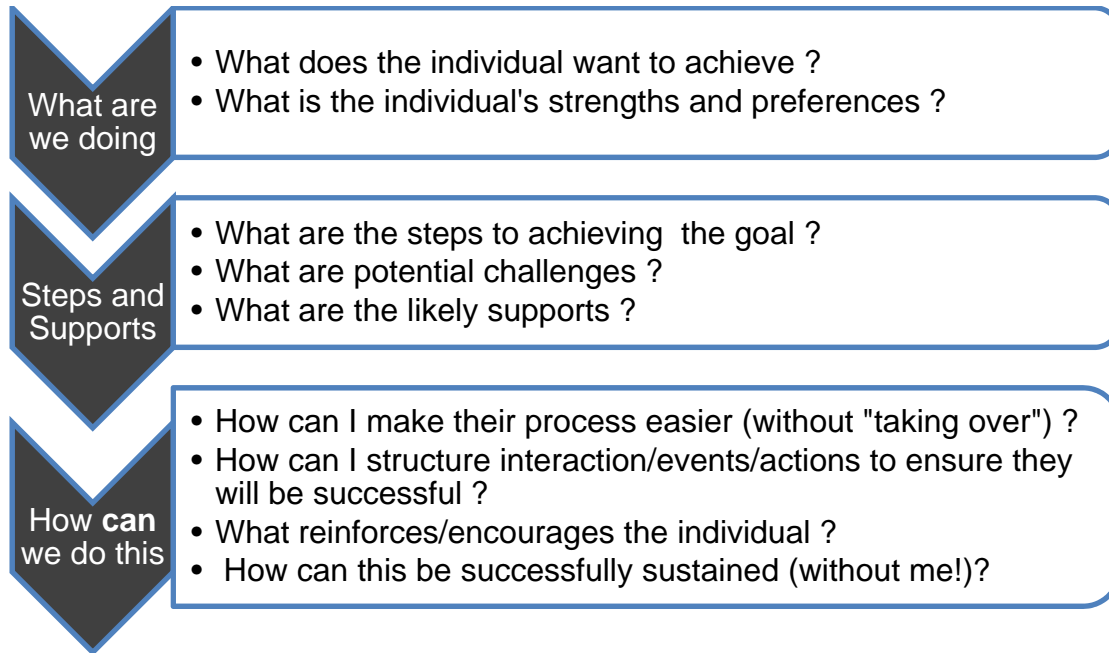
Adapted from Power, Influence and Persuasion, Harvard Business Essentials

“Credibility = Trust + Expertise”

“Your own credibility manifests itself on two levels:

- **Your ideas.** For you to be credible, your ideas must be perceived as sound.
- **You as a person.** Other people must view you as believable, trustworthy and sincere.”

Some key questions for a facilitator

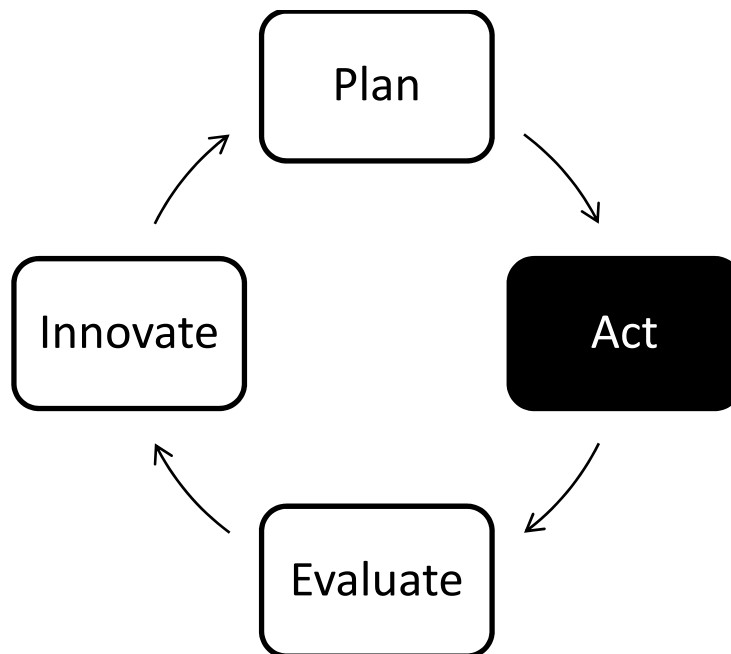


Some key facilitator behaviours

- Paying attention – looking for “clues”
- Linking people
- Structuring success
- Getting “out of the way”.

Demonstrate the New Way

Mentoring – demonstrating the “how to”



A significant difference has been noted between organisations who simply invest in staff education and organisations that actually enable staff to experience what new approaches actually look and feel like in practice.

Our experience indicates the value in staff education is the provision of new frameworks, language and ideas. But, on its own, it often falls short of being a single effective catalyst for sustained change in behaviour. However, when group staff education is combined with people being shown “how” the approach/skill is applied in real time, the chance that ‘transformation’ occurs is increased.

The most effective approach SAMS has experienced is when all staff attend ‘training’ sessions, and a small group of staff are then selected to experience the ideas in action. These staff get a first-hand experience of the achievements (and potential challenges) possible with the new approaches.

As this sub-group of staff are supported to experience “how it is done”, there is a burst of interest and enthusiasm amongst colleagues. The ideas explored “in training” are no longer elusive, idealistic or impractical but there is local evidence of how they can be successfully applied.

In several projects SAMS has noted two things:

- Suspicious or cautious staff achieve more than they anticipated possible when skilled “educators” work alongside them to demonstrate how approaches are applied. It is common for these staff to report “I wasn’t sure how it could work ... but, now I get it!”
- Staff who gain the direct experience of the benefits in working in a new way become the mentors for colleagues. Clearly, this reduces or eliminates any need for the organisation to “contract in” people with expertise in these areas.

Things to consider when applying a mentoring approach

It has become a key role of SAMS staff, involved in transformation projects, to mentor and guide staff as they endeavour to learn the practical application of a facilitation based approach.

Often, mentoring, in this situation, was described as developing a relationship that promotes reflection, learning and insight.

Key aspects of the mentoring process included:

a. Further development of shared vision and commitment

Critical to the development of individualised support is the requirement of all involved to share the vision and be committed to the process of supporting one person at a time. Discussing and dealing with the issues of change that arose from this style of support ensured that those involved work together towards a better future for all. Sharing the vision enabled and promotes a change process that moves from “group support” to one of truly customised support.

b. Recognition of existing skills of staff

Acknowledgement of the person’s previous experiences, learning and commitment to those being supported was appreciated and understood as another foundation for on-going development. This was not about “older/wiser” guiding “younger/aspiring” but rather a more egalitarian process that appreciated and recognised the skills and attributes that all parties bring to the process.

c. Importance of building relationships

The relationship between those involved in the mentoring process was a foundation to further development. Good mentoring promoted the development of healthy relationships that mirrored the process of facilitation based support. Through mentoring, a synergetic relationship develops that enables those involved to set and achieve goals, make decisions and solve problems.

d. Flexibility

Mentoring can be formal, informal, one-to-one, and in small group. All of these approaches have value – emphasising the importance of being flexible and utilising appropriate processes as needed.

e. Satisfaction

Mentoring has typically been regarded as enriching and satisfying for all involved. Mentoring factors in time to reflect on success and enjoy it!

Methods that can be successfully used in the mentoring process can include:

Coffee and Chats

The process of “getting to know” a person by doing typical things together, such as going out for a coffee and a chat, was reported by staff, to be one of the most significant change factors for them. Typical activities enabled a more relaxed atmosphere, which promoted more positive and trusting relationships and a sense of mutuality. This in turn, led to individuals experiencing more confidence about exploring a wider range of options. For many staff, this process was far more useful and respectful, than the well-intended but often standardised planning or discussion approaches.

E-mailing

This form of communication was used to document any agreements, plans, ideas that had been discussed. It ensured that there was regular feedback and information and promoted an easy and informal method of discussion and communication between the mentor and the staff person.

“Assignments”

For some individuals and staff, “assignments” provided a focus for discussion and discovery. Some examples might be to discuss and discover the people in someone’s life and who they enjoy spending time with. Having a focal point often led to other information that would be of benefit to the individual.

Walking Alongside

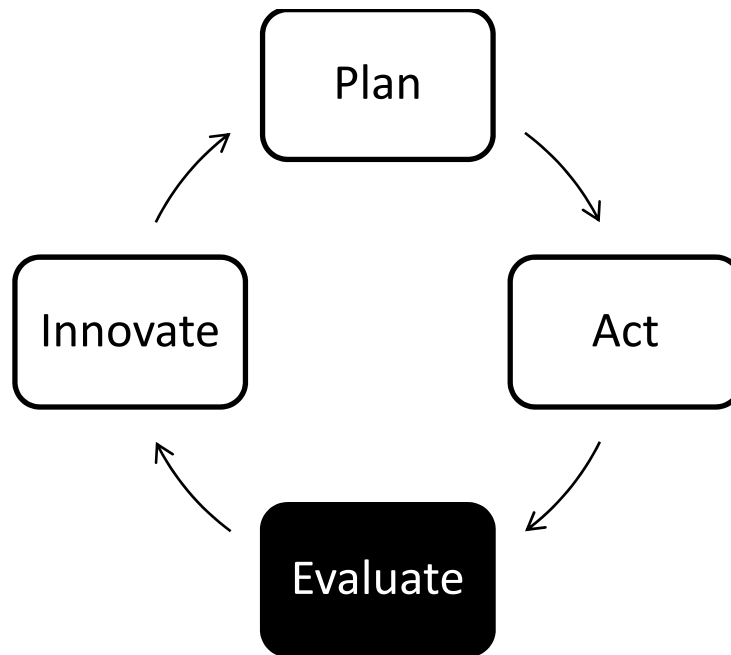
Often the mentor would participate in the initial activities such as “community mapping” or using “talking mats” as a way of providing guidance and support to the staff person. This also enabled the mentor to role model social interactions, note new ideas and in general provide encouragement and feedback for learning.

Facilitating Wider Forums

SAMS staff have also found it useful to include occasional wider staff learning and development forums and regular feedback meetings where everyone can share experiences and obtain more detailed information on specific techniques. For example, Guidance questions for development of personal plans, Talking Mats™, Circles of Support, Community Mapping and Tasters.

Note: Further information about these tools can be found in Appendix 1.

Reflection



SAMS believes the key people to provide information on the effectiveness of a service change process are the disabled people and families that interact with the service. We believe it is also desirable for disabled people and families to be central in the design and facilitation of this process of reflection.

Ultimately, the only solid indicator of successful positive change is that the people who use the service report that change has enabled them to more easily create (experience) better lives.

Rather than reflection being a place to determine “have we been successful (or not)?”, it can be an opportunity to refine approaches and consolidate learning.

How ‘reflection’ is framed can have a big impact on the types of information people will share.

If ‘reflection’ is framed as a routine part of day to day practice and a regular component of development, it appears more likely that people will feel safe to more fully express their experiences. Creating an environment that is perceived as “safe” invites people to explore, in-depth, their experiences.

Creating a “safe” environment can be achieved in a number of ways. These include:

- using an external facilitator to run meetings
- setting up gatherings that are peer facilitated
- having multiple ways for people to contribute information
- identifying individuals and organisations who are “trusted” and seen as credible to have key roles in the reflection process
- ensure opportunities for ‘reflection’ are regular (some people will watch and see if it is a ‘safe’ process before they choose to become involved)
- invite people to contribute opinions (rather than request that people respond to a predetermined and/or standardised set of closed questions)
- be very clear, and demonstrate, that all perspectives will be actively respected
- frame the ‘reflection’ process as an opportunity to learn (not a judgement of success).

The next thing many people attempt to determine, before they contribute their opinions, is whether their ideas will be valued. In this instance, valued is a very active process. Many potential contributors do not just want their views “heard”, they want to know that expressing their opinions will “make a difference”. In this era where many appear time poor, potential contributors will often want to believe that this is a chance to have meaningful input that will be reflected in the future actions of the service - before they invest time and energy in a ‘reflection’ process.

A Multi-Perspective Approach

SAMS advocates the benefit in a ‘reflection’ approach that not only gathers individual views, but looks for common themes within defined groups. Rather than attempting to determine ‘who has the right view?’, this approach recognises that different people (and groups) are likely to experience change in a variety of differing ways.

In its most basic form, organisations would create forums or opportunities where things can be looked at from different viewpoints, eg, disabled persons, families, direct support staff, management and allied community networks. This approach may create added “safety” for participants and is intended to be established where there are achievements or challenges that may not be apparent when looking from a single perspective.

Typically, reflection enables participants to identify what could be:

- Affirmed**
 - strengthened, celebrated or acknowledged. In a change process, this may include recording or fully describing “what went well”, how this happened and why this may have been. This may become important information when comparing “what worked for who” and prioritising where the services invests further
- Adapted**
 - approaches that need to be changed, refined or replaced
- Created**
 - what new things are required

Central to this approach is the belief that no individual (group) has the right (or ability) to represent an opinion on someone else’s experience. Equally, there is no single way of determining the effectiveness of a change process – there are simply different views that need to be considered.

This type of ‘reflection’ approach can create differences of opinion or conflict. This may signal that positive change – particularly the shifting of authority – is beginning. A time of celebration!

Note: See the next section.



Working Constructively with Conflict

SAMS experience indicates that fundamental change is unlikely to occur without conflict.

Potentially, an absence of conflict may signal substantial developments are not occurring!

Conflict plays a regular and pivotal role within the human services. Conflict can be the place where positions are clarified, perspectives are shared and new directions are established. Unfortunately, conflict can also be the place where unnecessary things occur, eg, people can feel victimised, allies can become enemies and precious resources can be eroded.

There are two things organisations may want to consider when embarking on a process of transformation:

- The framing of “conflict” as an essential and constructive element of change.
- Ensuring that there are key people in the organisation that have both “comfort” with conflict and “competency” in approaches that maximise the chance that conflict becomes creative.

What we think (and feel) about conflict and the skills we have learned will be the most significant factor in determining whether conflict becomes a place of creativity, diversion or destruction.

Partnership and clarity both rely on occasional conflict occurring. Genuine partnerships need conflict so that the individual views of the parties remain distinct. When each perspective is valued then there is strength and integrity when the parties/people choose to work co-operatively.

Within organisations, there are very distinct parties (groups), eg, funders, managers, disabled people, families, employees. Each group, or even individual, has differing expectations and aspirations. These differing views will create conflict. The challenge for human service staff is “how to ensure conflict is constructive”. Constructive conflict is when all of the perspectives are valued and a mutually beneficial resolution is sought.

Why does conflict happen?

Conflict occurs as a way for individuals and groups to attempt to influence or achieve what they want.

This may be to be more understood or to have things more the way they think they should be. The conflict only tends to become messy when there are other elements introduced to this, for example:

Fear	that a change will result in less than what people already have
Mistrust	things are not as they appear
Misunderstanding	different ideas about what was meant/intended
Control issues	one of the individuals/groups is attempting to regulate or dominate what is happening
Unwillingness	a person/party is closed to input from others or will not even consider altering their behaviour/practices
Habit	where an individual/group is so used to fighting for what they believe in that permanent conflict is created
Transference	one of the parties is shifting emotions and responses from one situation to another (without realising it).

Potentially unnecessary conflict can appear inevitable in a change process if there is a situation where there are:

- mixed expectations
- unclear communication
- stress
- a reactive culture present (in an individual or group).

In a transformation process, appropriate and necessary conflict is likely to occur when:

- clarification is required
- change or growth is happening
- groups or individuals have different agendas and they are attempting to work together
- progress is reviewed and feedback given.

Why conflict exists in human services

Apart from the usual conflicts, as a result of “being human” and needing some degree of conflict in order to retain autonomy and identity, conflict is common in a range of human services because:

- **People are increasing their self-determination**

It is common for individuals to seek to define and refine who they are through conflict. As people gain more confidence and assertiveness, it is only natural that support staff, organisations and families are challenged. Rather than signalling “organisational failure”, this type of conflict indicates success, ie, individuals have developed a voice and feel safe to express their opinion – even if it is different from expectations.

- **Change**

The whole purpose of many human services is about creating and supporting positive change. With the change process comes conflict, as there is a constant need for individuals/groups to clarify what is happening and where they fit in.

- **Limited resource**

There is conscious (and covert) competition for attention, time, influence and resource. Even if all of the parties (groups) involved with an organisation are in complete agreement about what the organisation is doing, and how they are doing it, conflict is still likely to occur as individuals/groups try to ensure their needs are met.

Conflict - A Catalyst For Positive Growth

Definition

Conflict is often about “struggle”, “collision” or “clashing”.

Often, in the human services, conflict occurs when we have different views about the same situation. This comes from having differing values, experiences and expectations.

Knowing how to work constructively with conflict is one of the practical ways to bring life to concepts like “diversity” and “respect”.

Managing Conflict

Conflict can be a healthy and powerful medium for learning and development.

Left unmanaged conflict can become confusing, messy and destructive. Managing conflict enables people to learn new skills in a safe and constructive environment while increasing the chances that an acceptable, or even beneficial, resolution can be reached for all involved.

It is natural for individuals or groups to see the world differently. Everybody carries their own perspective of a situation. For this reason conflict is both natural and predictable. What is less certain is what skills individuals have in ensuring that conflict is creative and constructive. Managing conflict enables safety to be maintained and skills to be developed.

Until a person has experienced effective conflict management they may not have been exposed to HOW to work creatively with conflict.

Some core principles of working in (and through) conflict to consider:

- Everyone is entitled to their perspective.
- Processes must create equity.
- Respect is an active (not passive) state.
- Management in an organisation is responsible for ensuring conflict is safe and constructive.
- Effective resolution is only possible when all parties have a willingness to clarify and resolve issues.
- There can be unity in diversity.

Approaches to managing conflict

If the parties involved have goodwill and the intention to be constructive, facilitation is all that may be required.

1. NEGOTIATION - the parties acknowledge that there are differences and consciously work together to clarify perspectives, find places of understanding and agreement, and ensure that they develop a way to work together that is mutually beneficial.

2. FACILITATION - making it easier for people to describe what is going on for them and ways to find the next constructive step forward. This can involve, at the beginning of a group's exposure to conflict, a facilitator rigidly applying a framework that provides a "formula" for safety, direction and expression.

3. MEDIATION - bringing in a “third person” (often an external person with a high degree of ‘credibility’) to bring more structure to the discussion and process. Mediation does not involve the mediator making decisions about what an outcome should be.

4. ARBITRATION - involving a “third person” who can listen to all of the points of view, then make a decision about the next steps.

Applying negotiation skills

Definition - negotiation

“Confer with another view to compromise or agreement. To arrange or bring about a desired object.” Concise Oxford Dictionary, 1969

“Effective negotiation is unifying two peoples (groups) ideas.” Nancy Highshoe, 1997

Successful negotiation is “following a few common sense rules to reduce conflict and turn it into co-operation and reach solutions that really work for all the participants.” The Negotiation Skills Company, 1994

Various strategies in conflict

Control	trying to manage all possibilities to attempt to get what you want
Submit	giving in or giving over to another person’s position
Compromise	a process for settling for what appears to be fair and reasonable.

Negotiate

The process of clarifying expectations, aspirations and possible outcomes with the intention of both parties potentially achieving what they want.

When is negotiation appropriate?

When you need to work something out with another person (group) and there is the potential for conflict. It is sometimes wise to “negotiate” when approaching a person (group) in order to obtain something new or different.

Am I ready to negotiate?

- Do I:
- know what I want?
 - know why I want it?
 - feel ok about working co-operatively?
 - think I am able to listen to the other point of view?
 - have some ideas/strategies?
 - have a back-up if the negotiation is unsuccessful?

Some key points

- **Look for common ground.** How your needs and the needs of the other party can be met.
- **Manage the process** not the content, eg, making sure everyone is heard, looking for what can be (not what isn't!).
- **Be flexible** and creative – this may mean new options can be discovered.
- **Remember that the objective** of negotiation is to maintain, or improve, your relationship and reach a mutually acceptable outcome.
- **Keep your integrity.** Be honest about thoughts, feelings and facts.

Ten common causes of conflict within a human services organisation

If there is recurring conflict within your organisation as you attempt change, there may be benefit in assessing whether any of the following causes are present.

1. Unclear purpose and objectives

- a. Is there a clear statement about how the organisation wants to operate in the transformation process?
- b. Is everyone aware of the values held by the organisation, and how these are expected to be seen in practice?
- c. Have objectives and goals been developed and reviewed by the current group of people?
- d. Is there obvious advantage to the change happening ?

2. Unclear expectations

- a. Are people clear about their areas of responsibility, what tasks people have, communication channels and accountability?
- b. Do the tasks fairly reflect the time/resources made available?
- c. Have people been supported to gain the basic skills needed to meet expectations?
- d. Is performance monitored in a regular and constructive manner?

3. Communication

- a. Does everyone get information in a clear and timely manner?
- b. Are feedback processes known and understood?
- c. Is there opportunity for people to have input into decisions that affect them?
- d. Is there time given to recognise achievement?

4. Personal skills

- a. Have people been given the opportunity to develop good listening and expression skills?
- b. Have managers in the organisation had the opportunity to develop skills in time management, delegation, instruction giving and facilitation?
- c. Is conflict/difference of opinion valued?
- d. Is constructive feedback given and received as a matter of course?

5 Cohesion

- a. Do people have the regular opportunity to discuss issues together?
- b. Does everyone know what each other are doing?
- c. Do the organisation's procedures and practices match their mission statement?

6. Conflict of interest

- a. Do people's motivations and skill level match their role or position?
- b. Are all processes transparent, ie, open for scrutiny

7. Personality differences

- a. Are individuals encouraged to contribute to the organisation in ways that reflect what they have to offer?
- b. Is difference viewed as a strength or problem?
- c. Are the less "verbal" members of staff encouraged to state their opinions?

8. Leadership

- a. Do those in leadership roles use this position to ensure clarity, co-operation and team cohesion?
- b. Is the contribution of everyone sought?
- c. Do managers model effective communication, facilitation and conflict management?
- d. Are emerging leaders identified and supported?

9. Power balance

- a. Are people valued regardless of their role in the organisation?
- b. Are there ways for all stakeholders to have their views equitably represented in some forums?
- c. Are the practices of the agency adapted to reflect feedback?
- d. Do people know where they can receive support?

10 Unresolved conflict

- a. Do people leave meetings with clarity and the sense that their view has been heard (though not always agreed with!)?
- b. Do managers regularly check to see if there are issues that need to be addressed?
- c. Is everyone aware of how conflict is resolved within the organisation?
- d. Can people from outside the organisation be used to facilitate or mediate if conflict is not resolved in a timely or appropriate manner?

In a transformation process conflict is pivotal. Conflict can provide the energy, direction and “testing” to ensure the change process is solid.



Summary

The process of “transformation” tends to take most of us to the edge of our comfortable places – and then beyond.

By definition, exploring new ways of thinking and being involves significant change.

Central to the “transformation” suggested in this resource is an appreciation that these altered approaches can create positive change for individuals, families and communities.

Rather than framing “transformation” as a purely mechanical adjustment to how an organisation operates, SAMS suggests the process is considerably more organic. Altering how people interact with people takes us into a territory of interconnectedness. As the change unfolds, the outcomes of the change process are dynamic and unpredictable.

This resource offers practical approaches, based on our experience, that make this change process more likely and more effective. Each organisation will need to adapt as they progress. At each stage of the journey reflection is required.

SAMS strongly advocates that organisations watch closely to ensure the direct experience of disabled people and their families is being enhanced by change.

Gathering stories – person by person and family by family - will give organisations clues as to whether they are “on-track” (or not). Each “story” will alert us to things that may be useful for others or challenges that may require us to develop new strategies. Directions and approaches can be “fluid”. Moving towards a ‘personalised approach’ necessitates this!

Transformation from being a “service provider” - that administers to a group identified as “different” - to supporting individuals based on their interests, skills and aspirations can be achieved. Making it easier for people to become connected and contributing citizens is possible.

This resource has identified there may be key factors to success.

These key elements include:

- a belief that transformation must happen
- valuing individuals and the choices they make

- starting with one person at a time to develop and inform processes and practices
- on-going clear and constructive communication with all of the people involved
- cultivating and embracing an attitude and approach that is always searching for “what might work best for this individual in this situation”
- reflection and review (formal and informal)
- recognising challenges as opportunities.

We live at a point in history where within the span of a few generations we have seen great advances in the kinds of lives that are possible within communities for persons in sectors as diverse as mental health disability, aging, children, service to minorities etc. This is not an illusion, as much of this progress has been real and has often been achieved with great difficulty. Nonetheless, we can also say that satisfaction with such gains is tempered by the realization that the lives of many people still fall short of what their fellow citizens routinely enjoy by way of lifestyles that suit them and access to the core benefits of being within community. The ongoing interest in agency transformation is an extension of the recognition and concern that we are still not where we want to be in terms of optimizing the actual life possibilities of people.
Michael J. Kendrick, 2011

Appendix 1 – Specific Tools for Individualised Support

One person at a time

Stage 1 – Invite an individual to participate with you in this process.

Work with your team to identify a regular timeframe for you to have one hour a week (you can do more if that works!) with the person where you do not have other responsibilities.

This stage is about getting to know the person better and identifying, with them, their likes, dislikes, preferences, dreams etc. It is also a chance to find out about their communities.

Do a community map, circles of support, etc. You should have more information and maybe some “tasters” to try out or some new connections.

Stage 2 – Start trying things out and making connections.

You might want to utilise your staff asset register/network.

Provide support and be a good role model for any introductions to new people, places or activities.

Stage 3 – Maintain and monitor connections and new activities.

Fade out as appropriate but keep a ‘watching brief’.

Stage 4 – Start with another individual.....!!!

Asking Questions and Getting to Know the Person

- **Does the person’s life (and plan) have the following?**
 - Is there increased choice?
 - Is there decreased dependence on the service and/or support staff?
 - Is there increased time in ‘community settings’?
 - Is there noticeable respectful interaction?
 - Is there increased self-confidence?
 - Is there increased achievement?
 - Is there increased contribution?
 - Are new relationships developed and/or current ones strengthened?

What do I do during the week?	What do I want to do?	What new things did I try?

Who (or what) do I love ?	What roles do I have?	What do I look forward to?

You can use visuals, photos or real objects to help asking these questions.

You can think of other ways to re-state the questions too. For example, you might assist the person to recognise that they are a sibling, a loyal friend, are always on time at work, etc instead of “what roles do I have”. The aim is to find out more about the person – this is not about filling in the box just for the sake of it. Creativity is the key!

Personal Planning

Overview of a Personal Planning Process

Why do it?

Many people do not learn the skills necessary to translate their aspirations (dreams, desires) into something real, constructive and achievable.

Personal planning can be a simple format used to equip people with how to take some control of their life today in a way where they are moving towards their dreams for the future.

Over the last three decades, many ‘models’ and approaches have been developed that can assist personal planning. These include approaches like PATH, MAPS, Personal Futures Planning and others. SAMS believes the key is that the approach “fits” the person and that the “plan” results in positive results for the individual and family the only test of whether the planning approach has worked.

The purpose of a personal planning process is to assist people to get better lives.

The personal planning process can include many different aspects of personal and skill based learning.

It can be a framework to develop:

- Communication skills
- Decision making skills
- Planning skills
- Confidence
- Partnership with a service provider.

The planning process is as much about people learning to take control of their lives as it is about creating a piece of paper.

A Simple Process

Step One Do some sort of self-analysis

Strengths, preferences, needs and wants. Be holistic (ie, look at physical, emotional, intellectual and spiritual areas).

Identify connections with important people, eg, family, friends.

Be clear about the most effective communication approaches for the individual, eg, verbal, written, signing, pictures, experience and observation.

Step Two Identify aspirations (dreams, desires)

These do NOT need to be realistic. Aspirations are about establishing direction, hope and energy.

For some individuals, this stage may involve you paying close attention to “clues” people may give you.

A key question is “What does a good life look like for you?”

Making it easier for people to achieve their aspirations is the objective for supports and services.

Step Three Creating steps

Take each objective (ie, the individuals aspiration) and develop goals (steps) that takes the person closer to their dream.

There must be a clear link made between the goals you

develop - which need to be specific and achievable in the short term (eg, 1 day-1week-1month) - and the objective you are working towards.

The most effective goals are sequential. When you have completed a goal this then leads on to starting the next one. Those involved can then get the sense of movement towards the ultimate objective.

Goals (not aspirations!) need to be specific, believable, achievable, measurable and desirable.

Step Four Monitoring progress

Regularly, take time to work out how successful you have been in moving closer to the individual achieving their aspirations.

As you review progress, you may need to alter your approach, change your destination (on the basis of new information from the individual) or celebrate success.

It is an expectation that individuals obtaining support services are active participants in the decision making about the service they receive. An individual's aspirations, preferences and culture become the foundation for the design of strategies to support that individual.

This is based on the belief that:

- When we ask people what they want and how we can assist them to get it then, when we actively respond to this, we can claim to be person directed.
- When we record where we are going, how we think we are going to get there and when we think we could arrive, then there is a framework to be mutual, accountable and monitor effectiveness.

The place of “aspiration” and “imagination” in personal planning

Definition of Imagination

- action of forming **new** ideas, or images or concepts
- **creative ideas**
- the ability to imagine things that are not real : the ability to form a picture in your mind of something that you have not seen or experienced.

Imagination Wisdom

“Imagination is the beginning of creation. You imagine what you desire, you will what you imagine and at last you create what you will. ”

George Bernard Shaw

“The man who has no imagination has no wings. ”

Muhammad Ali

“I saw the angel in the marble and carved until I set him free. ”

Michelangelo

“Imagination is more important than knowledge. For knowledge is limited to all we now know and understand, while imagination embraces the entire world, and all there ever will be to know and understand.”

Albert Einstein

Aspiration

- a hope or ambition of achieving something
- a desire or ambition for which someone is motivated to work very hard.

“Far away there in the sunshine are my highest aspirations. I may not reach them, but I can look up and see their beauty, believe in them, and try to follow where they lead.”

Louisa May Alcott

“The greater danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low, and achieving our mark.”

Michelangelo

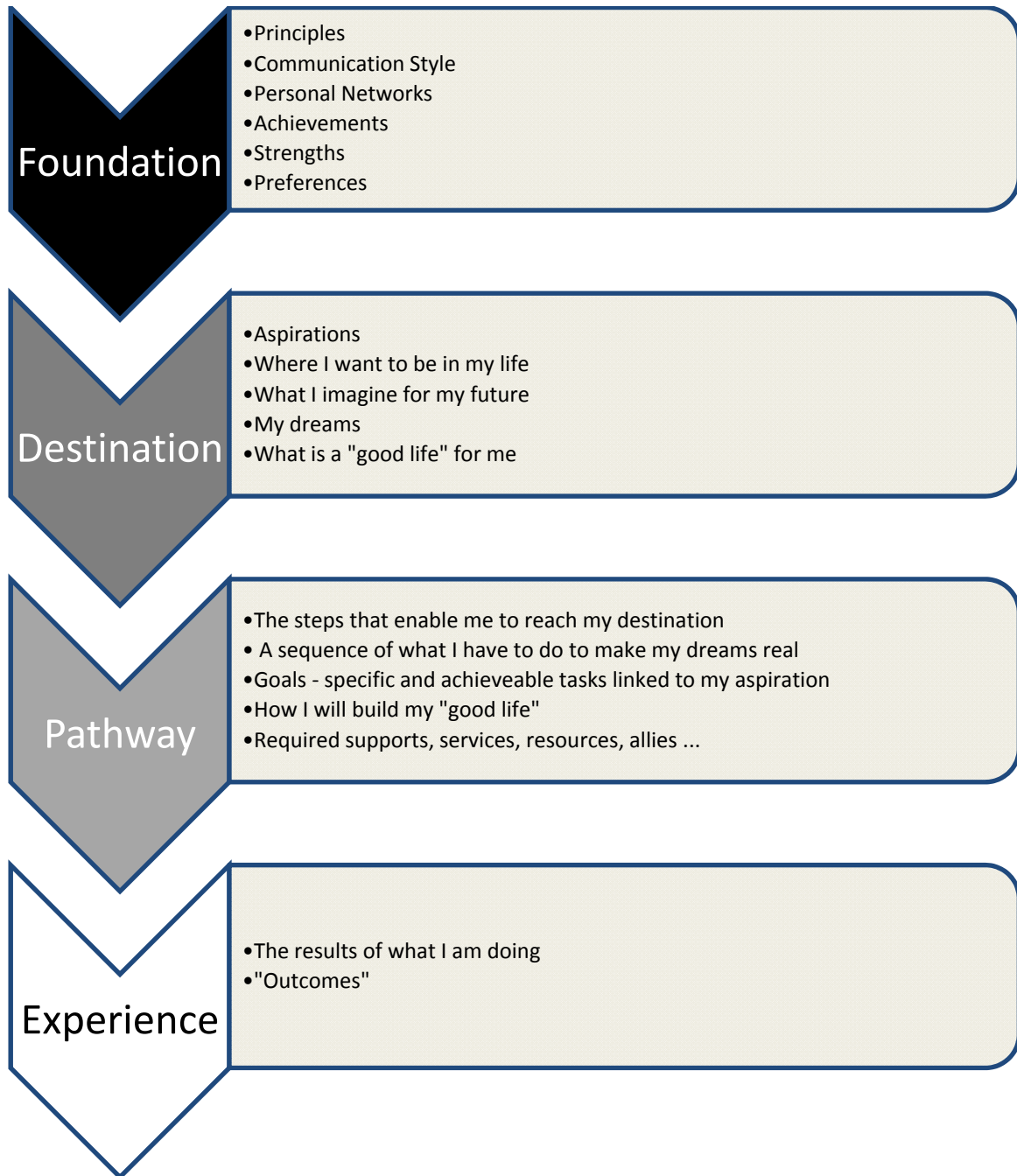
“In the long run, men hit only what they aim at. Therefore, they had better aim at something high.”

Henry David Thoreau

The Functions of Aspiration (imagining better, desiring, dreaming)

- Direction
- Energy
- Motivation
- Hope

Assisting people to build a good life (a process for personal planning):



Staff Asset Register

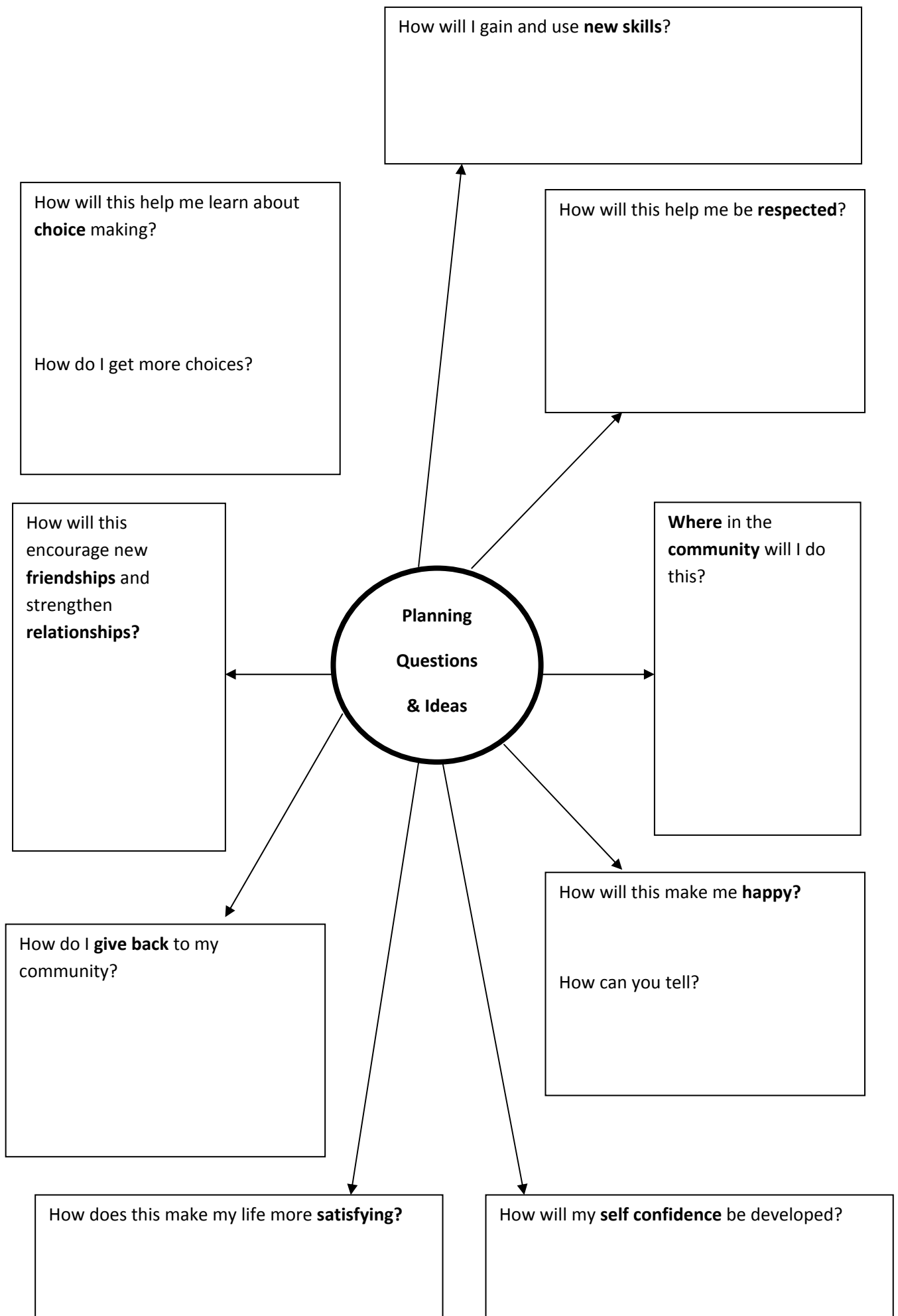
The concept of identifying, building and utilising the assets and skills that are within the local community, including those of the staff in the organisation.

The principle of asset-based development recognises that EVERYONE has skills and talents and builds on these identified strengths as part of the process of connection and community building.

As a preliminary step, staff are asked to identify their skills, talents, areas of interests and attributes.

This can be developed in a discussion called “What do I bring to the table?” This process works to affirm and acknowledge the many skills, talents and attributes within the staff team, as well as provide a starting point for connecting and linking within individuals’ local communities.

The key aims are to utilise the knowledge and connections of the staff as they relate to individual's identified preferences and interests. This means that if an individual identifies a particular activity, such as “fishing”, as an interest then their support staff may be able to use the information and contacts of the staff who have also identified “fishing” as a key activity or interest. It does not mean that the staff person who goes fishing must take the individual fishing, but rather he or she shares their contacts and knowledge to enable and facilitate links and connections that the individual and their support staff may pursue.



Community Mapping

This is a way to find out what places, people, groups and activities exist within the individual's neighbourhood and community.

Take a walk with the person and find out.

A community map is

- made by and with the individuals involved
- a mix of formal and local information
- visuals, pictures, descriptions etc
- what is relevant and useful to the person
- gaining more information about preferences and possibilities
- a tool of change and individual empowerment.

The “map” is simply walking around the individual's local neighbourhood and identifying all of the activities, potential jobs (volunteer and paid), spaces, events etc as another way of assisting the person to belong and contribute.

Some maps are made with photos. Some maps use circles (everything in the first circle is 5 minutes' walk from my house. Everything in the next circle is 10 minutes' walk from my house etc). Some maps are printed from the computer. Whatever makes sense to the person.

Most maps are a mix of identifying places, spaces and activities. Most are a mix of visuals, photos and descriptions.

The key is that it must make sense to the person.

Community maps provide an opportunity to gain more information about preferences and possibilities. It is a tool for change and individual empowerment.

Questions to think about:

Who are the people around you?

What are the places nearby?

What are the spaces nearby?

What are the industries/work in the area?

What are the recreational activities in the area?

Does any of this connect with individual's aspirations?



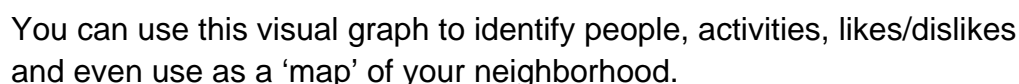
Circles of Support

This is a process of exploring how to identify, expand or acknowledge the people in someone's life. It is about being clear that friendships and trusting relationships are central to people achieving a 'good life'.

It is typical for people to gain access to social, recreational and employment opportunities through their personal connections. Paid supports have sometimes (unintentionally usually) either ignored or eroded the possibilities people have through these personal relationships. Circles of support are one way for services to recognise and value the people in an individual's life or, intentionally create and expand a personal network.

Discover

- An individual's strengths, preferences, achievements and aspirations.
- Who is connected to the individual?
- Who the individual wants to be connected to?
- How the individual wants others involved?
- What an individual might want from their connection with others?



- Assist people to “connect”. This is often best done casually, eg, shared meal.
- Encourage the individual to express what they want in their life.
- Make it easier for people to recognise the contribution they can make to the individual achieving their aspirations and goals.
- Emphasis placed on mutuality.
- Different “circles” respond to different approaches. Some “circles” appreciate someone facilitating a gathering and a formal planning process (who will do what to assist the individual to achieve specific goals), while other “circles” may simply need someone to be pro-active in ‘getting them together’. The most critical aspect of this is to find out what the individual wants and is comfortable with.

- Keep contact with the individual to ‘see how it’s going’.
- Potentially, you may want/need to organise a series of gatherings before people are comfortable and confident.
- Take your lead from what the individual wants.
- If something works well, celebrate with the “circle” (this may encourage others to be more active). If something doesn’t work out, brainstorm new ideas and approaches.

Talking Mats

A Talking Mat is a simple communication aid that is useful in helping people learn about choice making. It gives people the opportunity to express their opinions, in a safe, no-pressure environment.

Information is presented in small chunks (a visual card) and the person is encouraged to put the card on a mat, in a place that indicates “yes, I like that” or “no, I don't like that”.

People's preferences (and things they dislike) can be reviewed and explored. For example, if someone indicates that they don't like the bus, the components of “travelling on the bus” can be considered and the person can rank those. These might include:

- Waiting at the bus stop
- Climbing the stairs to the bus
- Using a bus-pass
- Finding a seat
- Sitting next to other people
- Watching out for the stop.

By exploring this concept of bussing in greater detail, for example, we can learn what a person is and isn't comfortable with, and therefore how we can support them.




When a Talking Mat is completed, it can be photographed, so the person has a record of their preferences at a certain time. This can be used to promote self-advocacy, for example, in personal planning.

For more information: see “*Talking Mats: a resource to enhance communication*” by Lois Cameron and Joan Murphy (2005) – this is a kit, with cards, booklet and DVD.

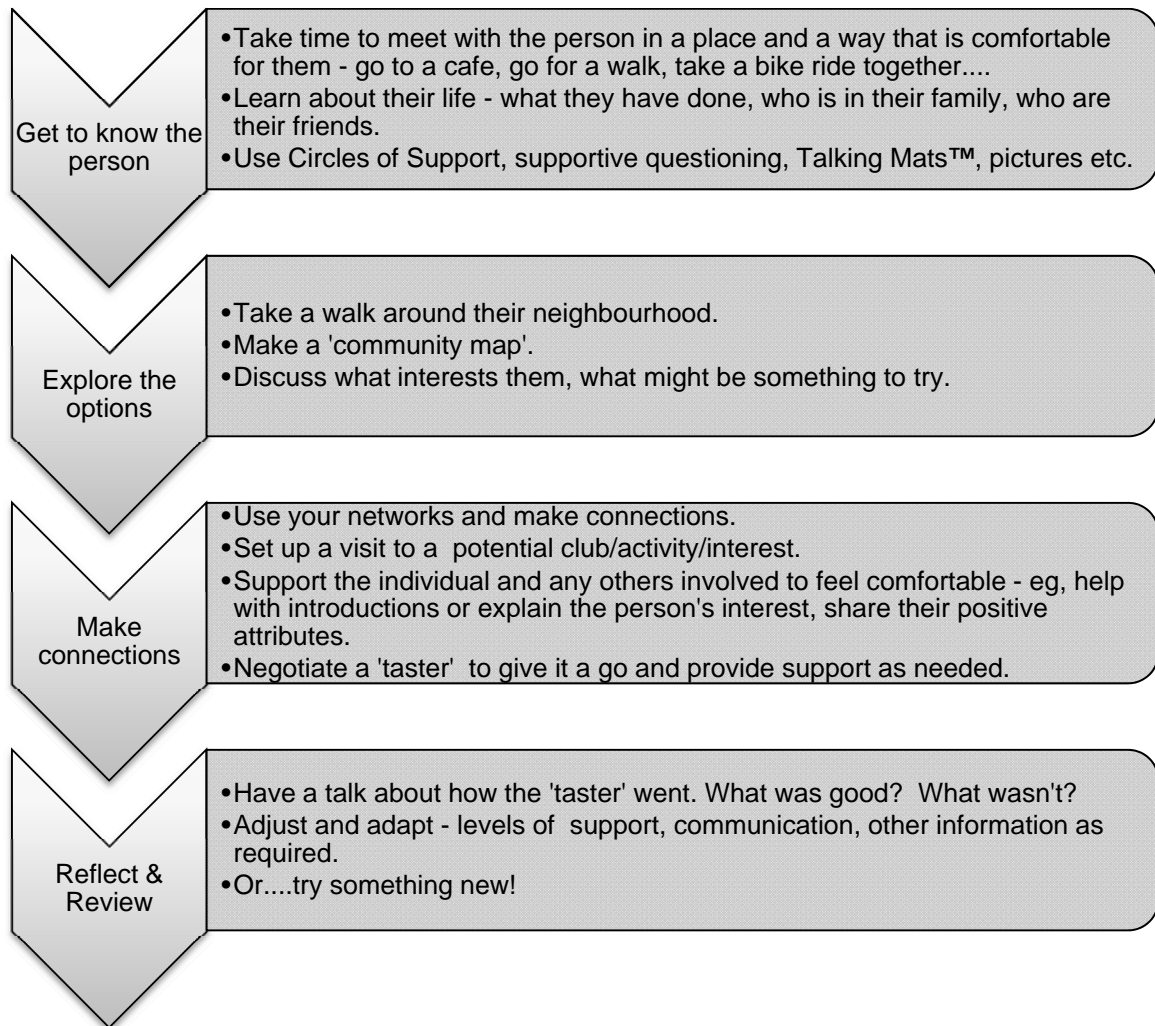
Tasters

This is a way to assist the person to have opportunities to try new things AND to identify for themselves if they like something or not.

MY TASTERS (SAMPLE ONLY)

	Date	I loved it	Not sure	I hated it	Comment
					
Police work Visit to police station to learn about jobs/activities that happen there					
Going to a concert Fridays 1 to 2pm					
Involvement in acting class Monday mornings					
Take a first aid course					

What facilitated support MIGHT look like



Once an activity, club, class, group or whatever has been identified as something to continue, work out the best way to support the individual and others who may be involved. For many situations, this is where “natural supports” begin to develop and support from paid staff can be faded out.

Always keep some kind of review system in place for all concerned. Some situations work out but many need to be tweaked or changed. Some are positive but may only last for a short time. Others may become a life-long activity.

Life is an ever-changing process so be prepared to be flexible and creative.

And then.....

The person might meet someone at the activity who lives **near** them.



That person might offer to give them a ride or walk with them to the event or have a coffee afterwards.



They might each introduce them to some of their friends or go to another event together the connections continue.....



Appendix 2 - An Example of Current Service Transformation (the “Utopia” Project - SkillWise, Christchurch)

Background and Update

Background

In 2011, the SAMS Board agreed to fund a project to develop processes and tools to progress a movement away from group-based service provision towards customised, facilitated support for individuals in mainstream settings.

SkillWise was the organisation selected by SAMS for this project. SkillWise agreed to work in collaboration with SAMS in terms of staff training and development of the “one person at a time” model, with the aim of moving to an inclusive community by creating links.

The staff at SkillWise suggested that the ultimate aim was for “utopia” and hence the project was named the “**Utopia**” Project.

From SAMS's perspective the key objectives of the partnership with SkillWise were to:

- identify specific approaches that result in tangible, positive change for individuals and family/whānau
- demonstrate how successful service transformation can occur in New Zealand.

Key aspects of these objectives included:

- establishing a facilitation-based approach, which enables individuals to experience “everyday things in everyday places” in the community, rather than the provision of segregated or fixed activities for disabled people
- adopting a “one person at a time” approach
- achieving positive change with minimal “external” resource” (ie, SAMS)
- further developing supports and services to increase confidence and capacity within the staff team and those using the service
- transferring “rhetoric” into practical skills.

Over many years, SAMS has explored different approaches to service transformation. The agreed process was to combine Developmental Evaluation, customised training and practical “coaching” (the demonstration of specific skills in partnership with hands-on staff), to achieve service transformation.

The anticipated outcomes for those working for and supported by SkillWise included:

- increased numbers of people participating in the community on an individual basis, ie, social inclusion, community participation and supported employment
- increased “flow” of individuals towards integrated settings
- increased staff skill and demonstrated strategy related to “facilitation” and utilising community assets
- to build community around the individual, rather than the service.

The project

The Christchurch earthquake in February 2011 meant the loss of the SkillWise building, many records, documents and much equipment. It also provided a totally new approach to this project as we were starting with a “blank sheet of paper”.

Four staff were selected to initiate the project and they invited four individuals who use SkillWise services to participate.

Key aspects included “facilitating” a process of getting to know the person better so staff and the individual's networks might connect them with people and activities within their local communities. This included getting to know about the people in their lives, the activities that they do and do not like, and their dreams. As information was gathered links were made and the person supported to participate in more activities of their choice/interest and, for most, with staff support being replaced or supplemented by more “natural supports”.

This report is based on two key developments in the provision of services and supports to people with disabilities and their families.

The first development that informs this report is from the work of SkillWise.

SkillWise's Individual Client Support (formerly “Utopia” Project) has been developing for over three years. Over this time, SkillWise and Standard and Monitoring Services (SAMS) worked in collaboration to develop processes and tools to progress a movement away from group-based service provision towards customised, facilitated support for individuals, with the aim of moving to an inclusive community by creating links. Staff at SkillWise suggested that the ultimate aim was for “utopia” and hence the project was named the “**Utopia**” Project. The “Utopia” Project is now called **Individualised Client Support. (ICS)** and is now referred to as Individualised Client Support or ICS in this document.

The process involved

- Enabling individuals to experience ‘everyday things in everyday places’ in the community, rather than providing segregated services for disabled people.
- Working with “one person at a time” to support individuals and to inform organisational changes.
- To increase the confidence and capacity within the staff team and within the individuals using the service by developing practical skills and strategies for connecting people and increasing belonging.

Key steps in the change process

Service transformation at SkillWise has involved several key ingredients:

- a willingness to make change
- a shared vision in the team
- coordinated input from skilled mentors
- one person at a time process
- a strengths based approach to service transformation
- practical skill sharing
- an emphasis on “customising” approaches and supports.

For the individuals using the service

The activities, involvements and relationships that have been developed through the “Utopia” Project are a practical testimony to the belief that individuals have a lot more capability if given opportunities to try new things.

Having opportunities to “taste” a wider range of activities and interests enabled people to learn about their likes, and interests through participation and experiences.

Natural and spontaneous changes were observed when people experienced a better way of doing things.

For the staff of SkillWise

Staff made a change in focus.

Personal planning sessions and subsequent staff support moved from a focus of offering on-site groups to truly working in partnership with individuals and their families to assist the individual to have the life they truly want, in a community to which they belong.

Staff also spoke about the “ripple effect”. As previously described, this project started small, with four staff working with one individual each. As success, enthusiasm and momentum grew, so did people's motivation and confidence to try new things.

"We are past the tipping point – we couldn't go back to groups now."
- SkillWise team leader

For the local community

Members of the community benefit from this process by learning to interact with disabled people as individuals on the basis of shared interests, passions and ability to contribute.

There is movement to an inclusive community by creating links between individuals, activities and places which enhances the lives of all who are involved.

The first review identified the following positive changes

- A move from offering a segregated day base service towards developing supports and services based on what individuals identified as important to them.
- Utilisation of a range of tools and strategies to assist individualised support and connection (eg, one person at a time, community mapping, tasters, belonging strategies etc. See Appendix 1).
- On-going communication and development at all levels of the organisation.
- Positive outcomes reported by the individuals being supported by SkillWise.

Progress

SkillWise started the "Utopia" Project in April 2011 with four individuals. They now have **112 individuals** accessing activities of their choice in the community (non-segregated) for some part of their weekly schedule.

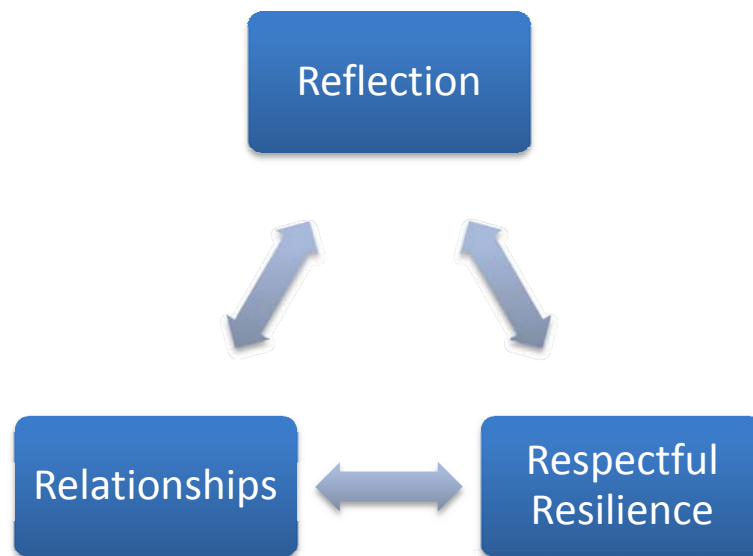
The second development on which this report is based is ***Enabling Good Lives***. ***Enabling Good Lives (EGL)*** is a partnership between government agencies and the disability sector aimed at long term transformation of how disabled people and families are supported to live good lives in everyday places. Key aims are to move from only centre-based systems of support to identify with an individual and their support network, activities and interests that are meaningful to them and to assist these individuals to pursue these interests through connecting them with their local community. This approach also enables the individual to have control over the way their support funding is used giving them more control to determine how they wish to pursue and live a **good life**.

Emerging Concepts, Strategies and Processes

What continues to emerge is the inter-relatedness of the following values and strategies:

- **Commitment to a shared vision by ALL involved** – This includes individuals being supported, their families and support networks, SkillWise staff, management and board and allied partners (eg, SAMS, other providers etc).
- **Taking time** – Change takes time and with this can come positive learning and development. For some people, making changes comes easily and for others more time and support is required. Taking time to make changes that enable individuals to feel positive and in control is crucial.
- **Communication and relationships** – Regular and frequent opportunities need to be created to share, reflect, review, change, and challenge in order to ensure that individuals are being supported in ways that are the most meaningful and effective for them.
- **Skill development** – Developing specific, practical belonging strategies, engaging with communities, networking and other methods to assist individuals to find and connect with people and places with whom they share an interest are key skills for staff development. This has meant a focus on inclusion and participation not as a ‘disability issue’ but as a ‘citizenship’ and ‘community development’ issue.
- **Family and support network involvement** - Including and involving families and supporters in the process of exploration, decision-making, connecting and planning at all levels is an on-going process and must continue to be so.
- **Focus on support, not disability** – As activities, interests, places are identified as possibilities for the individual then the focus is moved from a “disability” issue (eg, Do you have the ability to do this?) to a support issue. For example, if an individual is interested in Italian cooking, then the individual and their support network find out what is available, what is needed and then adapt and/or provide support as identified by the individual’s strengths and preferences to make this happen.
- **Upgrading policy, human resources and technology** – Changing and adapting policies, job descriptions and technology to reflect new ways of supporting individuals. For example, the development of a ‘cloud-base’ computer system so that information/support can be accessed and provided from any location.
- **Perseverance at all levels** – This pertains to the need to continue to inform, educate, involve and listen to all of the various stakeholders in this process of change. It is acknowledged that change can signal a loss of the familiar and for many this can be a daunting prospect. It is also recognised that the process of working collaboratively to provide positive, meaningful and life-enhancing

opportunities requires a greater amount of 'respectful resilience' as individuals, families and the community learn and support what a 'Good Life' might look like for each individual.



Reflections on the move towards Community Connections

Reflection is both a planned and spontaneous aspect of service and support.

How it's going: individuals' perspective - people using SkillWise services and supports

Individuals reported a wide range of activities, work experiences, paid and volunteer jobs in which they were involved. Many stated they were doing more things in the community and less at the base.

People now comment on how much more they share their experiences and ideas within the service and throughout the community. Several of the individuals interviewed said they got some of their ideas for trying new things from hearing about them from their friends at SkillWise. Rather than this discussion promoting 'everyone doing the same thing', it was found that this generated a broader range of ideas and thinking outside the box.

There is a much more fluid process around trying out new things. Individuals report that they feel much better getting to have "tasters" and not having to commit to something before they understand what it might entail. People are encouraged to 'reflect' and think about if they liked something or not in order to continue to gain confidence to make choices and to learn more about themselves.

Some individuals were very positive about meeting new people, taking part in activities in their neighbourhood and engaging in their local communities, rather than travelling across town to the 'base'. Many people spoke of feeling valued for the work they were doing, be it volunteer or paid.

The individuals interviewed had very strong identity about:

- who they were
- what they liked to do, and
- what they wanted to try.

People reported that staff were good about sharing new ideas with them and they were regularly encouraged to try new things.

How it's going: family/support network perspective

Some of the families interviewed reported a noticeable increase of confidence in their son or daughter.

Some reported their own surprise at what their family member had been able to try, do and learn.

They stated that the staff had assisted their family member to make more choices and to feel more in control of their own lives.

One parent commented that while her family member had the "passion", SkillWise staff were able to develop the young woman's skills so she was able to pursue this passion.

Parents stated that they appreciated the more 'informal' style of planning now and they felt strongly that family should continue to always be involved in this process. Some parents stated they felt more relaxed meeting over a cup of coffee at a café or having meetings as needed rather than as an annual "chore".

Families varied in their response to the change to moving towards more community connections. There was a general view that SkillWise should maintain a safe base (or bases) for individuals in order to continue to promote skill development, friendships and maintain safety as well as continue to promote community connections and involvement. They stated that SkillWise should not "throw the baby out with the bathwater".

Of the families interviewed there were three distinct views that emerged. A small group did not want any change and felt that SkillWise offered a wide range of choices and activities for their sons and daughters. They expressed that the "community doesn't want them" and were concerned about the safety and well-being of their family member.

The second and slightly larger view was that of being very supportive of the changes to being connected to one's community and being less dependent on family and on paid staff. Some of these families had volunteered to share their stories with other families to help them feel more comfortable about their sons/daughters making more of their own choices. These families stated that they would like the process sped up so that more individuals could be supported in this way.

The third and majority viewpoint was that many families are 'cautiously optimistic' about the changes to more individualised focus and community connections. They expressed that they still needed more information and involvement and did not want to lose the positive things currently provided by SkillWise. They identified good staff, a base to belong to, friendships and support as positives they did not want their son or daughter to lose. They could see the benefits of more connections but requested more clarification about the process.

How it's going: management/staff perspective

Some examples of the process of reflection include:

- **Name change**

One of the recent changes has been the re-naming from the "Utopia" Project to Individualised Client Support (ICS).

The new name was developed as part of an on-going discussion with staff, families and those using SkillWise services. As they reflected on what was happening, it was strongly felt that "Utopia" was no longer a *project* but a *process* – a way of supporting and connecting people. There was concern that the word 'Utopia' may seem to convey something that has to be perfect or even unattainable. This way of supporting individuals has become very attainable and very doable. Having a name that is easy to understand and is explicit about how people are supported was another factor in this name change.

- **Staff job descriptions and support systems**

New job descriptions have been developed which more accurately reflect the roles and responsibilities in assisting individuals to connect with and belong to their local communities.

Staff report there is willingness and expectation to merge skills and information, especially in the area of employment to ensure the individual is supported appropriately. This is significantly different to previous expectations of running group-centred activities at the day base with minimal input into supported employment or other 'specialist' activities.

Key Performance Indicators have been built into the new job descriptions of all community facilitators to provide maximum clarity and understanding of roles and

responsibilities. These include expectations about supporting individuals, personal development and staff behaviour that demonstrate a range of skills and attributes.

The process of planning is changing to reflect a more realistic and meaningful approach. While a planning meeting is held at least once a year, meetings are often more likely to be held more frequently and informally. Families and individuals report that meeting for a cup of coffee is a good way to 'think together'.

Indicators for success now involve analysing and discussing what individuals are doing. One of the managers meets with each community facilitator on a monthly basis to reflect and review on what is happening for each individual they are supporting. The focus of these reviews is on process, not achievement. Discussions include current activities, progress made, barriers identified and ways to overcome them and the development of 'next steps'.

- **Policy and procedure document**

SkillWise has recently embarked on making significant changes to the SkillWise Policy and Procedures document.

The result is a much more aligned document that reflects the values and principles of an individualised facilitated support service. Policies such as "Attendance" are no longer relevant and have been replaced with policies and procedures that ensure supports and services are person-driven.

KEY Learning:

🔄 **Information and involvement by all stakeholders is an on-going process. This is important for individuals, their family/whānau and support networks as well as other providers and local communities.**

🔄 **The process of getting to know individuals, their communities and connecting them 'one person at a time' continues to be reported as a key method for successful connections.**

🔄 **Activities and work is focused on individuals' interests rather than their disability. Interests and preferences are identified and pursued. Disability is factored in terms of any support needs, not as an assessment of ability to do or not do the activity chosen.**

🔄 **New structures, especially in Human Resources, have been adapted or changed AFTER trying out support practices and ensuring the changes are of benefit to individuals. An 'action research' approach has been taken to ensure that significant amount of time is allowed to trial processes and practices to see how they work, what needs to be changed, refined etc.**

A Good Life for L

“I am very busy and I like it.”

L had been involved in a number of groups at SkillWise in the past.

She now has a range of paid and volunteer jobs as well as other activities that she enjoys. She works at a school to ‘help kids out’ one morning a week. She is pursuing her own education through an adult literacy course three days a week. She works at the local Working Men’s Club on the weekends and is an assistant Girl Guide leader.

She enjoys Karaoke and goes with a friend each week. She is interested in finding out if she might be eligible for her Learner’s Drivers Licence.

Relationships

The importance of developing trusting and honest relationships is seen as the **foundation for all development and support**. The view of a “shared journey” that was driven by the individual and their family/whānau and support network was a recurring theme.

How it’s going: Individuals’ Perspective - People using SkillWise services and supports

‘Having one to one time, having a coffee, going for a walk make me feel good and makes me know the staff really want to help me do the things I want to do.’

The statement above sums up many of the positive remarks attributed to staff by those who use SkillWise services.

People reported that they felt supported and encouraged by the staff. They stated that the staff ‘were good sorts’ and helped them a lot. They stated that the staff helped them with problems and helped them make their own choices.

Several people stated that the ‘big bosses’ were good to work with also.

It was stated many times that individuals made choices about what they want to do, not the staff.

How it’s going: family/whānau/support network perspective

Without exception, the families interviewed **spoke positively of their relationships with SkillWise staff and management**. They described them as approachable, warm, understanding and knowledgeable. They felt that if there were problems or new ideas they were able to discuss them easily.

While families felt confident with the staff and their relationships with their sons/daughters, some expressed their concerns about supervision and relationships outside of SkillWise. This was primarily concern about the safety and vulnerability of their family member, especially if they were 'in the community'.

The development of 'natural (unpaid) supports' is an area for continued discussion.

Some of the family members suggested having more forums for families to learn more about ideas such as the development of natural supports as well as to hear from those families specifically involved in the Christchurch EGL demonstration. The families stated that more information was required for many of them to understand more fully aspects of individualised support and community connection.

How it's going: management/staff perspective

There has been a concerted effort to develop and maintain a positive team culture.

Management endeavours to model values and principles by being inclusive, respectful and appreciating on-going learning. The 'team' culture is now viewed as a 'way of being' and both staff and management feel that they are part of a vibrant and dynamic group of people who include the individuals they support.

Without exception, the staff stated that their relationship with the individual is the most important part of their work. The practice of the "one person at a time" approach has reinforced the imperative of knowing and supporting an individual well. They said they aim to be honest, helpful and supportive without creating dependency but also acknowledging shared interests.

The staff report that they are 'always checking in' with each other. They share ideas, information and resources willingly. There is no "ownership" over individuals or information and they report that they often "blur" the boundaries (eg, employment support and community participation) to ensure a good process or outcome for an individual.

Being 'challenged' by an individual's choices, a family's perspective or each other is now seen as an opportunity to listen, learn and develop understanding. This is key to the development of trusting relationships and this is acknowledged openly and often.

The staff also commented that they are more cooperative and collaborative within their team and that, in turn, allows them to more effectively use their skills and talents. They say they continue to work to find alliances with each other, family, other providers and organisations like SAMS.

KEY Learning:

☛ Relationships form the basis of all support. Good relationships seek to empower, enthuse and encourage positive change in all partners.

☛ Those in the community are getting to know a person with a shared interest rather than a 'client who needs support'.

☛ Individuals are gaining confidence and share ideas and thoughts with a wider range of people.

☛ Families are asking to both be involved as allies and support to other families, and to continue to have more information about individualised support and community connections.

A Good Life for A

A had worked at a large 'sheltered workshop' before coming to SkillWise.

He is now involved in a variety of activities both at SkillWise and out in the community.

He is involved with the SkillWise photography and cooking groups. He is currently pursuing his Level 2 Computer Skills at CPIT, and is a volunteer at Willowbank. He has paid work at a local cafe and is looking to pursue his biking skills.

He and his mother commented positively on the number of opportunities that he now had.

Respectful Resilience - Perseverance

Being able to persevere and hold to the vision of individualised support is a process that SkillWise endeavours to manage with both respect and resilience.

How it's going: individuals' perspective - individuals using SkillWise services and supports

The individuals interviewed are now involved in a much wider range of activities and subsequently their support networks are growing. They acknowledged the importance of being supported to make their own choices and to try things out before they make a commitment to stick with the activity.

Individuals who use SkillWise supports are represented on the SkillWise Board and mentioned this as an important role that shows they are included and valued.

How it's going: family/whānau/support network perspective

As stated earlier, the majority of families are very happy with the options and opportunities for their sons and daughters but are also cautious of major change. The need for continued involvement and information about the on-going process of change is very clear.

One family gave an example of being an ally in this process by discussing, with a residential provider, ways to enable their family member to participate in an activity that had been identified by SkillWise. Another family member had discussed work opportunities with another family member as a way of sharing information and ideas.

How it's going: management/staff perspective

The process of change has meant that staff are committed to the vision, values and practices of supporting individuals to make choices and engage with their communities. It has taken some time and a few staff decided to leave. Their decisions were taken respectfully and, as a result, some former staff still maintain contact and provide other types of support and connections.

There has been deliberate move to take time to try things out.

The 'one person at a time' approach has been a key in positive service transformation. This has enabled and fostered a positive approach to getting to know the individual (not a disabled group) and to "learn as you go" making learning a positive discovery and on-going process.

All involved have persevered and stuck through changing times and changing ways. For example, there are no more imposed timetables. They are changed as needed. Some aspects of support have been retained. There are still group activities that happen at the SkillWise base, but these are now focused on individuals' choices.

The staff commented that they continue to work with families, whānau and support networks, including other providers, as a way of sharing information and developing a more collaborative approach to supporting individuals. This includes looking at ways to provide support that is more fluid and fits with being involved in one's community. For example, many courses or activities do not happen just during the week between 9am to 3pm (the usual operating hours of a day service). Being more flexible about hours of work, as well as liaising with families and residential providers, is an area of current work and development.

New initiatives in social enterprises are also being considered to further enhance the service transformation of SkillWise. Through these initiatives the service is able contribute to the local community, as well as the community contributing to the good lives of the people who use the service.

KEY Learning:

🌀 Being clear about the intentions and objectives of providing support to individuals provides focus and direction as well as a reminder of purpose.

🌀 Accepting that change takes time, and with this can come much learning and development, promotes a process that enables all involved to assess and develop their part in the process.

A Good Life for G

G's mum said that she was very impressed that SkillWise had persevered with G in spite of initial behavioural, communication and frustration issues.

G now has an iPad to assist with communication and is involved in what she wanted to do. Her current schedule is "brilliant – she does what she likes".

The staff 'bent over backwards' to change her schedule which now includes art, computers and cooking.

She goes to another provider twice a week but has also learned to bus from her home to SkillWise, which is a considerable achievement due to the distance and communication.

G is keen to get involved with learning Te Reo Māori for next year. Always planning ahead!

A Good Life for P

P has worked at a local restaurant for three years now and enjoys it a lot. He works on the weekends and does set up and serving.

He enjoys public speaking and recently won a competition hosted by Rotary!

He is involved in a drama course and computers at CPIT.

He also helps host the SkillWise radio show at the local polytechnic. He is interested in finding out about Tai Chi and maybe joining a gym in the future.

More About SAMS

Vision: For disabled persons and family/whānau to be the primary contributors to service and sector development.

Mission: To provide evaluation, education, research and other service development services that effectively enable people with a disability and their families to participate in the creation and maintenance of high quality disability services in New Zealand.

SAMS is governed by disabled persons and families



Aloma Parker

Role: SAMS' Board Chairperson

Aloma has been with SAMS since 1999. Before that Aloma worked for many years in service delivery and management for people with mental health challenges or intellectual disability in the NGO, public and voluntary sectors.

Aloma believes everybody has the right to participate as a valued member of society. As a consequence Aloma also believes we must address issues of inequity in our society in order to equalise opportunities for people with disability to live with maximum independence and dignity.

Aloma is a trained SAMS Team Leader and a registered Clinical Psychologist, with special skills in CBT and behaviour therapy.



Gary Williams MNZM

Role: SAMS' Board – Deputy Chair

Gary is Ngati Porou and a disabled person. He's been directly involved in the disability sector his whole life and for at least the last 35 years, he's been active in the governance and management of various sector-related NGOs and companies both in New Zealand and internationally.

Gary and his wife, Ruth Jones, are Christchurch-based consultants to the sector. Previously, he was the CEO of DPA for a decade and, before that, a scientific software developer for GNS Science.

Gary believes that SAMS is ideally positioned to facilitate the transformation of service provision to disabled people and their families. Most recently he's been thinking about the effects of imported Eurocentric service provision ideas that see people having to create artificial boundaries between themselves and significant others in their lives to survive on a day to day basis. While everyone has individual needs, he wonders if the thinking should be about recognising that people will thrive if they are part of inter-connected networks, ie, family, whānau, friends and local communities, rather than just the limited catering of services to people as individuals.



Mark Benjamin

Role: CEO, SAMS (Standards and Monitoring Services)

Mark has been working, in a range of roles, with SAMS since 1989. Over this period, Mark has led a variety of evaluation, education, research and resource development projects.

Previously, Mark has been involved in several roles within the disability sector, developing services that effectively enable individuals and families to create good lives for themselves.

Mark believes the practical application of concepts like equity, respect, inclusion and partnership transform individuals, families and communities.

Approximately 80% of SAMS evaluators and educators are disabled persons or family members.

Since 1979, SAMS has been working in New Zealand to ensure the perspectives of disabled persons, and families are central to sector and service approaches.

SAMS internationally pioneered a Developmental Evaluation approach in disability services.

SAMS primary work involves:

- Developmental Evaluation
- Family Development and Leadership
- Staff Education
- Research
- Service Transformation
- Resource Development

SAMS is happy to explore ways we can work together.

Contacts

Mark Benjamin
CEO, SAMS

Phone: +64 03 5288 763 or 0274 345 001
Email: samsmb@xtra.co.nz

SAMS National Office

Phone: 04 569 8301
Fax: 04 569 8307
Email: samsno@actrix.co.nz

Website

www.sams.org.nz