Developmental Evaluation Report Summary –

**Supported Lifestyle Hauraki Trust**

At midpoint of certification cycle for community residential services – sensory, intellectual and physical disability

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| Name of Provider: | Supported Lifestyle Hauraki Trust |
| No of houses (8 or more beds) visited # and location | # 5 Thames  |
| Date visit/s completed: | 26 January 2021 --- 28 January 2021 |
| Name of Developmental Evaluation Agency: | SAMS (Standards and Monitoring Services) |

**Methodology**

Individual service (house) reports were completed by a range of SAMS Evaluators using a standardised developmental evaluation process and evaluation framework.

The SAMS Developmental Evaluation Approach primarily uses qualitative methods and a partnership model.

The methodology is consistent with:

* individualised focus
* partnership
* inclusion
* equity.

The approach enables both a process and outcome focus allowing the Evaluation Team to equitably represent the different views of the defined groups and compare the outcomes for the differing groups.

Evaluations are conducted by teams and normally each team includes at least one consumer or family member. Evaluation Team leaders and team members receive comprehensive training.

Information can be gathered through:

* observation
* individual and group face-to-face interviews
* telephone interviews
* review of protocols and procedures.

Before departing a service, initial feedback is presented to those involved in the evaluation process. A draft report is prepared on the basis of evaluation team consensus and circulated. This draft is then negotiated with the provider to determine a final document, including recommendations for development.

Individual service (house) reports were then collated to identify themes. The primary method of analysis involved a senior SAMS Evaluator reading all of the reports, summarising the key areas against the checklist specifications and providing a count of broad categories for each recommendation. The themes, drawn from the finalised individual service (house) reports, are the basis for this report.

Once summarised, the overview report was read by an independent person for clarity and balance.

General Overview:

Five residential services were the subject of this mid-point review of Supported Lifestyle Hauraki Trust and involved xx people aged between xx and xx years living in the xx area. The Evaluation Reports describe the positive experiences the people are having and their availability of opportunities which include community integration. The reports also described dedicated staff teams who are determined to provide the people with a good life.

The people and the seven families interviewed spoke encouragingly about the support Life Stylers were getting, and all indicated they were satisfied or very satisfied with the service being provided. A wide range of involvement in community based activities is evident in which the evaluators believe contributes to personal satisfaction.

Areas for development were varied and in a few instances were ‘person/house specific’. Ensuring Home Agreements are up-to-date and transparent was identified in all reports, as was the need to maintain the organisations unique character while moving forward with and EGL focus. Improving communication with families was a theme repeated in the reports. One report noted the need to ensure sufficient staff support is available so the people’s potential for growth and develop is maximised.

**Areas of Service Strength**

* Strong, dedicated, caring, committed staff teams
* Service provided is based on what the people want
* Strong connection to the wider Thames community

**Areas of Suggested Development**

* Review Home Agreements
* Improve communication
* Maintain unique character while continuing to promote the EGL Principles.

**1 – My Identity / Tuakiri:**

The people are well respected and well known by the staff teams who support them. They are supported to pursue their religious and cultural identity and families were positive about the contact they had with supported staff.

The people make choices about the role their family members have in their lives, and the service provides support to ensure desired contact is maintained.

The reports noted mixed views from the families with some saying that communication was an area which needed improvement. The majority of the families felt their family member was being supported to have ‘a good life’ and comment in one report included a family’s comment stating the staff are providing ‘an amazing level of care’.

The majority of the people are able to communicate well, with one person using signs to express themselves due to deafness. The people are encouraged to ‘use their voice’ which translates to speaking up and share their thoughts and views. The people use a range of technology to make contact with others easier, eg, cell phones, computers, iPad®. One of the reports described frequently used phone numbers being programmed into a person’s phone to give them greater control over their contact.

The reports noted the dedicated support and understanding shown towards the people and the commitment of the staff teams for helping them achieve their goals. The organisation’s policy of ‘Lifelong Support’ and the statement “*We provide support akin to that of family building trust and a sense of belonging with our whanau. We offer lifelong support, including end of life services. We never give up on our people.*” is an experience felt by several people represented in these reports.

Two reports spoke about the ways in which the people are supported to know and exercise their rights. Several reports mentioned the effort that has gone into helping the people achieve goals, resolve issues, manage behaviour and find appropriate accommodation.

**Area of Service Strength / Improvement Noted**

It is clear in all reports that the mana of the people is acknowledged, upheld and enhanced.

Each person has a current service plan from the local Needs Assessment and Service Coordination (NASC) agency and a service agreement.

**2 – My Authority / Te Rangatiratanga**

The reports described the numerous choices the people make which influence their lifestyles. These included choosing how to spend their time, eg, participating in day programmes, exploring interests, attending ‘community spaces’ and where to live. One report mentioned someone’s desire to explore computers and this was noted as a recommendation.

The people choose how to personalise their home environment and where necessary modifications were made to suit specific requirements. A comment stated in one report, “the house belongs to X” reinforced the autonomy the people experience.

Several of the people attend the Café for their main meals or have them delivered to their homes, others spoke about planning meals, making their own drinks and snacks and about their involvement in meal preparation. In one report it was noted that the people expressed a desire for greater involvement in menu planning with the possibility of helping out more with meal preparation. This was noted as a recommendation.

The organisation has introduced the ‘Way Finder’ model of service delivery in an effort to return to a more person-centred focus which is based on EGL Principles. Mentioned in two reports was the need to continue exploring how principles can be translated into day-to-day actions.

The people are supported to have a lifestyle plan if they choose. It was noted in three reports that the people or their family have declined to have a formal plan. In two reports there is indication that supports are available to the people to achieve the things they want to do, despite there not being a formal plan. The plans which have been developed represent a range of personalised goals, including sky diving, selling art creations, becoming a bowling tutor and pursuing IT interests.

While Home Agreements were found in most of the people’s files they are yet to clearly state the amount of the WINZ benefit which is being retained by the person. As this figure changes annually (albeit by small amounts), annually reviewing the agreement will ensure it is kept up-to-date. This was noted as a recommendation in all reports.

**Area of Service Strength / Improvement Noted**

The people chose who they live with and where they live, a number of people have lived together for some time with newer people transitioning into the service following appropriate introductions. Comments made by a family member in one report stated “X adjusted very well”. One report highlighted the need to ensure moves between the homes were done with full consultation. Overall compatibility is achieved and some people are supported by staff to manage behaviour that may impinge on the lifestyles of others.

The reports noted that the people are supported by committed staff who know the people well. In two reports positive comments were made about the way staff used “out of the box” thinking/approaches. In one report it was noted that the people could experience greater autonomy and the service was encouraged to review the staff hours needed to further support growth and development.

**3 – My Connections / Te Ao Hurihuri**

Like other people associated with the organisation, they are known by the wider Thames community. They attend markets, community events and concerts in line with their preferences, often accessing these independently. The organisation is mindful that as it has grown, the need to expand has meant that those associated the Trust have fewer opportunities to connect on an individual basis.

The people access doctors and dentists as required and are supported to manage a range of health conditions. Specialists are accessed when required, eg, a podiatrist, optometrists, and neurologist.

**Area of Service Strength / Improvement Noted**

In the past, the intimate size of the Trust, where homes were clustered around the central hub, has meant that it has been easier for the staff and management to know each of the people they support. However, the growth in the last few years has meant that some homes are now scattered in the wider Thames community. Additional staff and Team Leaders have been required and a supporting management team has been established.

With the growth, the hub premises became insufficient so additional office facilities were obtained nearby. The current features of the new building make the building inaccessible to some people associated with the Trust. It was noted in all of the reports for the Trust to re-examine how the use of the new building fits within the EGL Principles as it has unintentionally created a feeling of ‘us and them’ and a ‘barrier’ to accessibility. This concern was reported as a recommendation in all reports.

**Area of Service Strength / Improvement Noted**

**4 – My Wellbeing / Hauora**

The people are supported to keep good health and support is provided to meet any health need specific to the person. Medication is held centrally and is administered by a ‘Senior Support Person’ who has the role of dispensing the medication where they person is, eg, their home, café, etc. at the appropriate time of day. A Clinical Lead (nurse) is employed by the organisation and a Medi-Map system is used to track medication that is distributed.

**Area of Service Strength / Improvement Noted**

Fire drills are regularly practised and fire extinguishers are in the homes. Several reports indicated that the people knew what to do in the event of an emergency. The staff participate in evacuation training and a pandemic plan is in place within the organisation.

The service has sufficient provisions to support all of the people they support for several days. Civil defence kits are located at several central locations, stock take sheets are used monthly and provision levels are maintained by a Health and Safety Advisor.

Two of the reports raised the concerns for the safety of some people when accessing the community and the Evaluation Teams were encouraged to hear about strategies to minimise vulnerability. Awake night staff are employed by the service and they check in on the people who need this support.

Some of the people are able to use the telephone and seek support if required. Several of the homes are located near the hub so additional assistance is nearby if needed.

**5 – My Contribution / Tāpaetanga**

Holding valued roles is one way in which the people’s contributions are recognised and valued. The people represented in this review hold roles such as son, daughter, brother, uncle, volunteer, sports participant, community citizen, church member, artist and friend.

The people are involved in a range of community-based activities some of which are provided by the organisation.

A monthly newsletter provides information, events and activities as well as an avenue for people to share their stories.

Three of the reports noted that the families have been included in telephone surveys and that feedback is analysed by the service. There is uncertainty whether the families have been given feedback regarding the survey.

Regular house meetings provide opportunities for the people to share their views, for their voices to be heard and for them to be listened to. It was noted in one report that the Trust has developed some easy-to-read information, eg, House Manual as a way to increase the involvement of the people they support.

**6 – My Support / Taupua**

The people talked about the support the staff provide to them and seemed to appreciate the way they are supported. One report spoke about the person being on the interview panel when choosing support staff and another report noted the sensitivity in which the staff worked around one person’s safety and risk.

The complaints process is clear and can be found in the *Home Agreement* and in the House Manual. In three reports the people are encouraged to express their views through house meetings.

In all of the reports, communication was identified by the families, staff and the wider staffing team as an area in need of improvement. It was described that poor communication detracted from many of the valuing aspects of the Trust. A drawback to the expansion of the organisation is that there is a greater need for more purposeful ways of keeping families and staff involved in the development of the organisation. While the EGL Principles are often directed towards the people who are being served, it is important for the service to be mindful that those same Principles are relevant to staff, families and all New Zealand citizens. Developing and implementing strategies through which information can be shared could be one step which has the potential to improve communication.

**Area of Service Strength / Improvement Noted**

The Trust uses an electronic data collection system which is password protected.

The staff are aware of the importance of recording information accurately and time is allocated to completing daily notes. The people are encouraged to express their views and give feedback when asked.

**7 – My Resources /Nga Tūhonohona**

Each person has support options as assessed by the local NASC and the support contract (service agreement) provided to the service. As per the current system of service agreements, the amount of funding allocated to the service is unavailable to the families.

One report noted that one person who struggles at times to manage money is supported to budget and plan.

**8- Organisational Health**

Measured against the Social Sector Accreditation Standards.

The organisation has completed the Social Sector Accreditation Standards with the Ministry of Social Development. Accreditation covered the following services:

* Client-centred services (Level 4)
* Staffing (Level 4)
* Health and safety (Level 4)
* Governance and management structure systems (Level 4)
* Financial management and systems (Level 4)
* Resolution of complaints related to service provision (Level 4).

**9 – Value for Money**

Each person is supported within a community residential contract, with some requiring ‘high’ or ‘very high’ levels of support. Service agreements are held by the provider. It was noted that the organisation has a constructive relationship with the local NASC agency.

**Progress on Meeting Corrective Actions**

**Corrective Action 1:**

**1) Corrective Action:**  Staff performance appraisals need to be current

**2) Progress:** 2019/2020 annual appraisal documents were developed which set dates for annual appraisals to occur. These were spaced over a six-month period. Evidence provided to the DAA on 29 February 2020 indicated progress had been completed on the employee annual review plans in line with “MOH Staffing 6 Monthly Review Plan”.

**3) Evidence:** Review of performance appraisals show appraisals have occurred for all staff employed over one year.

**4) Suggestion:** None

**Outline of requirements and recommendations:**

**Number of Requirements made 0:**

**Number of Recommendations identified in Evaluation Reports 21:**

Review Home Agreements (x 7), align practices with EGL Principles (x 5), Improve Communication (x 5), follow-through with consultation, review staffing hours.