

An Independent Evaluation of Standards and Monitoring New Zealand (SAMS)

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Some Significant Strengths of SAMS

- **A Strong Positive Value Base And A Commitment To Act On These Values**

On one level, SAMS was founded to establish an innovative approach to evaluation. In fact, after many decades of work, SAMS is still known principally by most people in New Zealand for its evaluation work. In reality, SAMS has diversified its work considerably from the days in which evaluation was its principal or “core” business. Nonetheless, SAMS has since its founding acted as if its “core” business has been something more along the lines of values based leadership to improve the lives of people with disabilities. In this regard, evaluation was *simply a means to this end* of people with disabilities being able to enjoy good lives.

This abiding interest in influencing change for the better in New Zealand has not been taken up by SAMS as an advocacy or campaigning initiative revolving around advancing a specific ideological framework. Rather, it has taken the form of what might be called “influence strategies”. The ones most used by SAMS fall into these following categories:

- Education and training initiatives
- Developmental evaluation
- Agency transformation
- Publications and research
- Special change related projects
- Alliances

These “influence strategies” are all a “means to an end” that are meant to create conditions favourable to the task of people with disabilities and their families obtaining improved life conditions. Though SAMS is not specifically associated with a given type or types of life improvement such as supported employment, expanded social networks, “home of one’s own”, self-direction etc., it has long had a broad interest in what could be better for people with disabilities and has drawn inspiration from many kinds of specific developments that have advanced the quality of life of people with disabilities, both in New Zealand and abroad. In this regard, its overarching value was not to advance a specific type of practice, but rather the promotion of thinking and practices that would enable people with disabilities to have full and satisfying lives. The transcendent aim of its work has been the desire to be part of the collective leadership process in the sector to ensure that life got better for people with disabilities.

This concern to ensure that people with disabilities in New Zealand had increased prospects going forward for a richer life has led SAMS to gradually develop more complementary kinds of “influence work” that would improve the ability of SAMS to exercise leadership on such matters proportional to its capacities. Undoubtedly, this positive value of taking action to influence change for the better in people’s lives has not always been easy for SAMS, but it has held to this aim with remarkable steadfastness over three tumultuous decades in New Zealand that have been full of many challenges and difficulties, but also very fruitful advances in what can be expected in the lives of people with disabilities.

In this regard, *what SAMS does* in any instrumental sense seems less important to both SAMS and many others than *what it is that SAMS stands for*. SAMS in this regard, has not changed in what most deeply motivates it and gives SAMS purpose. However, what it has chosen to highlight over the years has evolved considerably in its thinking about what constitutes “the good life”, much as the broader sector has also shifted in its thinking and approaches as has the international movement for better life opportunities for people with disabilities. Its’ stated values are numerous, instrumental and applied but they are all subordinate to the overarching aim of people obtaining a good life. See “What We Believe” <http://www.sams.org.nz/what-we-believe/>

- **The Expansion Of The “Influencing Of Change” Roles Of SAMS**

SAMS now has multiple pathways to influence change that have evolved gradually over the years, but which have now also proven to be both viable and sustainable over time. As indicated earlier they are;

- **Education and training initiatives** i.e. Partners Influencing Change training, family development training i.e. enabling good lives training, customised staff training, family/whanau/carer support courses etc.
- **Developmental Evaluation** i.e. its historical role of contracted independent evaluations involving people with disabilities and families as team members, with the Ministries of Health and Social Development as well as a variety of “specific request” evaluations
- **Special change related projects** i.e. Project Utopia, Enabling Good Lives, Tuhana etc.
- **Agency Transformation** i.e. a package of SAMS interventions including customised training, developmental evaluation, coaching and mentoring and measuring progress and outcomes
- **Publications and research** i.e. occasional studies and publications
- **Alliances associated with change** i.e. Enabling Good Lives, Alliance for Family Leadership etc.

These strategies are directed at quite different targets e.g. agency staff, families/whanau, agencies, various allies, but taken together, they constitute a sizable number of people being influenced by SAMS in any given year. There is also the additional factor that many of the investments that SAMS has made in individuals, families/whanau, agencies and alliances would have cumulative impacts over time in ways that “one off” investments cannot normally generate, except insofar as they are followed up on with reinforcing investments subsequently. SAMS long tenure in the sector has given it both a special standing and respect, but also an institutional presence over decades that has deepened the relationships, alliances and commitments it had begun many years ago, while continuously drawing in new people.

It is striking to think about the number of people now attending or participating in some sort of SAMS function who were not even born when SAMS began its work many decades ago. This also

points to a new dimension of SAMS' existence and that is that it is now entering a period where it is spanning the baby boom generation, Gen X and Gen Y and now the Millennial generation which is currently larger in overall size compared to the baby boom generation. The generation of the baby boomers had until recently been the largest demographic cohort in many western countries.

- **Sustained And Targeted Support For Family Interests, Needs and Leadership**

The comparative investment by SAMS in family related education and leadership relative to earlier periods indicate a sustained expansion of offerings and family involvement. The carer support and family development courses have taken hold to the point where they are now routine offerings by SAMS much as the Partners Influencing Change courses have become so established that they have been a regular event for over a decade. These strategies of support for families, as demonstrated in a mix of education and support options, are by no means comprehensive in nature, however, they do represent a notable degree of fidelity to families over a lengthy period of time.

These programmes also represent an investment in family vision and capacity to play a catalyst role in their family member's life in the direction of better life opportunities. This is consistent with SAMS' long term interest in people with disabilities getting more enriched life possibilities, but it also has the advantage of reducing the isolation of families, educating them about strategies and resources they can use in practical ways, linking them to other families for sharing and support and generally providing affirmation, encouragement, perspective and inspiration. Though there are limits to what SAMS can do by way of support, these measures are not in themselves insignificant, particularly if they become part of ongoing investments in families. Even the creation and sustaining of "kitchen table" networks is evidence of what has borne fruit from these efforts.

- **Continued Support For Roles For People With Disabilities And Families In Developmental Evaluation**

It has been a distinctive feature of the SAMS approach to developmental evaluation to have both people with disabilities and family members in the role of evaluation team members. In fact, this practice is still comparatively rare internationally and while it was innovative over 30 years ago, it still remains innovative in the present era. It is to SAMS' credit that it has persevered with this commitment even in periods of difficult times for SAMS. Also significant is that the roles are not symbolic at all, as the competency demands on team members are sizable and real. Hence, not just any family member or person with a disability can expect to do the job. Just those that can demonstrate that they are qualified or could become so are going to be acceptable to SAMS. Hence, the role is quite substantively performance based and not token in nature.

- **The Packaging Of Multiple SAMS Supports In "Tailor Made" Agency Transformation Packages**

In recent years SAMS has advanced in its strategic "bundling" of SAMS supports into bespoke "packages" of supports for agency transformation assistance. These normally include a mix of customised training, developmental evaluation, coaching and mentoring and measuring progress and outcomes. In this regard, SAMS has moved into agency change work in a more strategic and

comprehensive way than had been the case beforehand. It may be too early to assess what has worked well in this regard, but certainly SAMS has added a new formulation of its role of influencing change by combining already existing roles into what might be considered an agency change consultation “product”.

There are, of course, many variations of possible “agency transformations”, so it is adaptive that SAMS is prepared to adjust its mix of supports to suit the specific developmental and change needs of a given agency at a given moment in time. Equally, these interventions may change as the agency progresses, as what is done initially can set the stage for subsequent interventions by SAMS that might look a bit different from what was attempted at an earlier stage. Hence one “bundle” of SAMS involvements with an agency may be followed by a somewhat different bundle given the evolution of a given agency’s needs over time.

- **The Depth Of Experience, Competency And Familiarity Of SAMS With The Sector In New Zealand**

SAMS has accumulated many decades of experience with conditions in the disability sector in New Zealand, and thus has all of the advantages of a long history of involvements at many levels with the sector. This includes, in an overall collective sense, possibly thousands of personal relationships, countless developmental evaluations, multiple consultations and collaborations and innumerable discussions on every relevant topic that the sector has been engaged with. These are only a few of the many aspects of SAMS experience that has been built over the years.

This is, on the one hand, a difficult to define capacity of SAMS that has arisen and accumulated over more than a generation of time. Nonetheless, SAMS has standing in the sector as a long term contributor, as well as a resource that has many potential benefits that can be tapped into. It would be evident to many of SAMS’ colleagues in the sector what all of this accumulated experience might mean, and so it is conceivable that SAMS could find further ways to usefully draw upon its many decades of work much as it has done so already.

It is also true that the demographic of the majority of the people now working for SAMS is nearer to the end of their working life than the beginning and this will mean that at some point soon others will need to fill their shoes. Consequently, does the experience gained by SAMS disappear at that point or are there strategies to maintain some kind of continuity of this capacity? This is of course a sector wide question due to the demographic realities of the moment, but it speaks to the question of preserving that which has been built over many years.

- **Good Governance And Financial Management**

It is notable that for most of the years that SAMS has been in existence, particularly in the last several decades, SAMS has existed on what many might call non recurrent “soft” monies. Increasingly, this has meant year-by-year uncertainty as to what amounts and types of monies would be in hand in the next financial year. Nonetheless, SAMS and its staff have adjusted to living with these and other financial insecurities and have performed well despite the challenges they pose for SAMS. Further, SAMS has been prudent in its spending, careful in its advance planning

and frequently successful in producing a sufficient fund balance to somewhat cushion whatever unexpected contingencies may arise on a year-by-year basis.

Obviously, from a governance point of view, the board of SAMS has carried its fiduciary responsibilities well and this responsible management of finances has been to the benefit of the organization, its staff and the many people outside SAMS who rely on it for support. This track record addresses the question of the persistent quality of its performance on the many bits of work that it has undertaken, as SAMS has also maintained the confidence of the people who contract with SAMS. SAMS currently has a specific plan each year for board development and has done this for some time. Governance matters are often not given enough attention by non-government organizations, as good governance can have significant benefits for an organization. SAMS has tackled this well by ensuring it has a board development plan in place and operationalized each year.

Maintaining a track record of good performance as well as responsible stewardship of the organization's assets and its work is a considerable accomplishment given the climate in which its work must get done. The evidence that they have managed this well is very clear in terms of their track record of generating meaningful work, performing to expectations and prudent stewardship of money and other human resources. It should also be noted that the rather intentional diversification of funding sources that SAMS now taps into has provided SAMS with a much greater degree of flexibility and resilience in the face of the many uncertainties in the current funding environment.

- **The Gradual Engagement Of Culturally Suitable Solutions To People's Needs**

Though SAMS has long engaged with major cultural groups in New Zealand such as Maori and Pacific Island peoples, it is noticeable that SAMS is attempting to do more to engage and support people from other distinct cultural heritages. This has often been informal in nature, but on occasion it has taken the form of specific initiatives such as the production of culturally appropriate materials, specific initiatives with distinct groups such as families with Chinese backgrounds, the attempt to use resource people from diverse backgrounds, having cultural minorities in board and staff roles etc. While none of these steps are unusual in the New Zealand context, it provides something of a base that can be built on in coming years. It is also true that SAMS has recently experimented with an internship programme in relation to its developmental evaluation work that has already provided a pathway for the development of new contributors to SAMS work.

- **A Pattern Of Working Adaptively Within Alliances**

In both an informal and formal sense, SAMS has developed a pattern of working with other organizations with which it shares common values and interests. To mention just a few this has included People First, Parent to Parent, Imagine Better, Enabling Good Lives, DPA and many service providers and NZDSN, Inclusive NZ to name just a few. These are not alliances for alliances sake, but have arisen because working together offered advantages that would not otherwise be accessible. In this regard, the alliances are strategic and pragmatic and are focused on specific agendas. As in all alliances, the mix of interests and agendas are not entirely in concert with the ones that SAMS has entered into, but on balance the advantages outweigh the challenges involved. One of the advantages of alliances is that they provide SAMS with allies and partners that

bring many resources and capacities that SAMS would not normally be able to either access or develop for themselves. Hence, these alliances serve to extend the capacities of SAMS and help create options for moving ahead that would not otherwise be feasible for SAMS acting alone. They also pave the way for potential future alliances built on the ones that have already been tried. Further, they generate substantive experiences of what is required to successfully work in alliances.

- **The Dominant Presence And Partnering Of People With Disabilities And Families On The Board Of SAMS**

It is notable that SAMS has, for the length of its existence, tried to emphasize the central importance of the direct voice of people with disabilities and families in all matters of importance to the organization. This was a radical advance at the time and might still be considered admirable and quite unusual at present given how few organizations actually live up to the demands of such a policy in practice. The balance between families, people with disabilities and allies has varied over the years and in 2015 half of the board is composed of people with disabilities and allies and families equally divide the other half. SAMS has pioneered such an adaptive and respectful partnering between families and people with disabilities even at a time when tensions between families and people with disabilities has meant that each went their own way and formed their own groups. SAMS has avoided such a schism by operating on the belief that both can work effectively together, and has done so consistently for the entirety of its existence.

- **A Pattern Of Seeking Regularized Independent External Evaluation Of SAMS**

It is notable that SAMS has quite regularly sought formal independent external evaluation of its overall work and has done this entirely at its own cost. It is uncommon enough that organizations in the sector do this that attention needs to be drawn to the fact that SAMS has done this so frequently over the years. In each instance, SAMS has sought critical appraisal of its work and invited recommendations to address any matters raised by these evaluations. It is also striking that an organization that has itself evaluated so many services has asked that it be similarly evaluated. It should also be noted that SAMS has followed up on many of the recommendations given.

The Achievement Of The Overall Mission And Vision For SAMS

What follows below is the official summary of the vision and mission of SAMS as posted on its website.

Vision: *For disabled persons and family/whanau 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.*

As has been indicated already, SAMS has seen itself as fundamentally a catalytic organization in terms of contributing to values based leadership in terms of the life possibilities and needs of

people with disabilities and their families. In this regard, SAMS has set as its mission the uses of various means to *“effectively enable people with a disability and their families to participate in the creation and maintenance of high quality disability services in New Zealand.”* In regards to the use of various means to (positively) influence the life possibilities of people with disabilities, SAMS has gradually expanded its mix of “influence strategies” and will likely to continue to do so.

So, SAMS has stayed faithful to the task it has set itself in terms of being a catalyst for enabling useful changes to arise in support of people with disabilities. One of those strategies has been service evaluation and SAMS still remains quite unique in using a methodology that relies on the use of skilled people with disabilities and family members as formal service evaluators. To its credit, SAMS has experimentally and incrementally gradually expanded and evolved its influence strategies. So, in terms of staying true to its vision, SAMS has been both very conscientious and pragmatic, as conditions have not always been favorable for SAMS to branch out with, and sustain new initiatives.

The overarching intention of SAMS has not been to expand influence strategies for their own sake, as it has placed in its mission and vision a very strong qualification i.e. that these strategies should be tested against the standard of whether or not they help make a meaningful difference in the lives of people with a disability. The original terminology used was *“effectively enable people with a disability and their families to participate in the creation and maintenance of high quality disability services in New Zealand.”* Whereas today, SAMS might emphasize much more the quality of *life opportunities* for people with disabilities, rather than the outcome being sought being *“high quality disability services in New Zealand”*. In this regard, the wording of the mission and vision should be updated in the interests of clarification, so as to not too simplistically conflate high quality lives with high quality services. Nonetheless, service quality and models of service are a contributing factor in whether people with disabilities are able to enjoy gradually improving life opportunities.

Another distinction that may bear deeper scrutiny is not only the presence of expanded influence strategies, but also whether these strategies are effective and beneficial or could be further evolved and improved or possibly be entirely replaced with yet other more impactful strategies. Given that SAMS will likely always face limitations on pursuing any mix of influence strategies, it will need to show considerable care in evaluating whether a given strategy is generating sufficient impact in order to justify its continuation. In some instances, the address of this question will revolve around whether there are any viable alternatives and what might be the challenges involved in switching from one strategy to another.

For instance, SAMS has already updated its former Partners in Policymaking approach to the new Partners Influencing Change approach based on the belief that the new approach could generate many of the benefits of the former, but be more impactful and manageable overall. This evolution was based on a careful weighing of the costs and benefits of staying with the original (US) formulation or developing a “made in New Zealand” approach. Even so, the ongoing critical evaluation of existing influence strategies used by SAMS could conceivably be pursued in a more systematic way if SAMS were to periodically assess the costs and benefits of each strategy more formally, so that the comparative effectiveness of the strategies being used could be more formally assessed. Many organizations who do similar things typically assemble some kind of creative “brain trust”, take a look at what has been achieved and try to appraise whether the strategy could be improved in any way.

Much of this may depend upon somewhat more than a cost benefits analysis, as it may not be evident to the people involved that there might be an alternative way to generate a better option. This in turn may be influenced by whether those involved have done some research on such alternatives. Much as SAMS has been operating in many innovative ways for decades, much of that may not be evident to people unless they had somehow come across SAMS. Hence, the scanning of similar influence strategies internationally may be helpful, as it could generate some indications of potentially alternative approaches or even features of approaches that should be examined more closely. Much of this work could be done by SAMS using its current networks better to identify promising possibilities as well as expanding those networks more deliberately by recruiting people overseas who could give SAMS a sense of what might be beneficial to look at more closely.

International Comparison

How SAMS frames and conducts evaluation is still well ahead of the game and is to be congratulated on its approach. Evaluation continues to be done commonly by tick the box or third party verification internationally. From a large study on evaluation, coordinated across Europe, there were very few countries that were using an approach that involved families and people with disability. There has now been some movement in the UK to involve people with disability as partners, for example, Quality Checkers run by Choice Support. This is where a person with a disability and a non-disabled evaluator use a set of standards to visit organizations to check on quality. Choice Support has a large government contract to train people in this methodology. <http://skillsforpeople.org.uk/?q=what-we-do/quality-checkers>

The SAMS approach to evaluation stands alone as an excellent example of enabling the voice of disabled people and families to lead the way in this area. It is for this reason that in the report there is a recommendation that your work (approach insights methodology) be made more available both in New Zealand Australia, and internationally so that evaluators in this area can see the value of involving people with the lived experience of disability.

Some Key Challenges For SAMS

- **The Expanding Role Of SAMS And Defining Its Identity**

SAMS had began its work many years ago principally focusing on its evaluation work. As time has passed SAMS has expanded its offerings to include other roles such as are described on its website under the tab of “What We Do” as being:

- Developmental evaluation
- Service transformation
- Customised staff education
- Family development-Enabling Good Lives
- Partners Influencing Change
- Family/whanau carers
- Special projects

This growth in these various aspects of SAMS' menu of roles and offerings has occurred gradually and has largely evolved from previous roles and functions that SAMS had pursued. In this regard, the evolution of SAMS has proceeded via incremental extensions of previous SAMS work. These expansions took place as a response to both unmet needs perceived by SAMS and others, and the feasibility of engaging such needs at that moment. Consequently, these expansions were not driven by a desire or policy of SAMS to expand, but rather these came about from the logic that SAMS could contribute usefully and that such a contribution seemed viable at the time. In other words, there was not in place at that time, or at present an explicit *a priori* strategy relevant to SAMS' long term mission that determined that SAMS and its mission would benefit from such expansions. Each increment was consciously studied by the board of SAMS and subsequently authorized principally as operational projects rather than part of some kind of overarching policy agenda, and identity as SAMS.

Consequently, it would be timely for SAMS to examine this pattern of programmatic evolution from the perspective of these expansions being individually and collectively significant changes in the identity and role of SAMS. It is notable in this regard that the staff and family training/education function of SAMS in 2014 was a sizably larger portion of SAMS overall revenue (49%) than its revenue from evaluation work (44%). In other words, the expanded portion of the work of SAMS has now eclipsed the former dominance of its historical evaluation work. This shift has occurred gradually and may not have any long term significance upon closer examination. Nonetheless, in the spirit of the precautionary principle (see below) it http://www.precaution.org/lib/pp_def.htm would be useful for SAMS to examine several important aspects of this evolution.

This intent to see whether SAMS should update its understanding of its core purposes, role and identity may also be of interest to many parties outside of SAMS, given the extensive web of networks that SAMS exists within and has done so for decades. If so, then dialogue with the external "base" or constituency of SAMS may be informative for the board, as it would draw upon how others see SAMS as opposed to how SAMS sees itself. The timeline of such an exploration is not urgent in any sense, as this proposed examination constitutes a more deliberate and reflective exercise of taking hold of questions that are ultimately definitive in nature, but may prove to be hard to define without some careful examination and analysis.

- **Addressing The Generational Changes Facing SAMS In Coming Years**

As has been indicated, there are sizable demographic changes underway in the broader population of New Zealand with two interrelated changes being predominant in the coming period of transition. The first is the aging of the "baby boom" generation and the second is the anticipated replacement of them by younger generations i.e. Gen X, Gen Y and the Millennial generation. Note: People born between these years roughly constitute the present generations in the populace, though such divisions are inevitably a bit arbitrary. These are the "Baby Boom" generation (1946-1964), "Gen X and Y" generation (1965-1979) and the Millennial generation (1980-2000). It is notable that in the western world the Millennial generation is now measurably larger in terms of absolute numbers than the formerly dominant in size "Baby Boom" generation.

The significance of this discussion of generations is that the transition of “Baby Boom” generation individuals out of the workforce *is already underway*. This demographic process has been slowed to a degree by the Global Financial Crisis and its continuing economic impact. The key impact being the incentivizing of “Baby Boom” era employees to remain at work longer. Nonetheless, this somewhat delayed transition will inevitably both impact on SAMS and the constituency organizations it now deals with in the sector, including government ministries. For SAMS, it is obvious that its workforce is heavily concentrated in the generation that will likely at some point in coming years leave the workforce, at least on a full time basis. For SAMS, this means the potential loss of the experience base of these individuals and the need to replace such persons with a much younger workforce on average. This task in turn will require that SAMS have a strategy about how it is going to manage this transition.

The advantages of being proactive are that one can shape events to a greater degree than if one waits and becomes increasingly hostage to what is already in place and may be irreversible. In this sense, does SAMS want to create an orderly process for managing this transition if this is possible at all? To its credit, the recent effort by SAMS to create an internship programme is an instructive attempt by SAMS to take up some of the challenges in forming a new generation of workforce, at least in its evaluation work. It is also instructive because the individuals recruited for this exercise have come from both the Millennial and Gen X/Y generations.

Some questions that might arise in this regard are questions such as whether it would be possible to find ways to transfer some of the experience and seasoned insights and values of the present workforce to the emerging workforce so that these advantages are handed on in a form that ensures their continuity, at least to some degree. In other words, could SAMS create a “bridging” strategy between the departing workforce and the emerging one. This could include how they are recruited and selected, how they are oriented, how their jobs are designed, how they are mentored and supervised, how they are supported to potentially make a career or at least a long stay at SAMS and how they are inspired, renewed and engaged as a routine matter.

Another question would be the development of some criteria as to what sorts of people might be optimal for future recruitment. This would necessarily involve a consideration of the desirable qualities of people that would optimize certain roles, as well as what might be thought of as “SAMS wide” optimal qualities of a more general nature that would be a good fit with SAMS.

For instance, there has been an emerging body of studies that show that modern workplaces have changed from earlier periods and that the orientation of younger generations to work has shifted to some degree. See:

<http://www.forbes.com/sites/jacquelynsmith/2012/09/13/how-millennials-work-differently-from-everyone-else/>

<http://www.halogensoftware.com/blog/generation-y-understanding-the-work-habits-of-millennials>

Obviously, these are simply illustrations of the issues that are emerging and they may not have immediate meaning for SAMS at the present moment but, the questions themselves may still be important to consider.

A third question that may be relevant is the kind of organizational structure, technologies and patterns of work that may be most relevant in coming years. As SAMS has already discovered with its own experimentation with models of operating, there may be approaches that work better under new conditions. Obviously, it will not be easy to imagine what these might be, but SAMS has

considerable experience with “early adoption” of innovations, both in the sector and in regards to its own organization.

A fourth question may revolve around the growing interest in SAMS to reach out and engage with both major and minor cultural groups within New Zealand society. New Zealand has had a long history of biculturalism in its population and in recent decades this has come to include a wide range of unprecedented multicultural migration. In fact, the largest cultural group in the Auckland region is now people of Asian descent. Though not a homogenous group, they are representative of whom in the future in New Zealand will have children with a disability and thereby become a “next generation” of families as well as people with disabilities speaking for themselves. It is hard to predict the specific cultural context that will create, but most certainly it will mean its own set of challenges for themselves, for educators and service providers and more broadly generic community services and organizations.

The implications for this kind of long-term trend of multiculturalism for the working patterns of SAMS, its workforce, its projects, its alliances and its priorities are not specifically known at present, but SAMS has already examined these kinds of questions in terms of Maori and Pacific Island communities and has in recent years taken the initiative with at least some Asian communities in New Zealand. It is notable that in other multicultural societies that it is common for family leadership types of courses to include simultaneous participation and language translation for the multiple cultural groups present. It has also led to the creation of disability services explicitly set up to support people within their cultural context and language. Obviously, that would have implications for SAMS’ work in developmental evaluation, agency transformation concerns, staff training, self-advocacy and all other activities providing that SAMS continues its conscious efforts to support people not only in regard to issues related to disability, but also to needs that arise from their cultural and linguistic identities.

- **The Current Character Of SAMS’ Approach To Staff Supervision And Support**

The occasional national gatherings that bring staff together each year most certainly highlight the opportunity to catch up with others and learn about what they are doing. However, these days have their own limitations that act to limit the benefits of time together. First, the programme is usually heavily weighted to information sharing in nature and does not specifically encourage discussion, networking and relationship. While it does provide a very real opportunity to share much useful information, it does not tend to emphasize the discussion, analysis and appraisal of this information. Particularly absent is any attempt to collectively engage the staff in raising, addressing and building some kind of consensus view on shared or common issues that may be vital in some way to SAMS overall. Hence, a great deal of specific content is addressed, but very little “big picture” questions get taken up. This tends to underline for staff that their role is principally functional in isolation of contributing to the strategic overall direction of SAMS.

This gets to the question of the primary purposes that are served by these occasional national meetings of SAMS, and how this may have changed over the years. At one point in SAMS’ history the national meeting was in many ways comparable to the project work group meetings of today in that everyone involved was working on a similar task i.e. evaluation. Not surprisingly, given the shared task, the meetings were seen comparatively in more satisfactory terms. In the present period, there is no single shared task that provides a common “*raison d’être*” i.e. reason or purpose

for being, as the various influence strategies now used by SAMS are now more numerous. This has the effect of introducing multiple work and personal agendas that are not shared, so it should come as no surprise that the national meetings would produce some dissatisfaction, given the inevitability that a single meeting cannot meet such a diversity of needs. This is in contrast to the current project work groups that have the advantage of smaller numbers, and more in common amongst participants given their shared work.

Returning to the question of what might be the best use of occasional national meetings; it necessarily revolves around whether a common beneficial purpose exists for bringing people together. Since, work focus is no longer held in common, at least in terms of specific change influence strategies, then it is necessary to look elsewhere. In respect to this, what is held in common by all of the influence strategies is the values based leadership component of their respective influence strategies. In other words, the common purpose of enabling people with disabilities and their families to have improved life opportunities. This potentially can mean any aspect of enabling good lives could be taken up by SAMS as the focus of a national meeting as long as it involves values, leadership and distinct challenges in obtaining good lives such as social inclusion, empowerment, social attitudes, home life, relationships and so on. Being aware of what might constitute the “leading edge” in any aspect of life would have meaning and some relevance for all of the project work groups.

If staff are seeking guidance, direction, administrative assistance, monitoring or consultation from SAMS they generally indicate that Mark Benjamin and Maureen Steed are reliably accessible, responsive and helpful. It would be accurate to say that much of the staff support functions exist on a “personal request” basis. This may be adequate much of the time, but there may be needs or issues that arise that do not get raised simply because there develops an unstated expectation that staff are expected to manage whatever arises themselves. If that becomes a “given” then many potential requests will simply not be made.

The advantage of the flexibility and informality of an organization such as SAMS is that it enables SAMS *to not have to rely* on a rigid bureaucratic formula for supervision and support. What it offers instead is the possibility of a formal requirement for regularized supervision and support, but with the option of being able to vary what occurs by way of supervision and support with each staff or contractor on a person-by-person basis. In other words, that supervision could conceivably take the form of a “co-production” process providing SAMS establishes as explicitly as possible what it expects from supervision.

Nevertheless, rather than SAMS imposing a “one size fits all” mode of supervision, there is scope for a relatively flexible but regularized approach to supervision and support. Staff highly valued contact with the Chief Executive, that could be enhanced if in turn he was able to delegate some aspects of his role to a Deputy.

- **The Question Of Carefully Appraising The Essential Yield Or Benefit Of SAMS’ Training, Consultation and Evaluation Work**

SAMS has evolved a variety of strategies to influence the quality of service and life opportunities experienced by people with disabilities. In this, it has conducted a large number of evaluations,

trainings and consultative contributions. Its alliances based work is also pertinent, as it is often in place when other work is being attempted. Nonetheless, there are no specific strategies in place that would help distinguish and validate for SAMS what the specific yield or core benefits of this work are and are not. If you like, what is the core beneficial “product” of SAMS in outcome terms. At present, there are often not in place either qualitative or quantitative measures being taken to define what has or has not been accomplished by the various interventions of SAMS. Consequently, SAMS would have difficulty defining what it has done that has had beneficial outcomes and what has not. Assessing both of these outcomes is important, as it would indicate what needs to be emphasized and built upon going forward and what may need to be let go as not adding any significant value.

At present, there is the use by SAMS of testimonials and other endorsement type contributions of this kind i.e. “what people say”, but generally these sorts of measures are not given great weight in terms of people or organizations seeking validation of the value of a given strategy or approach. What would be notably more useful would be something that includes the views of those involved of their experience, but that goes beyond those specific appraisals to an evaluation of the outcomes that is done by disinterested third parties who are independent of the experience being studied, as well as having no relationship with SAMS itself that might conflict their role. Even internal research done by SAMS would still be problematic, as such “in house” research is not being conducted by independent reviewers, even if it is methodologically sound and otherwise valid.

This is not an easy challenge to take on, as the work of SAMS is quite varied and SAMS would have limited resources to devote to it. Nonetheless, there may be ways to organize such evaluations to be done that highlights and documents some of the probable strengths of the SAMS approach. In this regard, SAMS would have to ask itself what findings it suspects could potentially be independently validated. In this regard, given their possible independent verification, the endorsements are not meaningless, but would be more powerful if they triangulated positively with other independent evidence.

The challenge is to find a way to engage independent evaluators at minimal cost to SAMS. This may be possible by finding monies that do not come from SAMS, but are directed at research and evaluation that is concerned with the issues SAMS has addressed. There may also be a way to use graduate students to conduct small studies within the scope of their masters or PhD academic work. A third option could be the diversion of some of SAMS fund balance to evaluations or studies conducted by independent, external and competent evaluation researchers. Alternatively, SAMS could enter into partnerships with other well respected evaluation groups that wish to research the value of developmental evaluation Both national and international funding grants could be applied for to cover a participatory approach to document the added values of both developmental evaluation and the other work of SAMS.

There are a great number of potential questions to examine and SAMS would have to narrow these down to the programmatic areas of its work that are fundamental to its mission. Some typical

questions immediately come to mind such as the following *illustrative, but most certainly not exhaustive questions*:

Re: Evaluator Role & Persons With Disabilities & Families

- What has SAMS learned about what it takes to support at least some persons with disabilities, and families in the evaluator role?
- Given the specific challenges of the evaluator role what are the characteristics of the persons who are suitable or not for the evaluator role?
- What specific added value is potentially brought by persons with disabilities and families to the evaluator role, and evaluation outcomes?
- What do people with disabilities and families typically gain from being in the evaluator role?
- What are the typical resistances to the presence of people with disabilities and families in the evaluator role, and how are these best addressed?

Re: Investments In Families and Family Leadership

- What has been most helpful to families, in their view, from SAMS investments in family education and how enduring are these benefits?
- What investments have been of minor or major benefit to families and why is this so?
- To what extent do multiple sequential investments in the same family prove more beneficial than isolated “one off” investments?
- Does having families deliver part or all of the educational content add value to the outcomes and why might that be?
- To what extent do SAMS family educational benefits do better when linked to families being networked with other families i.e. is the educational benefit strengthened or not by the networking?

Re: Agency Transformation

- What specific agency transformation outcomes correlate with SAMS’ agency transformation investments?
- Which of the various SAMS agency transformation investments has the greatest impact on specific agency transformation outcomes?
- What duration is required in terms of SAMS’ agency transformation investment to generate specific transformation outcomes?
- What are desirable complementary agency investments that help increase the yield or impact from SAMS’ agency transformation investments and why is this so?
- What agency transformations have proven the most challenging for SAMS and why might that be?

Obviously, these questions are merely suggestive in terms of an initial attempt by SAMS to clarify what it might like to document and validate as being core to its work. These questions are directed to the categories of work that SAMS uses to describe itself and its work. It is also true that SAMS does not specifically highlight its long term “values leadership” role, but this might also be something that SAMS may want document and validate. Such approaches to research would build

upon SAMS history of doing research with new emphasis being placed on winning external funds in partnership with other groups that have a history of publication and profile in the area of evaluation.

Strengthening Board Governance For The Next Generation Of Work

The coming generational change in the sector is a significant one as the various social movements that have driven the disability sector are now entering a period of significant change in their leadership. The leadership of SAMS' board and staff has been shaped by a demographic cohort that will presumably be replaced by a younger cohort at some point soon. SAMS has been fortunate to have had good governance over many years and has both survived many challenges and evolved in its own development. Much of what might explain the strengths of SAMS' governance board over the years has been its care in recruiting the most suitable board members and the investments made in equipping them to address the vital needs of SAMS' work. These tasks will be just as important going forward as they have been in the past.

The work of SAMS does not exist in a vacuum, as its enduring relevance rests with its perceptive engagement of the evolving needs of people with disabilities and their families in the context of New Zealand society and the New Zealand service system. It is notable that many of the developments in New Zealand society itself might never have been imagined when SAMS was launched over three decades ago, as New Zealand society has not stood still. Similarly, the service system as it is today would have been inconceivable to people in the sector at the time of SAMS' founding. In all likelihood, that will be equally true three decades from now, as it is impossible to know now what the issues will be at that point in time.

Nonetheless, it is in the nature of both leadership and organizational governance that the aims and measure taken to steward an organization such as SAMS will undoubtedly need adaptation as the external environment changes, both in communities and in the realm of services and their systems. Hence, both the selection of the most suitable board members for SAMS and investments in their capacities need to be significantly influenced by what the mission of SAMS should be, given the emergent conditions of life being faced by people with disabilities and families, and what needs might arise from these conditions.

Several obvious implications arise from these observations. The first is that SAMS should continue to examine its mission and whether the tasks it has set for itself are significant enough in the new environment that it may find itself in or whether it may need to amend these in order to preserve the relevance of its role (s). It is a truism that many organizations fail to do so and thus their importance and impact wanes in the new environment and they become ineffectual and dated. SAMS has adjusted in the past and its programmatic commitments reflect such an evolution. The question will always be whether SAMS has evolved itself enough so that it continues to meaningfully engage the issues of the day.

The second central issue is whether the board has the capacity to make these crucial determinations both in terms of the people selected to be on the board and what support they have to strengthen their capacities to provide decisive leadership and stewardship. Typically, this issue is addressed both by who is on the board and what kind of advice and learning opportunities they get to take advantage of in regards to key resource people in the broader sector or opportunities

that might be significantly developmental for the board relevant to its governance and leadership functions. As has been indicated earlier in this report, SAMS has attended quite carefully to board selection and board development and this has proven to be beneficial.

The third issue is the kind of ongoing nurturance and renewal the board might need in order to maintain its effectiveness and leadership. This can vary from one period to another, as the specific aspects of renewal they may need will depend upon what challenges that they are engaged with at a specific point in time. Consequently, investments in nurturance and renewal may need to be updated as the needs of a given board change, and what might have been helpful at another juncture is irrelevant at another. Again, this aspect has been addressed in the board development plan.

The area that may need further work is finding more occasions to draw upon the other leaders and allies in the sector in helping SAMS work out how it will move ahead with its work. This would mean to invite people to assist SAMS in its strategic and developmental challenges, by drawing upon the skills and strengths other significant contributors in the sector. Much of this takes place informally at the moment, but there can be value in more formal occasions to think together both for its enrichment of the thinking, but also the effect it can have in strengthening existing alliances and in safeguarding the thinking that does evolve. It also adds a dimension of accountability and transparency which is itself a key safeguard.