



A Developmental Evaluation Report for Supported Independent Living Services

Contracts: Supported Independent Living Services

Provider name:

Tautoko Services Charitable Trust (Tautoko Options), Nelson.

Disability Support Services



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General information

Developmental Evaluation report based on the general Provider Quality Specifications and Service Specification – Supported Independent Living (DSSL 2620), October 2004. Confidential to DSS, MSD. Subject to the provisions of the Official Information Act 1982.

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Final Version	Developmental Evaluation Report for the Disability Support Services in the Ministry of Social Development Developmental Evaluation of Tautoko Options, 1 Braemar Place, Nelson	Evaluation
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Locality:	Nelson	Service Type:	Supported Independent Living		
Provider Number:	161639	Name of Service:	Tautoko Options	Legal Name:	Tautoko Services Charitable Trust
Venue for Evaluation:	1 Braemar Place, Nelson 7010	Postal Address:	1 Braemar Place, Nelson 7010		
Date of Evaluation:	12-14 August 2025	Contract No.:			
Description of Clients	Seventy-six People living in the Nelson region currently access the Supported Living service offered by Tautoko Options.				
Facility Liaison Person:	Marie Calderbank	Designation:	Service Steward		
Date Evaluation Report Sent:	26 August 2025				
Date Evaluation Report Signed Off:	4 September 2025				

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Evaluation Team Members:	Lisa Willey and Peter Wilson	
Report Prepared By:	Lisa Willey	
Findings:	Number of Requirements: 0	Number of Recommendations:

Developmental Evaluation Methodology

The evaluation utilises the Ministry of Social Development Evaluation Tool based on the Provider's National Contract (DSS 1031) and the New Zealand Health & Disability Sector Standards. The evaluation aims to provide information about service practices and the quality of life of People using services. It identifies positive and innovative approaches occurring within the service, and provides a catalyst for ongoing learning and continuous improvement. This evaluative approach will include the perspectives of a range of stakeholders and take into account wider influences within the community and the health and disability sector.

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Executive Summary

Tautoko Options has recently moved to a self-managing teams organisational model. The Nelson regional service is made up of a Service Steward, four Service Coordinators and 15 Support Workers. The team meets weekly, smaller person-centred teams meet regularly, staff meet with Service Coordinators for coaching and there are strong collaborative connections across the service. A reflective approach is evident.

Tautoko Options values are expressed in the Te Kauri model are prominently shared with People and staff. We noted many examples of practice aligning with values. Information provided to People in the Welcome Packet includes an Easy Read “Welcome Booklet” that contains comprehensive, accessible information about what they can expect from Tautoko Options and their staff. Throughout the evaluation service information was consistent across documentation and feedback from People, families and staff. Person-centred thinking and planning is central to service delivery, and it was evident that choice and direction rests with People. People expressed a high level of satisfaction with the service they receive and the resulting outcomes.

Staff are well supported and offered comprehensive orientation, professional development and coaching to support them in their roles. Staff members spoke about high job satisfaction and valued their relationships with other staff at all levels. The service makes use of Webcare, accessed by app by Support Workers, and paper files to manage information. The service has found that the Webcare app is less user-friendly than the desktop version and is investigating alternative file management systems.

Tautoko Options will lose significant leaders across the organisation, including Nelson Service Steward, in the near future. Discussion took place around mitigating risk to continuity for the organisation and several measures are already in place. We encourage the service to further mitigate the risk by ensuring maintenance of good knowledge of the history, principles and values encapsulating the “why” of Tautoko Options ways.

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Introduction and background – General observation

Tautoko Options was established in 2014 following the merger between Tautoko and Options in Community Living, who shared their values and vision to provide person-centred support for People. Tautoko Options Nelson provides support for 76 People under the Ministry of Social Development Disability Support Services Supported Living Contract. They also provide services for ACC clients and Supported Employment Services. The wider Tautoko Options organisation provides services through other regional offices in Blenheim, Wellington, Palmerston North, Wairarapa and Palmerston North.

Tautoko Options has a model of practice called Te Kauri, developed with support from Ngāti Toa Rangatira Kaumātua, and it underpins their service delivery.

- Whakapapa – Place layer upon layer
 - We take time to listen to People – their life experiences, knowledge, identity and their future dreams. This helps us walk alongside People with more understanding.
- Whanaungatanga – To bring People together
 - We provide opportunities to bring People together to build connections. Sharing experiences and common interests can build a sense of belonging, which is key to wellbeing.
- Manaakitanga – To build on strength, abilities and skills
 - We focus on respecting the Person and the People in their lives, creating space where they can develop their self-confidence. We look for opportunities where strengths and skills can be shared and People also get to give back.
- Whakaaroaro - To ponder, give thought to, reflect on
 - We build in opportunities for reflection and evaluation across all areas of our work – for individuals, team members and teams. This is how we learn and develop.
- Āhurutanga – Creating a safe place to be part of
 - We endeavour to create a space where all People feel safe, comfortable and valued as we work with individuals and groups, by making space for honest feedback.

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Tautoko Options makes use of training and person-centred planning resources from the Helen Sanderson Trust and these form the foundation of service delivery.

Feedback from disabled people and families

Summary:

People were positive about the support they received from Tautoko Options. They spoke of the ways they exercised choice and control and how support enabled their activities, lives and goals. People told us they had good relationships with Support Workers, Service Coordinators and the Service Steward.

Number of People interviewed:

	People	Families / Whānau	Staff	Management
Number	6	4	9 (7 Support Workers 2 Service Coordinators)	1

Findings Relative to Developmental Evaluation Tool

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Section 1: Identity

1.1. People choose and realise personal goals

People, families and staff described how goals are developed collaboratively using a wide range of person-centred planning tools. People spoke to us about their current and past goals. Examples we heard included voluntary work, independence skills, money management and driving licences. Support provided aids progress towards goals, and regular reviews include conversations and notes about What's working / What's not working.

The Evaluation Team sighted a wide range of completed person-centred planning tools and Goal Tables for each person. Goals are also recorded in Webcare. Completed goals are archived, progress notes recorded and review notes added. Goals are most frequently set with Service Coordinators, but as roles shift to accommodate the new self-managing teams model, Support Workers are taking on this task. We encourage the service to consider ways to ensure consistent understanding of recording and planning implementation of goals.

Service Coordinators work with Support Workers to ensure plans are effectively implemented, reviewed and progress monitored. "Catch-up" meeting notes are uploaded to Webcare and paper copies kept in individual files. Meeting notes show that people sometimes attend these meetings and at other times meet separately to review progress. We encourage the service to include people in meetings as much as possible and to ensure they have access to notes for meetings that take place without them.

1.2. People choose services

People access the service through the local NASC. Some People selected Tautoko Options based on recommendations from the local community and others from information shared by NASC.

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The Evaluation Team sighted current Needs Assessment “My Plan” documents and Service Authorities for each Person we met.

Tautoko Options provide thorough and clear information about their services and philosophy online, in person and in their Easy Read “Welcome Booklet”. Welcome packets include communication information, rights and responsibilities, and complaints processes. The current complaints process information is extracted from the Easy Read “Welcome Booklet”, signed and dated. We viewed signed and dated complaints and service agreements for all the People we met with but note that some are quite old. At feedback we discussed best practice approaches of reviewing and renewing this information with People annually to ensure understanding remains current.

The Evaluation Team sighted the Person-Centred Thinking & Planning Policy, and the Person-Centred Complaints, Resolution, Culture and System Policy, describing collaborative approaches to service. These are reflected in online information, the “Welcome Booklet” and Staff Handbook. We also sighted Pasifika Policy and Māori Policy for Service Delivery. The service expresses its values in Te Reo Māori and English, and has a service model, Te Kauri, to describe their service philosophy and approach. Staff have good connections with local iwi and Kaupapa Māori services and People told us about the Kaupapa Māori services they are supported to connect with. One Person we met with has a role as Kaumatua for the service and he explained the ways in which he supported the service in this role.

1.3. People choose where and with whom they live

People we met with live in their own homes, some with family or flatmates. We heard examples of ways in which support from the service had enables People to consider and plan for the future, including where and with whom they choose to live.

Tautoko Options does not provide accommodation.

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1.4. People choose their place of work / day service

People spoke about the work they do, the places they visit, and the activities they enjoy with support from Tautoko Options. People, families and staff spoke about the ways in which support enabled People to expand their networks and access their community in ways that suited them. People spoke about cultural and religious-based groups and activities, and their preferences were clearly central to the programme of support they receive.

1.5. People have friends

The Evaluation Team heard about People's social networks, some more extensive than others. Staff are alert to the possibility of social isolation and loneliness, and we heard that they support opportunities to be alongside others and encourage connections while respecting the preferences of the People they support.

The service is alert to the risk of overdependence and role confusion. Care is taken to mitigate the potential for People to view support staff as 'friends' by connecting People with more than one support person. The Easy Read "Welcome Booklet" sets out roles and boundaries to support this (e.g. no gift policy).

1.6. People are satisfied with services

People and families were consistently positive about the individual support provided by the service. We heard that People and Support Workers are carefully matched and that People have the opportunity to express their preferences before and after meeting support staff.

People and families shared that their support staff know how they preferred to be supported. We heard that person-centred planning allows People to share their support preferences in One Page Profiles and Ten Top Tips for Working with Me formats.

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Support is scheduled and focused on plans and goals and is also flexible around People's changing lives, needs and priorities.

We sighted the complaints process information for People, the Person-Centred Complaints, Resolution, Culture and System Policy and the complaints register. People, families and staff comments on the ways concerns and complaints are acted upon match with the policy and process documents we viewed. People and families shared with us examples of raising concerns, the process, and the outcomes they experienced. They felt they were heard, the service responded and they were satisfied with the outcomes.

Regular surveys are conducted using digital and paper formats. The service has recently moved to a national survey designed by Tautoko Options "Working Together for Change" service user group. Results are collated and key findings reviewed by groups within the self-managing organisation (e.g. Service Advice Team, Health and Safety Team). This process would be further enhanced by ensuring that local Service Stewards and their teams also receive direct feedback on the findings of the survey.

1.7. People are satisfied with their personal life situations

People spoke with us about their lives, plans for the future and past achievements. It was evident that People value the contribution Tautoko Options makes to their lives and are confident in the ongoing support they receive. People who had previously received support from other agencies made highly favourable comparisons, particularly highlighting communication and choice.

Requirements: Nil

Recommendations:

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- Consider ways to ensure consistent understanding of recording and planning for the implementation of goals. (1.1)
- Review the Easy Read “Welcome Booklet”, including the complaints process, with People annually to ensure understanding remains current. (1.2)



Section 2: Autonomy

2.1. People make decisions about their lives

The Evaluation Team sighted a range of person-centred plans and documents guiding support. We heard examples from People, families and staff demonstrating that support aligns with paperwork. People told us that they felt comfortable making and communicating decisions about activities and support they need day-to-day and staff spoke about flexible and responsive support.

Tautoko Options involve People in recruitment workshops to appoint staff at all levels. People who took part in the process described how they participated in discussions and activities with candidates and gave feedback on the candidates. Staff recruited in this way shared that it made clear the values and philosophy of Tautoko Options and gave them insight into expectations for employment.

Tautoko Options positions staff to be guided by People and provide person-centred support. The “Team Member Core Roles & Accountabilities” document makes clear that:

“The primary responsibility of a team member is to embody the role of a Person-Centred Thinking Practitioner”.

It sets out purposes and accountabilities, and describes success in aspects such as “Skill Builder”, “Well-being Supporter” and “Community Builder”. The document includes a reflective practice tool linked to role aspects to inform coaching sessions with Service Coordinators.

Staff spoke about effective orientation and training, including shadowing other Support Workers with new People they might work with so they get to know each other. People are asked if they want to continue with new staff.

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See also sections 1.1 and 1.6.

2.2. People decide when to share personal information

The Evaluation Team viewed records on Webcare and paper files and both are appropriately secured. Support Workers have work phones with secure access to the Webcare app to record their work and view support information. Service Coordinators have work laptops with secure access to Webcare. Staff find that the app is less user-friendly than the desktop version of Webcare. Tautoko Options is exploring other digital file management systems that might better meet their needs and we encourage the service to prioritise this.

We sighted the Tautoko Options Confidentiality and Privacy Act Policy, and feedback from People, families and staff indicate that practice aligns with policy.

2.3. People live in integrated environments

People, families and staff spoke about the ways that Tautoko Options support People to live everyday lives in their community. We heard that People take part in fitness opportunities, hobbies, enjoy amenities, work, volunteer and participate in cultural and religious activities. Staff share information about new opportunities and support planning and participation when People choose to try new things. At times People are given extensive social support to try new things.

Tautoko Options staff meet weekly and reflect on success stories as well as share information about opportunities. We discussed formalising this as “community mapping” to capture and share the wealth of knowledge staff hold.

2.4. People perform different social roles

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People we met work, volunteer, are valued family members, have hobbies and contribute to religious, cultural and activity-based groups. People also have roles in support of Tautoko Options participating in recruitment and acting as Kaumatua. The national organisation has developed a pilot service user group 'Working Together for Change' and plans to expand this into Nelson in the near future. We discussed this as an opportunity to expand disabled people's contribution within the organisational structure of self-managing teams (e.g. as part of Project Teams).

Requirements: Nil

Recommendations:

- Exploring digital file management systems that might better meet service needs, particularly for staff outside of the office. (2.2)
- Build on "Working Together for Change" groups and expand disabled people's contribution within the organisational structure of the self-managing teams (e.g. as part of Project Teams). (2.4)

Section 3: Safeguards

3.1. People are connected to natural support networks

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People, families and staff spoke of the ways Tautoko Options support People to strengthen relationships and connections across the community. Staff spoke of varying strengths of connections People experience and demonstrated thoughtful consideration of opportunities.

People shared their experiences of connecting with organisations in the community with support from Tautoko Options to locate and connect.

We sighted the Sudden / Unexpected Death Policy setting out appropriate processes to guide responses.

3.2. People are safe

Tautoko Options has appropriate policies and processes in place to manage risk and safety, including Safeguarding Children, Young People and Vulnerable Adults and the Risk Assessment and Risk Management Policy and Risk Assessment Matrix.

Tautoko Options positions staff to be guided by People and provide person-centred support. The “Team Member Core Roles & Accountabilities” document makes clear that:

“The primary responsibility of a team member is to embody the role of a Person-Centred Thinking Practitioner”.

It sets out purposes, accountabilities and describes success in aspects such as “Skill Builder”, “Well-being Supporter” and “Community Builder”.

The document includes a reflective practice tool linked to role aspects to inform coaching sessions with Service Coordinators.

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A comprehensive Staff Handbook includes information about professional boundaries, confidentiality, positive behavioural approaches, health and safety, and abuse identification, prevention and reporting. It also covers Tautoko Options organisational values and philosophy, and the Health and Disability Commission Rights and Responsibilities. Welcome packets for People include the same information in Easy Read formats.

The Evaluation Team sighted the Orientation Plan / Checklist for new staff, including a thorough review of the Staff Handbook, philosophy and values, as well as further training plans.

Requirements: Nil

Recommendations: Nil

Section 4: Rights

4.1. People exercise rights

People, families and staff spoke of the ways that People exercise choice in accessing and receiving support from Tautoko Options.

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People are comfortable raising concerns by sharing examples of when they did so and the results. We sighted the Person-Centred Complaints, Resolution, Culture and System Policy and the Complaints Register. The Welcome Package for People includes Health and Disability Commission information and complaints information. People are comfortable raising concerns by sharing examples of when they did so and the results.

See also section 1.2.

4.2. People are respected and treated fairly

Tautoko Options service model Te Kauri values of Whakapapa, Whanaungatanga. Manaakitanga, Whakaaroaro and Āhurutanga were apparent in the conversations about support we had with People, families and staff.

People spoke about the support they receive and their relationships with staff and described respectful relationships. Individual plans and documentation celebrate People's unique strengths and abilities. Staff spoke of their work and described respectful, empowering support strategies.

Requirements: Nil

Recommendations: Nil

Section 5: Health and Wellness

5.1. People have the best possible health

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The Evaluation Team heard that staff sometimes accompany People to health appointments and they value having the option to have someone else with them to recall what has been said. When People choose, staff support them with goals around health (e.g. exercise and food choices).

5.2. People are free from abuse and neglect

The Staff Handbook and “Welcome Booklets” for People include information about recognising, preventing and responding to abuse. Appropriate policies and processes are in place.

See also section 3.2.

5.3. People experience continuity and security

People receive support from identified staff and care is taken to ensure that they have relationships with more than one staff member. Processes are in place to ensure that People know they have options for support from other staff they know when staff are on leave. People who have received support from other providers mentioned this as a feature of Tautoko Options they appreciate.

Staff Teams supporting People share notes on the Webcare app and meet regularly for documented “catch-up” meetings to coordinate their support.

Whole staff meetings take place weekly, and individual coaching and planned professional development and training is in place to foster job satisfaction and promote stability. Many staff members told us how much they liked their job, the organisation and valued their relationships with other staff at all levels.

Requirements: Nil

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Recommendations: Nil

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Summary of the Strengths of this Service

- Many examples of Tautoko Options practice aligning with their published values
- Information about the way the service operates was consistent across documentation and feedback from People, families and staff
- People, families and staff described respectful and trusting relationships and high levels of satisfaction with the service
- People exercise a high level of choice at the heart of the service they receive
- Support is delivered using a person-centred approach
- Comprehensive information about the service is provided in accessible Easy Read format in the “Welcome Booklet”.

Summary of Significant Findings

- Tautoko Options will lose significant leaders across the organisation, including Nelson Service Steward, in the near future. Discussion took place around mitigating the risk to continuity for the organisation and several measures are already in place. We encourage the service to further mitigate the risk by ensuring maintenance of good knowledge of the history, principles and values encapsulating the “why” of Tautoko Options ways.

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Specific Findings and Requirements

There are no requirements arising from this evaluation.

Key to abbreviations used in the requirements

Risk Level	Consequence	Action Required
Low	Consequences of not meeting the standard would put consumers at minimal risk of harm.	Negotiated plan to rectify the matter within a specified timeframe (e.g. one year).
Mod	Consequences of not meeting the standard would put consumers at moderate risk of harm.	Negotiated plan to rectify the matter within a specified timeframe (e.g. within six months).
High	Consequences of not meeting the standard would put consumers at significant risk of harm.	Negotiated plan to rectify the matter within a specified timeframe (e.g. six weeks).
Critical	Consequences of not meeting the standard would put consumers at extreme risk of harm or actual harm occurring.	Immediate corrective action is necessary, including documentation and sign-off from evaluators within 24 hours to ensure consumer safety.



Recommendations

Recommendations are made where there is no immediate concern about the quality of the service, or where developments are already underway towards meeting the requirements in the existing contract.

Recommendations	
1.	Consider ways to ensure consistent understanding of recording and planning for the implementation of goals. (1.1)
2.	Review the Easy Read “Welcome Booklet”, including the complaints process, with People annually to ensure understanding remains current. (1.2)
3.	Exploring digital file management systems that might better meet service needs, particularly for staff outside of the office. (2.2)
4.	Build on “Working Together for Change” groups and expand disabled people’s contribution within the organisational structure of self-managing teams (e.g. as part of Project Teams). (2.4)
5.	Mitigate the risk to the organisation of key leaders leaving by ensuring maintenance of good knowledge of the history, principles and values encapsulating the “why” of Tautoko Options ways.

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Appendix 1

Documents reviewed

<https://tautoko.org.nz/>

WebCare Client Management System
Personal files and plans for people we met
Team Member Core Roles & Accountabilities
Service Coordinators Core Roles & Accountabilities
Service Steward Core Roles & Accountabilities
Orientation Plan / Checklist
Staff Handbook
Welcome Booklet
Accident and Incident Reporting Policy
Annual Reflection Policy and Process
Coaching Policy
Confidentiality and Privacy Act Policy
Health and Safety Policy
Māori Policy for Service Delivery
Pasifika Policy
Person-Centred Complaints, Resolution, Culture and System Policy
Person-Centred Thinking and Planning Policy
Positive Behavioural Approach Policy
Professional Development Plan
Professional Supervision Policy (external)
Quality Policy
Recruitment and Selection Policy

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Risk Assessment and Management Policy
Risk Assessment Matrix
Service Steward Roles and Responsibilities
Sudden/Unexpected Death Policy
Safeguarding Children, Young People, Vulnerable Adults and their Family / Whānau Policy
Training Policy
Training (External) Policy



Response to the Draft Evaluation Report

Response from the Provider

We do not wish to request any changes to the document. The feedback from the team and people we support was that it was a very positive experience. They wished to thank Lisa and Peter for their very warm, understanding and flexible approach to the evaluation, people that took part said that it was a very enjoyable experience for them.

The report contains an excellent summary of the verbal feedback we received.