Quarterly Progress Report

Te Pou Matakana

Date issued:	7 August 2017	**Issued to:**	Te Puni Kōkiri
Overall project status:	Green	**Issued by:**	Te Pou Matakana
Period start:	1 April 2017	**Period end:**	30 June 2017

1. Commissioning activity

1.1. Completed activity

Whānau Direct

Whānau Direct partners provided the key points below through their narrative reports:

- Whānau standards of living
  - Whānau applied for basic items to improve the standards of living. There was a growth in the number of heating sources especially during the winter months
  - Rent arrears was highlighted with the cost of rental properties climbing in all regions
  - Flooding during the winter months saw an influx of applications from whānau that required urgent assistance
- Whānau health
  - Whānau dental health plans were supported through one off visits to the dentist
  - Whānau were supported with the cost of attending GP visits and prescriptions
- Whānau participation in community
  - Whānau received assistance with vehicle repairs in order to travel to work and appointments
  - Whānau Direct supported whānau enrol in defensive driving courses and sit their learners license
- Whānau knowledge
  - Whānau Direct was accessed for school uniforms, fees and resource requirements
  - Partners linked whānau with budgeting advice services to support whānau with budget management
- Whānau relationships
  - A greater number of Whānau Direct applications were made by kaumātua who are supporting their mokopuna
- Whānau engagement with Te Ao Māori
  - Whānau knowledge and engagement in Te Ao Māori have increased through Whānau Direct with support to purchase course resources

Other Activities

- Some partners had inquiries from whānau about accessing Whānau Direct but were reluctant to engage with ongoing support services
- Partners and Kaimahi continue to review and refine their internal Whānau Direct process include assessment and planning tools to better streamline the process for whānau.

Collective Impact for Whānau

- Lead partners highlighted the following points in their narrative reports:
  - Regular communication and updates with partners within Collective Impact initiatives has enhanced relationships
  - Some partners have multi-discipline team approaches to assessing and supporting whānau with their plans
  - Alliances between partners and private business within some regions has meant greater cohesion and better outcomes for whānau
  - The provision of different services that partners offer provides wraparound programmes to meet the needs of whānau
  - Refining programmes to meet the needs of whānau continued over this period
  - Supporting whānau from dependence to interdependence, self-realisation and actualisation has been a key outcome
  - Whānau relationships have been enhanced with the well-being and connectedness of whānau members through collective engagement

- Providing specialist Kaiārahi allows whānau to meet specific outcomes related to the Collective Impact initiative
- Safe and warm housing continues to be highlighted as a major issue within many collectives throughout Te Ika a Māui
- The cost of living in urban areas continues to be a challenge, with whānau living in cold, damp and cramped conditions
- Partners reported the importance of the shared learnings with other collectives throughout Te Ika a Māui
- Whānau Tahi Version 5 (WTv5) supports partners to accurately track and report on whānau outcomes

Other Activities

- TPM developed the Collective Impact for Whānau action plan template for 2017/18. Each lead partner was required to submit the plan to clearly identify their key areas of focus for the next 12 months by 31 March 2017
- Collectives shared their initiatives with others and their plans for the following year at the Collective Impact Shared Learnings Hui described below. Collectives were also able to participate in interactive workshops that continued shared learnings. Following the hui, many reviewed and refined their action plans based on new learnings
- TPM and lead partners worked together to further refine the plans and key activities. The action plans have now been signed off and will be form part of the head agreements for 2017/18.

Kaiārahi

Kaiārahi provided the following feedback via narrative reporting:

- Whānau health
  - Whānau continue to have issues with government agencies (WINZ, HNZ) and seek Kaiārahi assistance for advocacy
  - Mental health was highlighted as an area that requires support from mental health professionals
  - Suicide featured for some whānau who are dealing with members who have passed on or who have attempted suicide
  - Tikanga Māori methods support whānau health and wellbeing for example making wahakura for pēpi
- Whānau standards of living
  - Housing is the biggest issue with whānau struggling to pay climbing rental prices
  - The shortage of houses is exacerbated by agents who prioritise professional couples over whānau in crisis. The follow-on effect is that whānau have moved into situations where there is overcrowding
  - Whānau find it challenging to meet the basic cost of living including food, clothing, household items and increased power bills during winter
- Whānau knowledge
  - Kaiārahi continue to engage with agencies and advocate for whānau in desperate need and support
  - Some whānau are on some form of benefit and have difficulty making ends meet. Issues surrounding finance, service accessibility and support are a recurring theme
  - Whānau have been assisted in becoming connected with the internet and email which in turn helps with educational aspirations
  - Some Kaiārahi are collaborating with kura to seek alternative education for rangatahi who have left school with no education or job prospects
- Whānau participation in the community
  - Some rural whānau have issues accessing transport to obtain basic needs including food, health and social services
  - Support for driving lesson and driver licenses is ongoing
  - Kaiārahi have assisted whānau members apply for jobs and prepare for interviews

- Whānau relationships
    - Building relationships with whānau can challenging especially for new Kaiārahi. Relationships are critical and allow whānau to be open and honest about their situation and the support they require going forward
    - Kaiārahi reported that some whānau needs change quickly and the need for adaptability has been key in the provision of services
- Whānau engagement in te ao Māori
    - Kaiārahi who have whakapapa connections is valuable to the connectedness with whānau. This supports the ongoing relationship
    - Whānau have had assistance with researching Māori land interests to assist in whakapapa and gaining grants
    - Te reo me ōna tikanga classes in the community have supported whānau with cultural connectedness

Other Activities

- Some whānau are transient, have moved out of the area and Whānau Ora plans remain incomplete
- There has been an increase in whānau requesting home visits. Whānau Ora partners ensure health and safety protocols are in place to support Kaiārahi
- Some partners have appointed Senior Kaiārahi who support consistency in delivery of services, information gathering and reporting
- Whānau Tahi upgrades have streamlined the data collection and reporting process
- Kaiārahi have been supported to complete a range of courses including te reo, first aid and literacy courses
- Continued support of Kaiārahi who are completing their Whānau Ora Diploma
- The Whānau Ora diploma was highlighted as a practical course which supports Whānau Ora practice.

Pou Hākinakina

Pou Hākinakina provided the following feedback via narrative reporting

- Pou Hākinakina continued to develop relationships with sports trusts across Te Ika ā Māui
- Regular network meetings with stakeholders in the region provide a forum to socialise Whānau Ora and the Pou Hākinakina role
- Some Pou Hākinakina were supported by Kaiārahi in terms of whānau referrals and establishing cohesive relationships with providers and health professionals
- Collaboration between Kaiārahi and Pou Hākinakina has provided better coordination of activities related to whakapakari tinana
- Some whānau have shown strong commitment to achievement of their own health and wellbeing outcomes
- Whānau participation in sport/active lifestyle has increased through one-on-one and group activities
- Nutrition was identified as an integral success factor of lifestyle change
- Initiatives to address childhood obesity have been implemented using a Collective Impact approach
- Pou Hākinakina have adapted the type of activities they offer based on feedback from whānau
- Whānau Direct supported the purchase of equipment and resource for whānau to increase their physical activity
- Pou Hākinakina engaged in a number of community events such as expos, social media initiatives and e-newsletters

Other Activities

- TPM developed and distributed the action plan template to relevant partners. The template focused on the research conducted to date, vision and objectives of the programme and specific tasks that need to be completed in 2018/19
- Plans were submitted by partners at the end of March. A summary of the plans is provided below:

Region	Summary of Action Plan 2018/19
Tai Tokerau	Choosing healthy lifestyles, better managing health conditions and living longer

Region	Summary of Action Plan 2018/19
	• Promoting healthy lifestyles behaviour • Introducing a sustainable coaching programme • Seeking co-investment • Working with key stakeholders to share resources
Tamaki Makaurau	Behaviour shifts in whānau, comprehensive understanding of future funding stream to advocate for a change of funding for whānau • Cooking skills and increased health meals, increased motivation and knowledge to live a healthy lifestyle, increased weekly physical activity output • Comprehensive understanding of current/future funding for sport and recreation within the region and advocacy for a change of funding that increases and enhances Māori whānau participation • Increase engagement of whānau to become leaders in health and wellbeing • Build ongoing relationships with sports trust and other stakeholders
Hauraki Waikato	Improve whānau wellbeing and encouraging positive lifestyle changes • Collectively improving whānau wellbeing and encouraging positive lifestyle changes • Deliver programmes in physical activity and nutrition • Ongoing communications through social media, calendar of events, whānau stories
Waiariki	Systems thinking approach to social structures activity and positive change • Deliver programmes in sport, physical activity and rongomamau • Influence policy that benefit whānau participation in sports and recreation • Create tools to grow Māori leadership skills in sports and recreation • Continue work with key stakeholders
Ikaroa Rāwhiti	Collective Impact partnership to improve the health and wellbeing of tamariki and whānau • To build a partnership with key partners from the region • To improve the health body weight of tamariki and their whānau • To provide programmes in physical activity, nutrition and health literacy
Te Tai Hauāuru	Improve the health and wellbeing of whānau and build the capacity and capability of kaimahi • Seamless referral pathways for whānau to access whakapakari tinana programmes • Build responsive kaimahi to ensure whānau have access to opportunities in whakapakari tinana • Deliver physical activity and nutrition programmes • Ongoing communications through social media, marketing, branding

- Following action plan sign off, head agreements were prepared for partners.

Data and Outcome Analyst

- User training and support continued for Whānau Ora partners and Kaimahi
- Whānau Tahi Version 5 (WTv5) was a major focus over this period
- Kaimahi have provided positive feedback in relation to the system upgrades. They understand how the system aligns to whānau plans and goals
- There were challenges for some partners migrating data to WTv5. The issues have been addressed with the Whānau Tahi support team
- Some partners have reviewed internal processes with respect to practice pathways and processes
- Some positions await advanced training (and the PowerBI) to ensure better efficiency in populating data for reporting.

Other Activities

Head Agreements for Whanau Ora Commissioning Activities

- In preparation for contracting TPM met with lead Whānau Ora partners in June. The purpose of the hui was to discuss:
    - The model for allocation of Whānau Ora commissioning funds by Māori electoral region and territorial authority area
    - Funding allocation for 2017/18
    - Contracting arrangements for 2017/18 and out years
- Following the roadshow hui, a review of head agreement and all programme guidelines was completed, followed by a final external legal review
- Three year agreements were drafted and sent to lead Whānau Ora partners to cover baseline funding for relevant commissioning activities
- Sub-contract agreements were also prepared as templates for lead Whānau Ora partners to utilise if required
- Variations will be processed for new initiatives including the Innovation Fund.

Collective Impact for Whānau Shared Learnings Hui

- The Shared Learnings Hui took place in April 2017. All 13 lead partners attended along with other Whānau Ora partners from across Te Ika a Māui
- Day one of the hui provided the opportunity for each collective to present a 10 minute snap shot of their Collective Impact initiative and plan for 2017/18. This provided attendees with the insight to:
    - What has been achieved so far?
    - What they need to focus on in the next 12 months?
    - What the strengths are across their collective and what tools and resources have been attained so far?
    - What challenges they might face in the coming 12 months?
- Day two offered interactive workshops that continued shared learnings of Collective Impact for Whānau.
    - Workshop One: Measuring Medium-term Outcomes for Whānau - 'Aligning your initiative to measure medium-term outcome behaviour changes for Whānau', 'Developing your Shared Outcomes Indicators on whānau progress and reporting these to your partnership'
    - Workshop Two: Navigating Relationships - Ensuring all partners have collective ownership of their initiative, adaptive leadership, leadership competencies required for managing collective impact initiatives
    - Workshop Three: Sharing Collective Impact for Whānau tools and resources - What tools are being used to capture baseline data of whānau and to measure whānau progress, sharing resources and best practice models that have worked well with whānau
    - Workshop Four: Reportage and technologies for Collective Impact for Whānau initiatives - Understanding Output, Quality and Success Indicators, Whānau Tahi, Once Place, One Plan, One Screen.

Whānau Ora Diploma

- The Diploma supports Kaiārahi to be Whānau Ora ambassadors, to build sustainable skills and inform best practice from the ground up
- 12 lead Whānau Ora partners supported Kaiārahi to enrol with the Whānau Ora Diploma
- 62 Kaiārahi commenced study, seven withdrew due to demanding work and whānau commitments. The remaining 55 Kaiārahi are actively engaged in study
- Module 1 - Nga Kaupapa Tuku Iho was successfully completed by all Kaiārahi. Two unit standards within Module 2 - Mana Whānau have also been completed
- The Diploma is delivered through monthly workshops which take place via face to face hui, Facebook, Skype, Zoom, phone and email
- The team provide ongoing guidance and support to Kaiārahi throughout Te Ika a Māui.

Transfer of Ministry of Social Development Contracts

- Please see the attached Ministry of Social Development progress report.

Ministry of Health Breast and Cervical Screening Support Services

- The TPM action plan for 2017/18 was accepted and is in the process of been implemented
- The three lead partners (Te Arawa Whānau Ora, Te Rūnanganui o Ngāti Porou and Te Tihi o Ruahine Whānau Ora Collective) are progressing well particularly in the area of breast screening support services
- The next progress report is due to the Ministry of Health on 31 July.

Research and Evaluation

Collective Impact for Whānau Review

- The report contains a number of self-evaluation tools, Collective Impact 'best practice' indicators and measures, a "learnings" framework and guide that partnerships can use to inform their work and improve their Collective Impact capabilities and promote best practice
- The toolkit draws from a number of sources including the Guide to Evaluating Collective Impact and the formative and process evaluation that was conducted in 2016
- It is important to note the toolkit is mainly focused on providing a set of indicators, performance measurements and evaluation activities that support the implementation and operationalisation of a Collective Impact initiative rather than success indicators to monitor and track outcomes
- The toolkit is intended to be descriptive rather than prescription and merely provides the "nuts and bolts" of a Collective Impact initiative based on what is currently considered 'best practice', however, as each initiative across Te Ika A Māui matures over time it is expected that they will develop their own quality systems, language and approach to Collective Impact and will localise their initiatives based on 'what works' for whānau in their communities
- The final toolkit is with brand and design and will be complete in August 2017.

Kaiārahi Review

- This research report focused on gaining a deeper understanding of the role of Kaiārahi in supporting better outcomes for whānau, particularly in terms of whānau engagement and how using a Whānau Ora/kaupapa Māori/strength based approach can support better outcomes for whānau
- The second part of the research was focused on understanding some of the challenges Kaiārahi face in their role as well as any innovative solutions that Kaiārahi and organisations have developed in order to deal with those challenges
- The first phase of the research was conducting a literature review of documents relating to Whānau Ora and the provision of Kaiārahi. The findings from the literature review suggested that the development of Whānau Ora and the provision of Kaiārahi was in reaction to a 'broken system' that had done little to address social and health inequities
- For the second phase of research, over 25 Kaiārahi and priority whānau were interviewed to gain a deeper understanding of how the role of Kaiārahi contributes to Whānau Ora and to identify any factors that impacted on Kaiārahi effectiveness in supporting Whānau Ora outcomes. The findings from these interviews showed that the role of Kaiārahi involved at least the following four strands of work:
    - Relational work - This involved building authentic and meaningful relationships of trust, confidence, and mutual respect were the catalyst for whānau success
    - Co-determination - Keeping the needs and aspirations of whānau at the centre of service delivery (whanau-centred approach), and whānau-centred planning and action (whānau plan), had the cumulative effect of gaining whanau ownership of the change process (whānau rangatiratanga) and paved the way for later outcomes
    - Navigation - Whānau assessments were an important tool for matching whānau needs with local and regional services and resources. Flexible and agile navigation enabled engagement and service delivery that catered to whānau realities and identified pragmatic solutions. Addressing social (e.g.

housing, education) and cultural (e.g. culture, identity) determinants helped whānau to overcome barriers that impeded progress towards their goals and aspirations. A whānau-centred approach promoted shared capability within and across services.
    - Adjustment work - Employing a whānau-centred approach resulted in innovative 'culturally grounded' solutions.
- This research identified that the beneficiaries of the Kaiārahi work programme were not only whānau but included other social and health professionals, and other social and health services. For example Kaiārahi provided not only culturally appropriate care to whānau, but also provided 'cultural' education to other social and health professionals, enhanced the acceptability and effectiveness of interventions, and supported other social and health services to address inequalities
- The report also provided insights into best practice and the need for further support around reporting and data capabilities and the continued need for workforce development to continue to grow a culturally and technically competent workforce capable of whānau-centred delivery
- The final report has completed.

Implementation of the Outcomes Roadmap

Whānau Assessment Tool

- The proposed whānau assessment tool was finalised by verifying current partner assessment tools (if they had any) mapped to the proposed TPM assessment tool. From this mapping tool TPM outcome areas were developed within each TPM outcome domain. The outcome areas were utilised in the design and finalisation of the TPM outcomes menu

Outcomes Menu

- TPM met with Whānau Ora partners to co-design the draft outcome menu in May 2017. Partner feedback, capability and readiness was assessed at the hui
- There was agreement that the outcomes menu would be implemented into Whānau Direct from 2017/18. The menu has been incorporated in the latest iteration of the TPM Investment Plan

Outcomes Measurement Surveys

Whānau Survey

- The aim of this survey was to measure if the Kaiārahi Programme was supporting whanau to achieve their desired outcomes. The close-off for the collection of annual whānau surveys was June 2017. It was expected that a sample of approximately 20% (n=837) of priority whānau would be surveyed. In total 632 (or 15%) of whānau who worked with Kaiārahi completed either an electronic or paper based survey. The survey data will be entered into a database, cleaned and analysed in 2017/18

Collective Impact Partner Survey

- The close-off for the collection of annual Collective Impact Partner Surveys was June 2017. It was expected that a sample of around 50% (n=6 or 7) of all Collective Impact Initiatives would be surveyed. In total 40% (n=5) of Collective Impact initiatives completed either an electronic or paper based survey. The aim of this survey was to measure if the Collective Impact Initiatives are helping to build Collective Impact partner capability to support whānau to achieve their outcomes. The survey data will be entered into a database, cleaned and analysed before the end of Quarter 2 2017/18.

Measuring Impact with Social Return on Investment

- Social Return on Investment (SROI) is an innovative, principles-based methodology and increasingly sought-out approach that takes into account the broader value created by an organisation or activity
- TPM has been a crucial advocate for Whānau Ora implementation, aligning with communities, to shape and determine outcomes indicative of whānau success. Measuring impact, rather than outputs, marks a fundamental shift in understanding how positive change occurs and whether an organisation's activities

contribute to reaching set goals. To this end, TPM introduced the SROI framework, as an innovative approach to measure impact in the Whānau Ora space. TPM produced a summary report that outlined the methodology and principles of SROI as well as its significance and application across sectors. SROI gives a better understanding of how to measure impact and be accountable to the stakeholders. It aids to facilitate strategic management and target appropriate resources at managing outcomes. The reports draws attention to its relevance to the TPM commissioning for outcomes model. It also highlights the first SROI study in the Whānau Ora space, undertaken by one of its partners - Te Whānau O Waipareira

- The Minister of Whānau Ora, Hon Te Ururoa Flavell launched the report "Measuring Impact with Social Return on Investment" in Parliament in June 2017. The report would help to give evidential direction for social impact in our communities, and more importantly shape the future for impact focused funding models.

1.2. Activity in progress

Whānau Direct

- Ongoing support from the helpdesk.

Collective Impact for Whānau

- Ongoing monitoring of Collective Impact initiatives.

Kaiārahi

- Ongoing monitoring of Kaiārahi progress reports.

Pou Hākinakina

- Ongoing support for Pou Hākinakina roles.

Data and Outcome Analyst

- The helpdesk continues to provide support.

Research and Evaluation

Commissioning Partnership Project Whakauae Iwi Research Centre

- As per the MOU with Whakauae iwi research centre, Wai Research have been conducting a study on Whānau Ora commissioning. This report explores the evolution of commissioning in Aotearoa, within the background of the development of the Whānau Ora framework of Māori service provision
- The commissioning model of TPM is analysed as a case study to investigate the impact that commissioning has, both nationally and also within a growing international indigenous commissioning context. So far the teams have conducted an internal and external literature review, a media review, key person interviews and provider interviews
- The analysis phase is currently underway with the project completion date being December 2017.

Collective Impact Best Practice Article

- An academic article which examines international literature on best practice principles for Collective Impact using the TPM Collective Impact initiative as a case study for comparative analysis. The article has been submitted to the Oxford Journal and is still awaiting confirmation of decision for publishing. The article will also be published in Te Kura Nui – the Te Whānau o Waipareira academic journal.

Other Activities

Innovation Fund

- Lead partners submitted draft action plans for the Innovation Fund in May 2017. TPM reviewed the plans and provided initial feedback to partners
- TPM will continue to work with partners to finalise the plans next quarter. Once the plans are finalised, a variation can be processed for initiatives to commence from 1 September 2017.

Whānau Tahi Rollout

- WTv5 has been implemented at three lead partners, three additional partners have received WTv5 upgrades and are in the final stages on internal roll-out, four partners are working through their WTv5 upgrades due for completion in Quarter 1 2017/18
- Training to support the use of the system and to support the collection of data in line with the outcomes framework is being provided as part of the roll-out
- WTv5 will continue to be implemented in 2017/18
- Approval has been received from the Ministry of Health to establish a secure link between cloud based WTv5 instances and the Ministry of Health identity services. Once this work is complete, clients details like NHI and address can be validated against national webservices which will further strengthen the data support geocoding and analytics.

Vulnerable Children Act 2014 and Health and Safety at Work Act 2015

- Ongoing confirmation of compliance across all partners in relation to policies and processes in place for both Vulnerable Children Act 2014 and Health and Safety at Work Act 2015.

1.3. Progress against Investment Plan

Key Activity	Quarter	Comments
Monitor Whānau Direct, Collective Impact, Kaiārahi (including Pou Hākinakina, Data & Outcomes Measurement Analysts), Innovation Fund, MSD services	Q4	Complete
Completion of Outcomes Roadmap implementation	Q4	In progress
Completion of Collective Impact process review	Q4	Complete
Completion of Kaiārahi services review	Q4	Complete
Planning for year four contracts	Q4	Complete

1.4. Activities planned for next quarter

- No activities or timeframes modified for next quarter.

1.5. Activities/timeframes modified for next quarter

- No activities or timeframes modified for next quarter.

2. Whānau engagement

- Please see the attached Whānau Engagement report.

2.1. Descriptions / narratives

2.1.1. Impact on whānau capability

Withheld under section 9(2)(a)

[redacted]

[redacted]

3. Performance

- Please see the attached Whānau Engagement report.

4. Spending profile

4.1. Operating costs and commissioning funds

- Please see the attached Financial report.

4.2. Cost escalation / underspend issues

- Please see the attached Financial report for any underspend or cost escalation.

5. Key risks / issues

5.1. Key risks

Withheld under section 9(2)(b)(ii) and 9(2)(ba)(i)

Description	Impact	Likelihood	Mitigation	Status
[redacted]				

5.2. Expected delays

- There are no delays this quarter.

6. Operating policies

By checking this box, I confirm that the operating policies in place satisfy the principles and mandatory requirements as set out in Clause 4 of Appendix 11 to the Outcome Agreement.	Y

Acknowledgement

By signing below, I confirm that the information contained in this report is true and correct to the best of my knowledge.

Signed **Debbie Cairns**

Date **31 July 2017**