



Whānau Ora and Social Investment

Date: 29 February 2024

Security level: In-Confidence

To: Hon Nicola Willis, Minister for Social Investment
Hon Tama Potaka, Minister for Whānau Ora

Purpose

This briefing:

- outlines what is known about the impact of Whānau Ora, and a plan to consolidate and strengthen this evidence base; and
- sets out how Whānau Ora and the social investment approach might complement each other.

Recommendations

It is recommended you:

Note that Whānau Ora has a proven ability to reach those whānau and communities which government agencies struggle to reach. Noted

Note that there are opportunities to strengthen the evidence on the impacts of Whānau Ora to support future decision-making Noted

Note the proposed approach, led by Te Puni Kōkiri with support from the Social Wellbeing Agency, to consolidate and strengthen this evidence base Noted

Direct Te Puni Kōkiri (supported by the Social Wellbeing Agency) to work with Statistics NZ on getting Whānau Ora data into the Integrated Data Infrastructure (IDI) and report back to Ministers with a proposed timeline by the end of March. ☐ Yes ☐ No

Forward this briefing to the Minister for Statistics ☐ Yes ☐ No



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Proactively released

Summary

- There is evidence that Whānau Ora has a positive impact for people who receive the service and generates positive returns on investment. Whānau Ora has a proven ability to reach those whānau and communities which Government agencies struggle to reach. The Whānau Ora locally-led, Government enabled delivery model means it is a potential vehicle for cross-portfolio social investment.
- While significant opportunities exist to improve the robustness of the evidence of the positive impacts of Whānau Ora, demonstrating causal effect is a known challenge across the social sector. By applying a robust evaluation methodology to quantify the impacts of Whānau Ora, Government could consider investment in Whānau Ora alongside other social investment decisions in future.
- An IDI-based evaluation looking at long-term outcomes over a wide range of indicators would strengthen the evidence of impact of Whānau Ora. The Social Wellbeing Agency has developed and applied the methodology to other initiatives previously and considers it a rapid and robust approach. This will require Te Puni Kōkiri to partner with Whānau Ora Commissioning Agencies (to access data), StatsNZ (to load data into the IDI) and the Social Wellbeing Agency (to advise on methodology).
- Subject to your direction, Te Puni Kōkiri will progress discussions with StatsNZ and the Whānau Ora Commissioning Agencies (supported by the Social Wellbeing Agency) to agree a way forward and timeframe to undertake robust evaluation of the impacts of Whānau Ora and report back to joint Ministers on a proposed timeline by the end of March.

Background

1. Social Investment is an approach which seeks to improve the lives of New Zealanders by applying rigorous and evidence-based investment practices to social services. The Social Wellbeing Agency has developed a work programme to implement the priorities for the Social Investment portfolio, which includes establishing a programme to evaluate social sector spending (in conjunction with Treasury) and developing consistent standards for evidence and evaluation enabling impacts of various interventions to be quantified and compared.
2. Whānau Ora is a devolved commissioning model and an example of whānau-centred delivery that enables the public service to deliver more effectively to hard-to-reach whānau and communities that need it the most. It is locally led, enabled by government. Whānau Ora services can be mobilised quickly and are designed to support families with multiple, overlapping issues. At its core, is the idea that whānau know their needs and aspirations best, and providers can work with families in flexible ways to meet these needs and aspirations.
3. Te Puni Kōkiri contracts with three Commissioning Agencies to deliver outcomes for whānau. These Outcome Agreements have been extended twice, in 2017 and 2021. The contractual arrangements are due to conclude on 30 June 2024, and Te Puni Kōkiri has proposed a short-term contract extension to consider how Whānau Ora might be strengthened and could support a social investment approach.

4. This briefing outlines what is known about the effectiveness of Whānau Ora, a proposed plan to strengthen this evidence base, and how the Whānau Ora delivery model can support the implementation of a social investment approach.

Assessing the impact of social services

There are different levels in the quality of evidence for assessing impact

5. Robust measurement of impact is a key challenge across the social sector. Use of more rigorous measurement methods enable us to be more confident in being able to say that a particular intervention was directly responsible for improving outcomes. A shared understanding of impact measurement and the use of evidence is critical to enable consistent measurement and comparison of investments.
6. The Social Wellbeing Agency is developing a value and impact measurement framework to underpin social investment decisions. The framework will outline the threshold of evidence for social investment and provide a shared understanding of the appropriate use of different types of evidence for impact measurement. In the interim, the following framework outlines three levels of confidence in knowing that an intervention has an impact on outcomes.

Level	When	Methods	What it measures
Level 1 You can describe what you do and why it matters, logically, coherently and convincingly	<ul style="list-style-type: none"> Appropriate for very early-stage innovations 	<ul style="list-style-type: none"> Theory of Change' or Intervention logic 	<ul style="list-style-type: none"> Outlines expected effects
Level 2 You capture data that shows positive change, but you cannot confirm you caused this	<ul style="list-style-type: none"> Appropriate in early stages / smaller-scale interventions 	<ul style="list-style-type: none"> Collecting data before and after intervention – for example through surveys. 	<ul style="list-style-type: none"> Measures effects (but does not isolate impact of intervention).
Level 3 You can demonstrate causality using a control or comparison group	<ul style="list-style-type: none"> Appropriate for decisions large-scale interventions that have been well-researched, delivered consistently, backed up by early indications of positive impact. 	<ul style="list-style-type: none"> Use of comparison groups/random selection of participants 	<ul style="list-style-type: none"> Measures effects and isolates impact of intervention.

Adapted from: Puttick and Ludlow (October 2012) "Standards of Evidence for Impact Investing" London, Nesta.

7. It is important to note that this framework has not been developed specifically for a New Zealand context. However, it still provides a useful and simple reference to assess the robustness of different types of evidence in the social sector.

Substantial Level 1 and 2 evidence indicates Whānau Ora programmes and initiatives deliver services effectively for hard-to-reach whānau and communities

8. Since its inception in 2013, many Whānau Ora initiatives and programmes have been evaluated. Whānau Ora providers collect detailed information at a local level from whānau on the outcomes of their support, measured against the Whānau Ora Outcomes Framework (See Appendix One). The outcomes measured align with the Whānau Ora model: they are holistic, whānau-centric, aspirational and grounded in Te Ao Māori.
9. Evaluations have consistently found positive impacts. Whānau and communities have reported overwhelmingly positive experiences, including intangible benefits (like improved resilience, hopefulness, and confidence to seek support) as well as improvements in whānau housing, transport, business development, employment and education, and debt reduction and financial resilience.
10. Multiple reports appraising the social value of Whānau Ora programmes and initiatives using a Social Return on Investment methodology have consistently indicated large, positive returns. The methodologies used align with Level 1 or 2 standards of evidence, by either monetising expected effects of a programme based on an intervention logic, and/or monetising the effects participants experienced before and after an intervention.
11. This threshold of evidence used is appropriate for innovative, grassroots, locally led programmes and initiatives. However, robust evidence of impact of the whole Whānau Ora investment at a national level has not yet been collected. This would involve the use of comparison groups to isolate the causal effect of Whānau Ora.

There is a need for robust impact evaluation of Whānau Ora at a national level

12. Initial indications from an external review currently underway have identified opportunities for Whānau Ora to be aligned with a social investment approach, particularly relating to enhanced data and analytical capabilities. This includes Te Puni Kōkiri internal data platform, Te Kete Rauranga, which supports the development of data sharing agreements with Commissioning Agencies.
13. The Social Wellbeing Agency has also been using the IDI to undertake rapid robust evaluations of government interventions. The method has measured the impacts of Alternative Education on later life outcomes. The methodology was validated by replicating a robust, likely more resource-intensive outcomes evaluation of Teen Parent Units. The Social Wellbeing Agency considers Whānau Ora to be an appropriate intervention for a similar evaluation approach at a national level, subject to data availability.
14. To undertake an evaluation of this kind, de-identified data from Whānau Ora Commissioning Agencies about the individuals and whānau they have supported would need to be entered into the IDI. A statistical model can then compare the outcomes of those who received support from Whānau Ora with those who are statistically similar but did not receive Whānau Ora

support. This would strengthen the quality of evidence and provide greater confidence in the conclusions reached by other evaluations about the impact of Whānau Ora.

15. Whānau Ora was established to focus on outcomes that are defined by the needs of whānau. The benefit of this model is to place decision-making within the communities and whānau being served. With an increasing focus on high-level outcomes from Government, the need and expectation for community service providers to produce data on these high-level outcomes to support Government analysis of future investment must also be prioritised. The use of the IDI would enable analysis of the effects (both direct and secondary) on social outcomes that Government is focused on at a national level, such as childhood immunisations, employment and income, or involvement in the criminal justice system.

There are potential risks and limitations to work through which may take time

16. An important strength of Whānau Ora is its focus on outcomes as defined by whānau and community aspirations. This approach has enabled rich qualitative information about the experiences of whānau and communities, and what works for them.

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Stronger impact measurement can support future Whānau Ora and social investment decisions

19. The Whānau Ora delivery model has the potential to support social investment. The devolved commissioning model places decision-making within communities and allows the government to enable approaches that are responsive to needs of the whānau they serve. Whānau Ora's 'purchasing for outcomes' and flexible contracting approach would enable locally-led innovation and a focus on continuous improvement of services. Whānau Ora's grounding in Te Ao Māori and strong network of relationships mean it is well placed to reach communities with complex needs that are underserved by mainstream services.
20. Social investment involves better targeting resources within programmes, portfolios, or across portfolios for better outcomes. Whānau Ora's whānau-centric delivery model means it is a potential vehicle for cross-portfolio social investment. By applying a robust evaluation

methodology to quantify the impacts of Whānau Ora, government could consider investment in Whānau Ora alongside other social investment decisions in future.

Next steps

- 21. Subject to your direction, Te Puni Kōkiri will progress discussions with the Social Wellbeing Agency, StatsNZ and the Whānau Ora Commissioning Agencies to agree a way forward and timeframe to undertake robust evaluation of the impacts of Whānau Ora.
- 22. Te Puni Kōkiri will report back to joint Ministers by the end of March 2024 with a proposed timeline.

Contacts

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Appendix One: Whānau Ora Outcomes Framework

[See attached]



The Whānau Ora Outcomes Framework

Empowering whānau into the future



What is Whānau Ora?

Whānau Ora is a culturally-grounded, holistic approach to improving the wellbeing of whānau as a group, and addressing individual needs within the context of whānau.

Characteristics include:

- **building whānau capability** to support whānau self-management, independence and autonomy
- putting **whānau needs and aspirations at the centre** with services that are integrated and accessible
- **building trusting relationships** between service providers and whānau, and between government agencies and iwi
- developing a **culturally competent and technically skilled workforce** able to adopt a holistic, whānau-centred approach to supporting whānau aspirations
- supporting **funding, contracting and policy arrangements**, as well as effective leadership from government and iwi, to support whānau aspirations.

Whānau Ora is an innovative approach to improving whānau wellbeing that puts whānau at the centre of decision making. The Whānau Ora approach focuses on the whānau as a whole, and addresses individual needs within the context of the whānau.

Whānau are supported to identify the aspirations they have to improve their lives and build their capacity to achieve their goals.

Iwi and the Crown have agreed to a shared Whānau Ora Outcomes Framework to guide their work to improve outcomes for whānau.

Whānau Ora Outcomes Framework

The Outcomes Framework builds on the work of the Taskforce on Whānau Centred Initiatives that carried out extensive consultation in 2009. An additional element has been added to recognise the importance of the natural and living environments. The Outcomes Framework confirms that Whānau Ora is achieved when whānau are:

- self-managing
- living healthy lifestyles
- participating fully in society
- confidently participating in Te Ao Māori
- economically secure and successfully involved in wealth creation
- cohesive, resilient and nurturing
- responsible stewards of their natural and living environments.

The framework recognises the long-term and progressive change required for whānau to achieve these aspirational goals by including short, medium and long-term outcomes.

Short-term outcomes are the improvements in quality of life for whānau that can be achieved within four or five years. Medium-term outcomes focus on what can be achieved in five to 10 years. Long-term outcomes focus on 11 to 25 years.

Whānau Ora Outcomes Framework

Empowering Whānau Into The Future

Whānau Ora Outcomes	Whānau are self-managing & empowered leaders	Whānau are leading healthy lifestyles	Whānau are participating fully in society
Long term outcomes 11-25 years	<p>Whānau exercise rangatiratanga on a daily basis by being self-managing, independent, and making informed decisions.</p> <p>Whānau recognise they are repositories of knowledge about themselves and their communities, and they contribute to their communities' understanding of them.</p> <p>Whānau determine the nature of their own leadership according to their own traditions. They value and grow their leadership that represents their notions of a leader.</p> <p>Whānau are self-determining in the management, control and aims they determine for their collective assets and resources.</p>	<p>Whānau have a quality of life that meets their health needs and goals across their lifespan.</p> <p>Whānau members enjoy positive and functional relationships with others to meet their health needs and goals across their lifespan.</p> <p>Whānau are health literate and they have access to evidence-based information to make decisions about their health needs and goals.</p> <p>Whānau have timely access to exemplary and culturally adept health and disability services to meet their health needs and goals.</p>	<p>Whānau can demonstrate educational success by an increase in the number of Māori entering higher learning and professional careers.</p> <p>Whānau have opportunities for formal learning that equips them with the skills and knowledge to follow their chosen path to employment, advanced learning or self-fulfilment.</p> <p>Whānau are enjoying educational success across all ages.</p> <p>Whānau recognise, value and nurture leadership that supports and enables them.</p> <p>Whānau leaders actively engage with community leaders and institutions for collective good.</p>
Medium term outcomes 5-10 years	<p>Whānau are supported and enabled to take responsibility for their own lives and wellbeing.</p> <p>Whānau are making informed choices about the support they require and who they access support from.</p> <p>Whānau are able to draw on the skills of their own members to advance their collective interests.</p> <p>Whānau are actively participating in the management and growth of assets held in common.</p> <p>Whānau with disabilities participate equally in society.</p> <p>Whānau use, and understand the point of using, data both quantitative and qualitative to inform their decision making.</p>	<p>Whānau can model to other whānau members their ability to take personal responsibility for their own health and wellbeing by making choices about:</p> <ul style="list-style-type: none"> Living drug free and smoke free. Maintaining a healthy weight for their age and height. Achieving exercise and fitness regimes for heart health. Monitoring regularly the efficacy of their prescribed medicines or medical devices in conjunction with health professionals. Engaging in health screening programmes. The quality of the interpersonal relationships they have. 	<p>Whānau identify the added value they bring to a school community.</p> <p>Whānau can articulate the importance of early childhood education to the preparation of their children's future.</p> <p>Whānau choose and access culturally adept schools for their children's learning.</p> <p>Whānau can articulate and implement healthy living habits in the home that will support their children's educational success.</p> <p>Rangatahi are achieving the knowledge, skills sets and qualifications to pursue training and employment that provides them with financial security and career options.</p> <p>More whānau members are trained and serving as public, community & cultural leaders.</p> <p>Whānau have access to quality and timely services that are fully responsive to whānau priorities and whānau values.</p>
Short term outcomes 1-4 years	<p>More whānau develop pathways to independence, including from government assistance and intervention in their whānau life.</p> <p>Whānau are knowledgeable about the capability that exists in their whānau network, and begin to tap into it.</p> <p>Whānau decision-making and planning is informed by timely access to personal information and data which is held about them by government or other agencies.</p> <p>Whānau are aware of their interests in assets held in common and knowledgeable about their rights and responsibilities in regards to those assets.</p> <p>Whānau are planning for emergencies, and taking appropriate action such as having insurance and plans for asset replacement.</p>	<p>Increased number of whānau are setting and achieving personal health goals for their physical, emotional, spiritual and mental wellbeing.</p> <p>Increased number of whānau are improving their knowledge and practice in healthy eating and physical activity.</p> <p>Whānau are managing chronic health conditions, including eczema, asthma and diabetes. And know when and how to access support to manage their conditions.</p>	<p>Rangatahi Māori are achieving NCEA level 2 as a minimum qualification and increasing numbers are achieving level 3.</p> <p>Increased number of tamariki and mokopuna enrolled and attending early childhood education.</p> <p>Increased number of whānau entering tertiary education or other advanced areas of learning and leaving with qualifications.</p> <p>Increased number of whānau exercising their right to vote in national and local council elections.</p> <p>Increased number of whānau engaged in sport and/or clubs or other community groups including kapa haka and waka ama.</p> <p>Whānau are choosing the services they wish to access, on the basis of good information. Whānau are confident to access services and advocate in their own right.</p> <p>Successfully rehabilitate and reintegrate whānau who have had contact with the corrections system back into communities.</p>

Whānau Goals and Aspirations

Whānau and families are confidently participating in Te Ao Māori (the Māori World)	Whānau and families are economically secure and successfully involved in wealth creation	Whānau are cohesive, resilient and nurturing	Whānau and families are responsible stewards of their living and natural environments
<p>Whānau are secure in their cultural identity as Māori and actively participate in activities and events that celebrate their cultural make-up.</p> <p>Whānau are confident and proud that they are at least bi-lingual in Te Reo Māori and English/Te Reo Māori and NZ Sign, and able to transfer that knowledge to their members.</p> <p>Whānau access opportunities to be immersed in their culture and language in their communities.</p> <p>Whānau are major contributors to the cultural vibrancy and development of their own communities.</p>	<p>Whānau business leaders are innovative, entrepreneurial and successful.</p> <p>Whānau are active participants in research and development that advances their prosperity.</p> <p>Whānau are employed in occupations and positions that provide them with the income to achieve the standard of living they aspire to.</p> <p>Whānau have the knowledge and skills to manage their assets that enable them to achieve their life long aspirations.</p>	<p>Whānau relationships are positive, functional and uplifting of all members.</p> <p>Interpersonal skills between whānau members have improved and whānau conduct positive relationships and demonstrate good parenting.</p> <p>Whānau experience and contribute to the development and maintenance of safe and nurturing environments for themselves and their communities.</p> <p>Whānau access communication technology to sustain engagement with each other.</p> <p>All members of a whānau are valued.</p>	<p>Whānau exercise mana whakahaere (authority and control) and mana-kaitiaki over their natural environment.</p> <p>Whānau lead sustainable management of their natural environment.</p> <p>Whānau cultural, physical and spiritual wellness is nurtured by their access to, and engagement with, their natural environment.</p> <p>Whānau have choices about their living arrangements and in all cases, their living environment is safe, secure, warm, dry.</p>
<p>Whānau participate in their community using their language of choice.</p> <p>Whānau access cultural knowledge, engage in knowledge creation, and transfer that knowledge amongst themselves.</p>	<p>Increasing numbers of whānau are engaged in business, entrepreneurship, and innovation.</p> <p>Increasing numbers of whānau own their own businesses or benefit from the improved productivity and prosperity of their businesses.</p> <p>Whānau see improvements in the value of business they own.</p> <p>Whānau have increased financial literacy, improved access to capital and a practice of saving for key 'life' milestones.</p> <p>Whānau achieve at least a living wage.</p>	<p>Whānau live in homes that are free from abuse and violence.</p> <p>Whānau transform their lives through support from rehabilitation services (when needed).</p> <p>Whānau are confident to address crises and challenges.</p> <p>Whānau are stable, organised, and provide their tamariki with the best possible start in life.</p> <p>Whānau understand the importance of school attendance and support and encourage their tamariki and mokopuna to attend school.</p> <p>Rangatahi are supported and nurtured in their transition to adulthood.</p>	<p>Whānau are active participants and contributors to responsible and sustainable environmental management.</p> <p>Whānau access a range of housing options and the support required to pursue those options.</p> <p>Whānau are increasingly satisfied with their housing situation.</p> <p>Whānau increase the use of their land to provide housing, sustenance and food for themselves.</p>
<p>Increased numbers of whānau take up Te Reo Māori programmes.</p> <p>Increased number of whānau participating in iwi or cultural events or activities.</p> <p>Increased number of whānau registered with their iwi are exercising their democratic right in tribal elections.</p>	<p>Increased uptake by whānau in business training, skills acquisition, education and professional development.</p> <p>Increased numbers of whānau are self-employed, and whānau businesses are growing.</p> <p>Increased number of whānau improving their financial literacy.</p> <p>Whānau are engaged in savings and investment.</p>	<p>Parents build skills and strategies to nurture and care and provide for their children.</p> <p>Where necessary, whānau address violence, addiction, substance abuse, and risk of self-harm through increased uptake of affordable and culturally appropriate support services.</p> <p>Increase the number of tamariki from vulnerable whānau who are attending school on a regular basis.</p> <p>Relationships between partners are strong and supportive.</p> <p>Whānau are developing nurturing environments that provide for their physical, emotional, spiritual and mental wellbeing.</p>	<p>Increased opportunity for whānau to participate in environmental management practices.</p> <p>Increased number of whānau accessing services to improve the health of their homes.</p>

Whānau Goals and Aspirations

The Whānau Ora Outcomes Framework in action

Whānau Ora Partnership Group

The Whānau Ora Partnership Group provides strategic leadership to Whānau Ora. It includes six representatives of the Iwi Chairs Forum, and the Ministers for Whānau Ora (Chair), Finance, Health, Education, Social Development and Economic Development.

The Partnership Group agreed to the Whānau Ora Outcomes Framework. It uses the framework to set the direction, identify priorities and monitor progress towards the achievement of improved outcomes for whānau.

For most of the short-term outcomes, the Whānau Ora Partnership Group has identified the types of changes for whānau that are expected to be seen over four to five years. Indicators and measures have been set to monitor progress towards achieving the short-term outcomes.

Iwi

Iwi across the country invest in their whānau. The Whānau Ora Outcomes Framework aligns to iwi aspirations. It provides a point of reference to help iwi identify common priorities with government and others, for potential partnerships and investment in Whānau Ora outcomes.

Government agencies

The Whānau Ora Outcomes Framework helps guide government agencies in policy, planning and investment decisions aimed at improving outcomes for whānau. Government agencies are able to use the Outcomes Framework to identify opportunities and priorities for partnership and investment, both with other government agencies and with iwi.

Commissioning Agencies

The Whānau Ora Outcomes Framework assists Te Puni Kōkiri in commissioning Whānau Ora services and supports for whānau from the Whānau Ora commissioning agencies.

The commissioning agencies are non-government organisations that are contracted to fund and support initiatives which deliver the Whānau Ora outcomes. They act as brokers to match the needs and aspirations of whānau with initiatives that assist them to become more self-managing.

Commissioning agencies contract with established Whānau Ora provider collectives as well as other community providers such as iwi, marae, community organisations, education providers, church groups, land trusts and sports groups.

Commissioning agencies report annually to Te Puni Kōkiri on the provider and whānau outcomes achieved, as they relate to the overall outcome goals of Whānau Ora.

The Commissioning Agencies are:

Te Pou Matakana

For whānau in Te Ika-a-Māui – North Island
www.tepoumatakana.com

Te Pūtahitanga o Te Waipounamu

For whānau in Te Waipounamu – South Island
www.teputahitanga.org

Pasifika Futures

For Pasifika families across New Zealand
www.pasifikafutures.co.nz

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