

# WHĀNAU ORA



**Waikato Regional Leadership Group 2010-2013**  
**Achievements, Reflections & Legacies**

***Acknowledgements***

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## **Table of Contents**

Executive Summary	5
Background	6
The Waikato Whānau Ora Regional Leadership Group	8
Growing Effective Leadership	9
Communication & Information Sharing	12
Collaborative Work-Streams & Relationships	16
Capacity Development	20
Monitoring, Reporting & Quality Assurance	26
Ensuring the Sustainability of Whānau Ora (within Tainui)	33
 <b>References</b>	
Appendix 1: Terms of Reference	39
Appendix 2: Vision Statement	43
Appendix 3: Strategic Goals	44
Appendix 4: A similar cross-agency initiative – the Community Centric Regional Funding Model	45
Appendix 5: The WRLG’S method for developing a framework to measure, monitor and report on Whānau Ora outcomes, within and across, the TAINUI waka	48

## Executive Summary

This report summarises the Waikato Whānau Ora Regional Leadership Group's (WRLG) reflections about processes and mechanisms that have enabled, and/or hindered, the implementation of a Whānau Ora approach. It describes the journey towards Whānau Ora within the Tainui waka over the last 3 years. The report is structured around five strategic goals that have been identified in the WRLG's strategic plan, Te Ara Tipu o te Whānau, 2010-2013 and associated Action Plans.

This report discusses the WRLG's main achievements and challenges but also reflects on the effectiveness of systems, processes and strategies that aimed to:

- ☒ grow effective leadership
- ☒ communicate with whānau, service providers, Collectives, government agencies and communities
- ☒ establish collaborative work-streams & relationships
- ☒ strengthen capacity for advancement and innovation
- ☒ engage in monitoring, reporting & quality assurance, and
- ☒ ensure the Whānau Ora approach is sustainable in Tainui

It is hoped this information will be of use to whānau, service providers and decision-makers involved with the next stage of Whānau Ora implementation.

## Background

Whānau Ora was launched in May 2010, with an overall budget of \$164 million to be spent over four years. Jointly implemented by Te Puni Kōkiri (TPK) and the Ministries of Social Development (MSD) and Health (MoH), Whānau Ora has aimed to transform the delivery of health and social services and empower families to achieve their maximum potential.

Whānau Ora is an inclusive and culturally anchored approach that is based on a Māori world view of health. It assumes focusing on the wellbeing of a whānau will be beneficial for individual family members as well as their wider hapū, iwi, community. Whānau Ora has given health and social services a mandate to work across sector boundaries that can create obstacles to care. The Whānau Ora approach supports working in a co-operative and collaborative manner placing whānau, and whānau needs, firmly at the centre of any, and all, support plans (Boulton, Tamehana & Brannelly, 2013; Durie, 2012; Families Commission, 2009).

As a framework for measuring the outcomes of service delivery, the Taskforce on Whānau-Centred Initiatives (2010) has identified the following underlying goals for whānau:

- ☑ self-management and leadership
- ☑ whānau are agents of change, they have a role in promoting healthy lifestyles
- ☑ whānau have the right to participate fully in society
- ☑ confident participation in Te Ao Māori is a pathway towards Whānau Ora
- ☑ whānau need to be economically secure and successfully involved in wealth creation
- ☑ every whānau should be cohesive, resilient and nurturing

Since 2010, thirty-four Whānau Ora Collectives, comprising a nationwide network of more than 160 health and social service providers, have been contracted to develop new and innovative ways of delivering whānau-centred services. The viability of each Collective has been scrutinized, within a process of engagement, that required the identification of strategies for managing relationships and risk, infrastructure development, capacity building, monitoring and evaluation, action research and innovation. Within each Programme of Action (POA), Collectives have had to demonstrate how their particular approach would ensure better outcomes for whānau. This information formed the basis for a Business Case, or operational document, which outlines the specific deliverables, timelines and resources required to implement each Collective's particular approach to the Whānau Ora model.

The Whānau Integration, Innovation and Engagement Fund (WIIE) has also been available to assist the development of whānau capacity for self-reliance and self-management. The WIIE fund invests in activities that strengthen connections, develops leadership skills and generally builds the knowledge and capabilities that will enable whānau to achieve their goals and aspirations (Te Puni Kōkiri, 2010).

The WIIE fund is managed by Te Puni Kōkiri and has two categories of applicants. Under Category 1, service providers who are part of an established Whānau Ora Collective can apply

for funding on behalf of whānau they are working with. Category 2 applicants are other health and social service providers and non-government organisations such as Rūnanga, marae committees, Ahu Whenua and whānau trusts. By November 2012, the WIE fund had helped more than 3,000 whānau, representing approximately 33,000 individuals, to create, and in some cases implement, an action plan towards shared goals and aspirations.

To ensure this investment in whānau-centred initiatives was aligned with local priorities, and contributed in a positive and realistic way, the Minister Responsible for Whānau Ora (Hon. Tariana Turia) established ten Regional Leadership Groups (RLGs) based on the geographic boundaries of Te Puni Kōkiri. The RLGs were appointed for a 3-year term and comprised a mix of community members and representatives from Government's stakeholder ministries. Each RLG has been able to determine how it will operate but a central Governance Group retained overall responsibility. As defined within their Terms of Reference (Appendix 1), the RLG's role has been to:

- ☒ provide strategic leadership and positive representation of Whānau Ora at the local and regional level
- ☒ foster communications and relationships within regions
- ☒ ensure coordination with other, local and regional, initiatives and services
- ☒ provide advice and recommendations on the selection of Whānau Ora service providers, the development and implementation of Programmes of Action, whānau-centred services and priorities and other issues of relevance to the Whānau Ora Governance Group
- ☒ monitor and report on results, outcomes, best practice examples/models and implementation issues in their region

On 16 July 2013, Minister Turia announced significant changes to the model for delivery of Whānau Ora. The Governance Group will be superseded by a Crown-Iwi Partnership and three (3) non-government organisations (NGOs) who will be contracted to commission local-level whānau-centred initiatives.

In addition to the Collectives, a range of other entities - including church groups, marae, land trusts and sporting groups - will be eligible for contracts to deliver services. Sir Mason Durie, Chair of the current Governance Group, says "the new model reflects the importance of community-based leadership and decision-making to the continued growth and success of Whānau Ora as a social, economic and cultural development approach for whānau and families" (Te Puni Kōkiri, 2013).

The new model is expected to have a greater focus on commissioning trials and innovations which build whānau capacity for self-management. Such announcements foreshadowed the wind-down of Regional Leadership Groups, at the end of December 2013. It is anticipated the commissioning agencies will be operational, and complete a limited funding round, by the end of June 2014. Until then, the Governance Group and Te Puni Kōkiri will continue to administer the WIE fund and manage the overall transition.

## The Waikato Whānau Ora Regional Leadership Group

The Waikato Whānau Ora Regional Leadership Group (WRLG) was one of the first RLGs to be established by Minister Turia. All ten members were appointed on 16 July, 2010 and there have been no resignations or replacements during their 42 month term.

The WRLG comprises 7 community members and 3 representatives from government agencies, its members have a wide range of expertise in health and social services, hapū and iwi development, research, governance, business enterprise and the advancement of Te Ao Māori. Collectively, the WRLG members and Te Puni Kōkiri staff have a strong platform of strategic alliances, whakapapa links, networks and relationships throughout the Tainui rohe.

**Co-Chair:** Harry Mikaere (Hauraki)  
**Co-Chair:** Tania Hodges (Waikato, Ngāti Ranginui, Ngāti Kahungunu, Tuwharetoa)

**Members:** Piritata Kirkwood (Waikato, Maniapoto, Raukawa)  
Pat Seymour (Ngāpuhi, Ngāti Whatua)  
Denise Messiter (Hauraki, Ngāti Pukenga)  
Aroha Terry (Waikato, Maniapoto)  
Stephanie Palmer (Hauraki, Ngāti Porou ki Harataunga)

**Government Representatives:** Ditre Tamatea (Ngāti Porou, Ngā Ariki, Ngai Tai, Rongowhakaata)  
Te Rehia Papesch (Waikato, Maniapoto, Ngāti Porou, Ngāti Whakaue)  
Gail Campbell (Ngāti Porou, Rongowhakaata, Te Whakatohea, Ngati Kahungunu)

**TPK Staff:** Koroneihana Cooper (Pouwhakahaere, Pat Nathan, Tracey Wetere, Pareaute Panapa-Soloman, Stacey McGregor, Carl Wilson, Maea Marshall, Eva Paurini, Kirstin Te Amo



Tania Hodges (co-chair), Maea Marshall (administrator), Harry Mikaere (co-chair), Denise Messiter, Ditre Tamatea (Waikato District Health Board), Stephanie Palmer, Pat Nathan (Kaiwhakarite), Eva Paurini (administrator) Te Rehia Papesch (Ministry of Social Development), Pat Seymour, Piritata Kirkwood, Gail Campbell (Te Puni Kōkiri), Aroha Terry

## Growing Effective Leadership

The WRLG's commitment to growing effective leadership for development and implementation of the Whānau Ora approach, within the Waikato region, was firmly underpinned by:

- ☑ recognition of Te Tiriti o Waitangi as the defining document for working relationships between Tainui Iwi and the Crown
- ☑ a vision statement which upholds the importance of transformative change that makes a positive difference to whānau (Appendix 2)
- ☑ a strategic plan comprising five overarching directions, and associated work plans, that have been informed by the socio-economic needs of whānau, opportunities for inter-agency collaboration and investment themes that would have maximum impact in terms of positive outcomes for whānau in Waikato (Appendix 3)
- ☑ the development of action plans for communication, distribution of information and relationship building
- ☑ an expectation the WRLG would have responsibility for governance oversight on issues associated with contracting, quality assurance, working with Collectives, inter-sectorial relationships, action research themes, investment in whānau plans and reporting of outcomes against their own strategic plan for implementation of the Whānau Ora approach
- ☑ acknowledgement of the need to quickly build RLG capacity for governance, administration, monitoring and reporting

## Achievements

- the WRLG created a vision, strategic plan and annual work streams for Whānau Ora investment and decision-making, Te Ara Tipu o te Whānau, 2010-2013
- established systems and processes for administration, decision-making, dissemination of information, engaging with whānau, quality assurance, distribution of funding, monitoring, reporting and ensuring equitable access to funding opportunities
- formed of protocols for managing relationships, conflicting roles, communications, media coverage, working with Collectives, reporting to the Governance Group and timely review of WIIE applications for funding
- built relationships with service providers, government agencies, whānau and communities throughout the rohe
- developed and delivered training opportunities for whānau, service providers, TPK staff and RLG members
- invested in community events and celebrations, such as, the Hauraki Family Violence Symposium, Tainui Games and Ngāti Haua Whānau Ora Day



- established two inter-sectorial Whānau Ora networks (WON), comprising a range of government agencies and service providers, who scoped opportunities for collaboration and integrated service development
- helped to establish four, Waikato-based, Whānau Ora Collectives, comprising 20 service providers located throughout the region
- developed skill sets for assessment and review of key documents including Expressions of Interest (EOI), Letters of Engagement, business case proposals, Programmes of Action, service specifications and WIIE fund applications
- strengthened whānau capacity to identify their own aspirations, write an action plan and, subsequently, engage in implementation
- strengthened NGO/service provider/umbrella group capacity to foster and facilitate the whānau planning process
- fostered discussions, and training opportunities, which helped to clarify the role, function and particular skillsets the so-called “navigator” or “planner” needs to work effectively with whānau
- invested **\$1,142,687** in strengthening the leadership capacity of Waikato whānau
- enabled **235** whānau, throughout the Waikato rohe, to identify collective goals and aspirations and write an Action Plan that ensured this dream was achieved
- funded **19** whānau to implement their Action Plan

## Challenges

- Minister Turia had hoped the systems and processes for regional implementation of Whānau Ora initiatives would evolve over time but this created an environment of uncertainty in which the Governance Group (GG) often had to make rapid decisions without RLG consultation
- the GG, TPK Head Office and Lead Advisers retained overall responsibility for governance within each region
- key policies, processes and decisions were generally progressed at the national level, without local involvement, such as Navigator contracts, templates for data collection, the framework for monitoring Whānau Ora outcomes and, in some instances, the allocation of regional WIIE funds
- general willingness to engage with the Whānau Ora model of service delivery was impacted by the emergence of inherently similar, better resourced, cross-sector initiatives, such as the Community Centric Funding Model (Appendix 4); Capability Investment Resource for Provider Organisations, Social Sector Trials, the Social Bonds project and Investing in Services for Outcomes

## Reflections

- some of the WRLG's strategies, work plans and recommendations had to be re-prioritised because the GG had already planned their agenda which prioritised different goals, processes, directions
- capacity to grow effective leadership was undermined by centralised systems for governance oversight and cross-government discussions about regional initiatives
- investments in communication and evaluation provided valuable insights which helped to inform decision-making about work plan themes, training needs and opportunities for collaboration
- compared with other RLGs, Waikato had a cautious approach to the distribution of WIIE funds
- information gaps and uncertainties about budget allocations undermined the WRLG's capacity for leadership

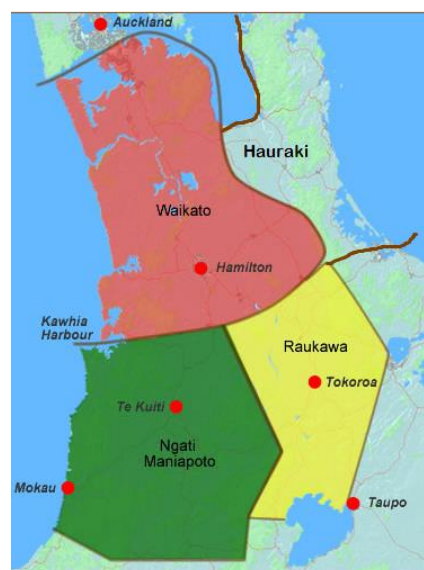
## Communication & Information Sharing

The WRLG's vision and strategic goals emphasized the need for a communication plan which ensured:

- ☑ Whānau Ora is actively promoted throughout the Waikato rohe
- ☑ information is clear, accurate, relevant, accessible and disseminated in a timely and appropriate manner
- ☑ meaningful relationships, and opportunities to share key learnings, within and across stakeholders, including whānau, communities, service providers, Collectives and government agencies
- ☑ pathways for collaboration and investment are identified
- ☑ service providers can work together, build on synergies and strengthen collective capacity for delivery of the Whānau Ora approach in Waikato

### Achievements

- the WRLG held monthly meetings and received regular updates on progress within the Waikato Collectives
- WRLG meetings were held in outlying communities on alternative months, notably - Te Kuiti, Tokoroa, Hauraki, Huntly and Mangakino - to ensure information about WIIIE fund opportunities reached whānau in these regions
- WRLG co-chairs attended quarterly meetings with other RLG chairs and the Governance Group to share information about respective challenges and directions
- Representatives from the WRLG attended the national Whānau Ora hui, and participated in training workshops, for Collectives, stakeholders and RLG members
- a Register of Interest was established for follow-up and distribution of national updates, media statements, press releases, pānui, FAQs, application forms, application guidelines and key documents or reports such as the Taskforce Report on Whānau Centred Initiatives 2010; Whānau Ora Transforming our Futures 2011; Whānau Ora Working Group Report 2012 and Report on the Whānau Ora Planning Workshop 2012 – this information was also available through the TPK website and regional offices
- communication and information sharing was facilitated by ensuring Collectives were located within each the four main regional boundaries for Waikato, as defined by Te Puni Kōkiri

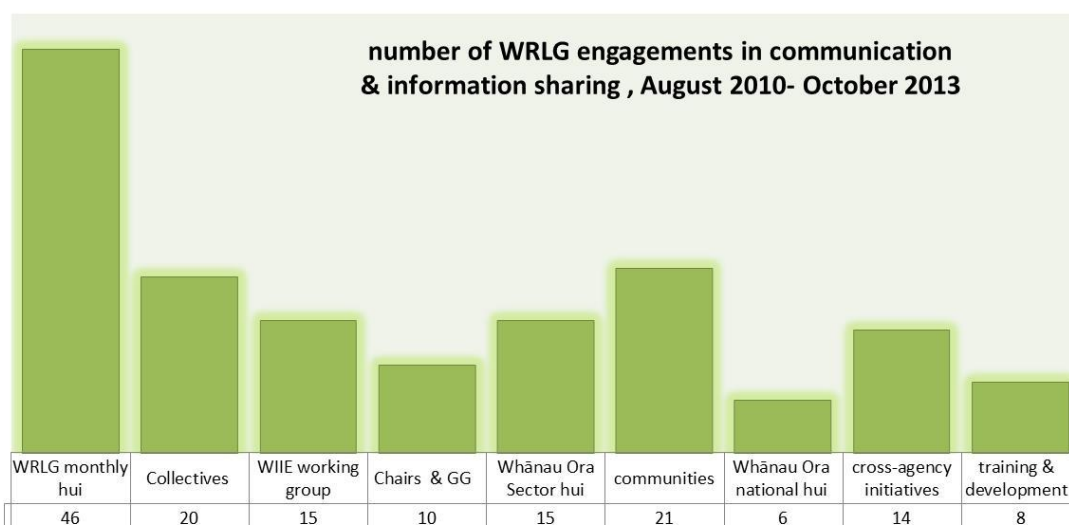


Waikato regional boundaries

TPK regional boundaries	Kirikiriroa	Waikato	Maniapoto	Raukawa	Hauraki
Waikato towns, regions, districts, communities	Hamilton City	Ngaruawahia Huntly Morrinsville Raglan Pukekohe Auckland Te Aroha Matamata	Otorohanga Waitomo Te Awamutu Te Kuiti Piopio Benneydale Kawhia Taumaranui Mōkau Marokopa Rereahu Ruapehu	Cambridge Putaruru Rotorua Tokoroa Mangakino Taupo Tirau	Thames Coromandel Whitianga Pauanui Turua Waihi Paeroa
Provider Collectives	NUMA	Te Ope Koiora	Raukawa-Maniapoto Alliance		Hauraki

Alignment of Provider Collectives with towns and communities within the regional boundaries of Waikato

- three of the four Waikato Collectives attended the WRLG's monthly hui to share information about their vision, objectives, achievements, challenges
- WRLG members participated in some of the Collective's internal meetings to share information and/or provide general support, when needed
- WRLG members informally engaged with a range of whānau, community groups, marae, hapū, Rūnanga, schools, land trusts, service providers and government agencies in their own towns, communities, regions
- WRLG co-chairs facilitated round-table discussions amongst stakeholders participating in the two Whānau Ora Networks (WON) to identify opportunities for innovation, collaboration and addressing the needs of whānau
- the WRLG's government representatives reported on, and/or were appointed to, committees involved with the development of other cross-sector initiatives, including
  - MSD's Community-Centric Regional Funding Model, Community Response Forum, Investing in Services for Outcomes and Social Sector Trials, and
  - the MoH Social Bonds Project
- the WRLG invested in toolkits, resources and training opportunities which aimed to share information, transfer knowledge, strengthen whānau/service provider skillsets and build capacities
- between August 2010 and October 2013, the WRLG:
  - engaged in **155** information-sharing activities, primarily discussions with stakeholders involved in the Provider Collectives (13%), Whānau Ora Networks/Sector Hui (10%) and face-to-face contact with communities (14%), and
  - communicated with **74** WIIE applicants, including **30** Whānau Trusts and **44** umbrella organisations, representing **235** whānau throughout the Waikato rohe



## Challenges

- Whānau Ora was rapidly introduced, without opportunity for TPK staff and RLG members to prepare for administration and distribution of the WIIE fund, early communications were sometimes inconsistent
- Wellington-based Lead Advisers managed relationships with the Waikato Collectives, which meant the WRLG was not directly involved in communications about progress within their own rohe
- the timeliness of systems for dissemination of information about policy, contracting and financial issues impacted on the WRLGs capacity to provide accurate information
- the meaning and implications of concepts embedded within the Whānau Ora contracting process were not clearly defined, for example, working definitions were needed for terms like navigator, planner, facilitator, whānau plan, action plan, vulnerable whānau, hard to reach whānau, needs assessment and innovation
- the roles and functions of a Kaitoko Whānau (funded by TPK under the Whānau Social Assistance Programme) were similar, almost identical, to the Whānau Navigator (also administered by TPK under the WIIE fund), this made it difficult to differentiate the processes for contracting, monitoring and quality assurance
- the WRLG was not involved in discussions about the action research themes that Waikato Collectives chose to explore, this reduced the WRLG's capacity to identify synergies, share information and facilitate collaboration
- information gaps and budget uncertainties reduced the opportunities for leadership, communication and information sharing

- the WIIE fund was introduced as an opportunity for action plans that facilitated engagement, integrated service delivery and innovation but the focus changed to assessing the health and social needs of so-called vulnerable, hard-to-reach whānau

## Reflections

- a flexible approach was important for networking and engagement with whānau, service providers and communities, the process of WRLG engagement took various forms such as sitting on committees and participating in workshops, seminars, community events and discussion forums
- the decision to hold WRLG meetings in outlying communities, on alternative months, greatly enhanced opportunities for whakawhanaungatanga, promotion of the WIIE fund and learning about the aspirations and dreams of whānau in those communities
- investments in the development of region-specific information resources would have been beneficial, for example, a list of people with the skills to facilitate whānau planning hui and a directory of Whānau Ora service providers
- the Whānau Ora Networks were effective as a strategy for sharing information but additional techniques were needed to identify synergies, pathways and opportunities for collaboration and/or integrated contracts
- the schedule for Whānau Ora Network meetings needed refinement, for example, the larger network of Waikato-wide providers and agencies could have met quarterly but the smaller Hamilton-based/north Waikato network was able to meet more regularly
- WRLG participation in Whānau Ora national hui and training workshops were beneficial for networking, sharing information, disseminating resources, workforce development and identifying innovative strategies and techniques that may be of use for whānau and service providers in Waikato, eg this led to the WRLG's development of training workshops on the use of Results Based Accountability (RBA) data collection and analysis techniques
- WRLG community members had valuable knowledge about local whānau who would benefit from WIIE funding opportunities but their capacity to share information, engage with whānau directly and assist the resolution of obstacles, such as finding an appropriate umbrella group, was under-utilized due to concerns about perceived conflicts and limitations in the Terms of Reference

## Collaborative Work-Streams & Relationships

The WRLG's strategic plan has a vision of strong relationships, collaboration and inter-sectorial work-streams, it was envisaged this would involve:

- ☑ Establishing relationships within and across whānau, communities, service providers, government agencies and iwi
- ☑ alignment with the directions and priorities of other RLGs, TPK head office and the Whānau Ora Governance Group
- ☑ investments in high trust contracts and decision-making frameworks

### Achievements

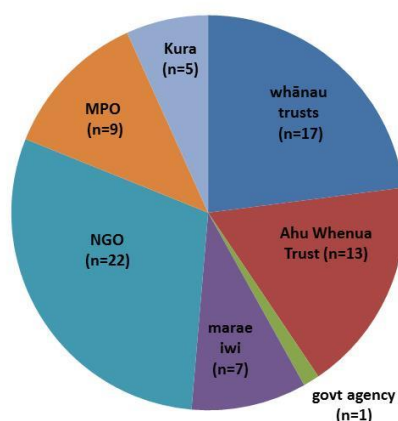
- the establishment of four Provider Collectives, representing collaborations amongst 20 service providers within the four main regions of Tainui, ie:
  - **Te Ope Koiora o Waikato-Tainui:** Ideal Success Charitable Trust, JTP Consultants Limited (Te Kotahitanga), Ngā Miro Health Trust, Raukura Hauora o Tainui Trust, Raukura Waikato Social Services, Solomon Group Education and Training Academy, Te Hauora o Ngāti Haua, Waahi Whānui Trust
  - **Raukawa-Maniapoto Alliance:** Maniapoto Māori Trust Board, Raukawa Charitable Trust, Ngāti Maniapoto Marae Pact Trust, Taumarunui Community Kōkiri Trust
  - **Hauraki Whānau Ora Collective:** Hauraki Māori Trust Board, Te Korowai Hauora o Hauraki, Te Kupenga o Ngāti Hako, Te Ahi Kaa Social Services, Te Whāriki Manawāhine o Hauraki
  - **National Urban Māori Authority (NUMA) Collective (Waikato):** Te Rūnanga o Kirikiriroa and Te Kōhao Health Ltd (Waikato based Providers)
- the establishment of two Whānau Ora Networks (WON), covering Hamilton (a project based approach) and the wider Waikato region (strategic information exchange), with representation from the:
  - WRLG
  - Waikato-based Whānau Ora Provider Collectives
  - other NGOs within the community
  - various government agencies, including Te Puni Kōkiri, Ministry of Social Development, Ministry of Health, Waikato District Health Board, NZ Police, Inland Revenue, Housing New Zealand, Ministry of Education and the Department of Corrections.

- the WONs identified various opportunities for further discussion including charter schools, benefit entitlements, the National Health Committee’s Rural Access model and possible contracts with Inland Revenue, but the main achievements were:
  - implementation of the WON (Hamilton) 100 Whānau project in which 100 homes were identified for insulation through an MoH partnership with the Energy Efficiency Conservation Authority (EECA)
  - disseminating information about Literacy Aotearoa programmes, Results Based Accountability (RBA) training and the Niho Taniwha model for whānau planning
  - discussion about the indicators which could be used to measure Whānau Ora outcomes within and across the Tainui region, such as, data gathered through the Māori Social Survey (Statistics NZ) and Poverty Action Waikato measures of poverty
  - NZ Police/Te Ope Koiora collaboration to implement an early intervention programme of alternative actions and resolutions for at-risk Māori (youths and adults) in Huntly
- MSD sponsorship of free “pick up and go” RBA guidelines and toolkits, for whānau and service providers, to improve knowledge and capacity for the measurement of Whānau Ora outcomes
- WRLG investment in the development and delivery of training opportunities for Collectives, RLG members, TPK staff, whānau navigators/facilitators and service providers, including:
  - endorsement of the Niho Taniwha template for writing whānau plans
  - practical workshops on the use of RBA techniques
  - Navigators hui, and
  - WIIE fund assessment criteria, contracting process, benchmarking of costs and reporting templates
- Two secondments during which government agencies invested in collaborative work streams and relationships, notably:
  - an MSD secondment to the WRLG for analysis of **38** WIIE plans to informed development of a Whānau Ora brochure and the MSD’s Enabling Employment & Training Plan
  - an MoH secondment to assist development of the Raukawa-Maniapoto Collective and gather information about service delivery gaps in South Waikato



- WIIIE fund contracts with **30** Whānau Trusts and **44** umbrella groups including Kura (n=5), Marae (n=2), other iwi-based groups (n=5), Ahu Whenua land trusts (n=13), whānau trusts (n=17) and other NGO/community based groups (n=22) throughout the Waikato rohe

**WIIIE fund contract holders by the number in each category**  
(based on total distributions, 2010-2013)



## Challenges

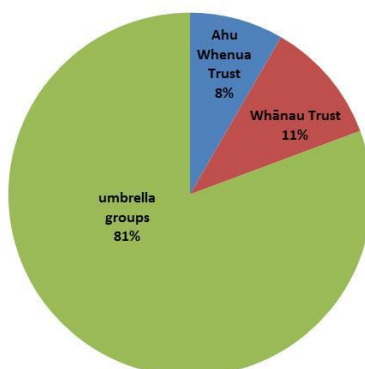
- it was difficult to establish relationships with whānau directly, many did not have a process for collective decision-making or their own legal entity and some were unwilling to engage through an umbrella group
- Kura and Marae were well-placed as umbrella groups for engagement with whānau but lacked relevant skill sets and were generally reluctant to enter into a contractual relationship in which they facilitated the development of whānau plans
- the Waikato Collectives were at different stages of development and had their own priorities, it was difficult to find synergies that could provide a platform for integrated contracts or collaboration, for example, NUMA placed priority on housing and home ownership whereas Te Ope Koiora was focused on youth justice and recruitment/training of Navigators
- for various reasons, a number of service providers wanted to exit their alliance with Waikato Collectives
- WON set up a working group to stock-take information about regional activities, synergies, alignment with Whānau Ora outcomes and priorities, it was envisaged this information would form the basis for development of a long-term strategic plan, action plan and business case, this important task was not completed
- compared with other cross-government initiatives, such as the Social Sector Trials and Investing in Services for Outcomes, WON was under-resourced,

indeed it was not funded at all, and, therefore, lacked the momentum and drive to make progress

## Reflections

- WON provided a unique opportunity for government agencies and service providers to share information, brainstorm innovative strategies and identify opportunities for collaboration and integrated contracts, including WIIE fund distributions, a case-specific approach to resolution of whānau needs may have been more effective
- Terms of Reference which clarified the WON's structure, administration process, objectives and financial commitment from government agencies (over and above any WIIE fund investment) would have increased the likelihood of positive gains
- WON's potential, as a catalyst for collaboration, was undermined by heavy workloads, competing initiatives, inadequate resourcing and the lack of a clear framework for discussion and decision-making
- WIIE fund contractual relationships were mainly formed with umbrella groups (81%), relatively few contracts were signed with whānau directly (19%)
- Ahu Whenua (8%) and Whānau Trusts (11%) were effective, but under-utilised, as a conduit for establishing contractual relationships with whānau

**WRLG distributions by the type of contract holder**  
(based on total distributions, August 2010 to October 2013)



## Capacity Development

The WRLG's vision for capacity development was underpinned by the establishment of systems, processes and relationships which ensured:

- ☑ whānau are engaged in Whānau Ora pathways and activities
- ☑ whānau have the capacity for advancement and innovation, including the skills to write, and implement, their own action plans
- ☑ whānau have the capacity and opportunity to participate in Te Ao Māori
- ☑ WIIIE fund investments strengthened regional capacity for Whānau Ora models of service delivery
- ☑ a strengths-based approach is used to assess whānau needs, rather than simple checklists and templates which have been designed to highlight deficiencies
- ☑ Whānau Ora champions and success stories are promoted, and celebrated, within Waikato and nationally

## Achievements

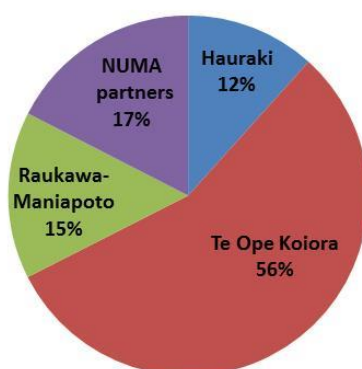


- **\$3,429,654** of the national Whānau Ora WIIIE fund was invested in strengthening the capacity of service providers, umbrella groups and whānau in the Waikato rohe
- **\$2,286,997** was invested in strengthening the capacity of four Provider Collectives to implement Whānau Ora models of service delivery
- **\$1,526,725** was invested in strengthening capacity for engagement in Whānau Ora pathways, activities and service delivery models within the Waikato regional boundary
- **\$1,173,671** was invested in strengthening capacity for engagement in Whānau Ora pathways, activities and service delivery models within Kirikiriroa (Hamilton City)
- **\$1,142,687** was invested in strengthening the skill sets and capacities of whānau

- **\$921,887** was invested in umbrella groups, to build capacity for facilitating the writing and implementation of whānau action plans, of the funding that was given to umbrella groups:
  - NGOs & MPOs received **\$798,007** (87%)
  - marae and iwi groups received **\$57,650** (6%)
  - Kura and Schools received **\$46,230** (5%)
  - Government agencies received **\$20,000** (2%)
- **\$410,313** was invested in strengthening the capacity for engagement in Whānau Ora pathways, activities and service delivery models within the Raukawa-Maniapoto rohe
- **\$318,945** was invested in strengthening capacity for engagement in Whānau Ora pathways, activities and service delivery models within the Hauraki rohe
- **\$220,800** has helped Ahu Whenua and Whānau Trusts to write and/or implement their own Action Plans
- **245** whānau received funding to write an Action Plan that identifies their aspirations and describes how this vision can be achieved
- **19** whānau received funding to implement their own Action Plan

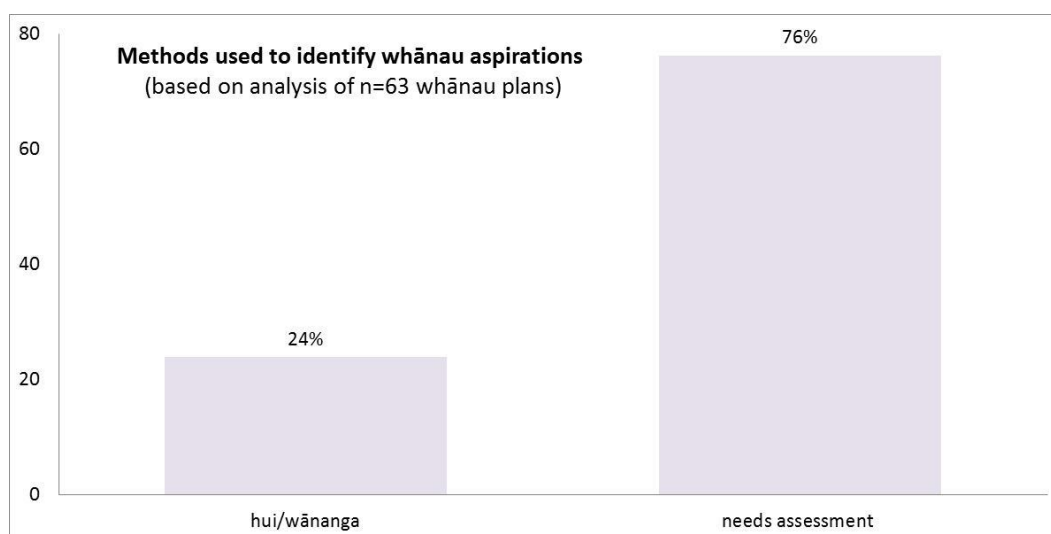
WIIE fund disbursements, 2010-2013			
	WRLG distributions for Whānau Plans (at 31/10/2013)	GG distributions to Collectives (at 31/08/2012)	regional total
Hauraki	\$252,195	\$66,750	\$318,945
Waikato	\$245,895	\$1,280,830	\$1,526,725
Raukawa-Maniapoto	\$211,513	\$198,800	\$410,313
Kirikiri-roa	\$433,084	\$740,587	\$1,173,671
	<b>\$1,142,687</b>	<b>\$2,286,967</b>	<b>\$3,429,654</b>

**distribution of WIIE funds to Provider Collectives**  
(based on total distributions, August 2010 to October 2013)



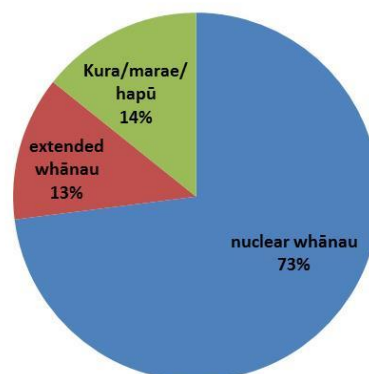
## Challenges

- GG decision-making about the distribution of funding, process for engaging whānau, role of WRLG members, target groups and purpose of a whānau plan hindered investments in capacity building, for example:
  - \$100K WIIE fund contracts were awarded to several provider organisations in Waikato without WRLG consultation
  - RLGs had to identify community-based NGOs, who were not affiliated with Provider Collectives, that would be eligible for \$80K Navigator Contracts to umbrella up to 20 whānau plans. To avoid confusion these positions were termed Whanau Planners (see below)
  - Navigator Contracts reduced the funding that was available for direct engagement with whānau and created confusion about the purpose, role and definition of Navigators, as this term had been coined for Collectives.
- uncertainties about annual budget allocations and the sustainability of approving \$20K grants for implementation plans impacted on the WRLGs investment in capacity building, for example, an overspend of the WRLG's WIIE fund allocation in 2012-13 reduced the amount available for distribution in 2013-14
- it was unclear whether WIIE funds should be invested in building the capacity of national organisations, such as Parentline, Plunket and the Māori & Pacific Indigenous HIV/AIDs Foundation
- when creating whānau plans, MPO/NGO umbrella groups, particularly those who also delivered Kaitoko Whānau services, tended to use templates for the assessment of health and social needs, rather than strengths-based techniques, such as hui and wānanga, which empowered whānau to identify their own aspirations and pathways towards self-determination



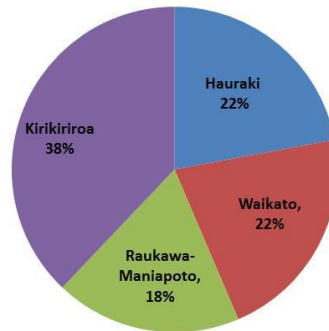
- Provider organisations and umbrella groups tended to employ entry-level staff in Navigator/Whānau Planner roles when higher skillsets were needed to create useable action plans, identify policy synergies, monitor outcomes and broker innovative solutions across government agencies
- whānau who are disadvantaged by day-to-day hardship and poverty find it hard to engage in discussions about their aspirations, a structured approach is needed to firstly address basic needs then create opportunities for innovation and advancement
- It was difficult to ascertain whether WIIE fund investments increased capacity for whānau participation in Te Ao Māori as this information was not routinely collected, however:
  - strengthening Māori identity was clearly an important aspiration for whānau, it was one of the top aspirations identified in 63 whānau plans (17%)
  - of the whānau who wanted to strengthen their identity most talked about more involvement with their ancestral lands; participation in Te Ao Māori; learning about whakapapa and tikanga; being able to speak Te Reo Māori and succession planning so future generations would always have this knowledge
- the vast majority of plans focused on the needs of a nuclear whānau (73%), relatively few considered the aspirations, or needs, of extended whānau (13%) and/or hapū (14%)

Target group of WIIE fund investments  
(based on analysis of n=63 whānau plans)



- decisions about the allocation of regional WIIE funds for capacity building were sometimes progressed at a national level
- regional inequities in the distribution of WIIE funds for whānau plans may not be addressed before implementation of the new Commissioning model

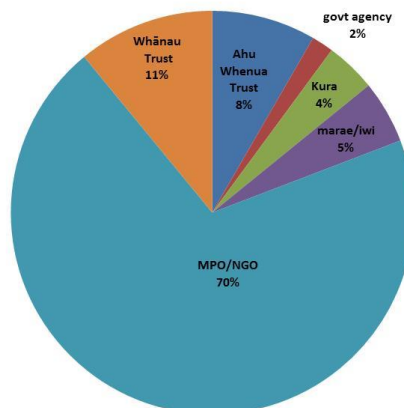
**regional allocation of WIIE funds for whānau plans**  
(based on total distributions August 2010 to Oct 2013)



## Reflections

- compared with other RLGs, Waikato had a cautious approach to the distribution of WIIE funds for whānau plans
- inequities in the distribution of WIIE funds to Provider Collectives largely reflected the size of target populations and different stages of progress towards establishment
- WON was highly effective as a mechanism for identifying 100 whānau who would benefit from the EECA home insulation project but lacked the capacity to identify other opportunities for collaboration
- the Collectives engaged in round-table discussions about working together and moving forward within the region but additional skill sets were needed to maximise the opportunities for advancement
- NGOs and Māori Provider Organisations (MPO) received the highest proportion (70%) of WIIE fund investments in capacity to create whānau plans, this approach tended to produce plans which aimed to address basic health and social needs

**WRLG investments in whānau plans by the type of contract holder,**  
(based on total distributions, August 2010 to October 2013)



- TPK staff were not trained to assess, or engage in discussions, about the quality of whānau plans, the health and social needs of disadvantaged whānau or the effectiveness of whānau facilitators/navigator/planners, this is a skill set that developed over time and specifically for the WIIE contracting process
- WRLG community members had the capacity to increase the rate of WIIE fund engagements with whānau in small towns and outlying regions, through local networks and relationships, but this was limited by concerns about perceived conflicts, budget uncertainties, TPK process and their Terms of Reference
- Investment in a system, and process, for identifying Whānau Ora success stories and champions, within the Tainui region, would have been of value but a staffing and resource commitment was needed to scope potential source material, record before and after stories, take photos and/or support whānau to tell their own story. Whānau Ora Champions were appointed to lead this work at a national level.



## Monitoring, Reporting & Quality Assurance

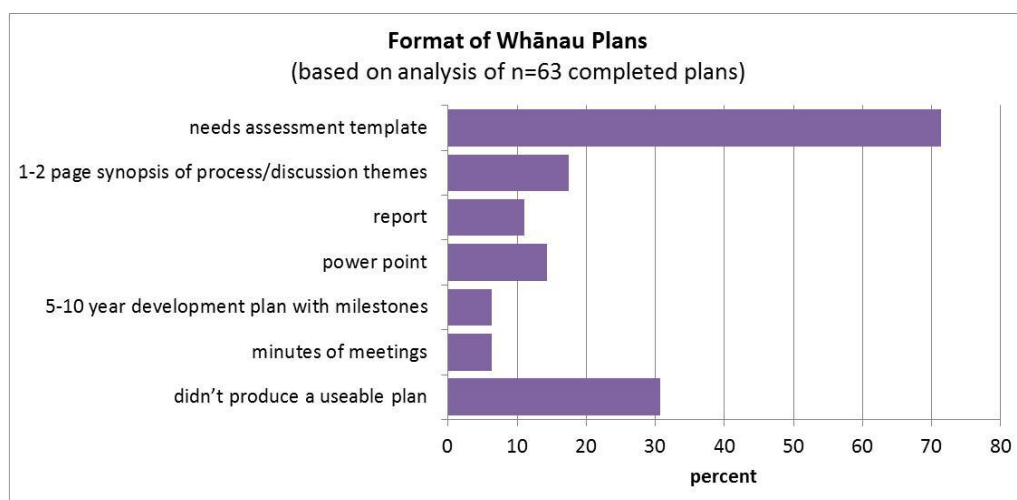
Te Ara Tipu o te Whānau, 2010-2013 describes the WRLG's approach to monitoring, reporting and quality assurance, this envisaged:

- ☑ Monitoring the progress, and performance of, the WRLG, WIIE fund and Provider Collectives throughout the Waikato rohe
- ☑ reporting against the strategic goals identified in Te Ara Tipu o te Whānau 2010-2013 as well as the Whānau Ora Outcomes Framework
- ☑ data collection and monitoring techniques which informed decision-making about WIIE fund investments and the advancement of Whānau Ora in Waikato including enablers, barriers and inequities
- ☑ capacity to measure Whānau Ora outcomes

### Achievements

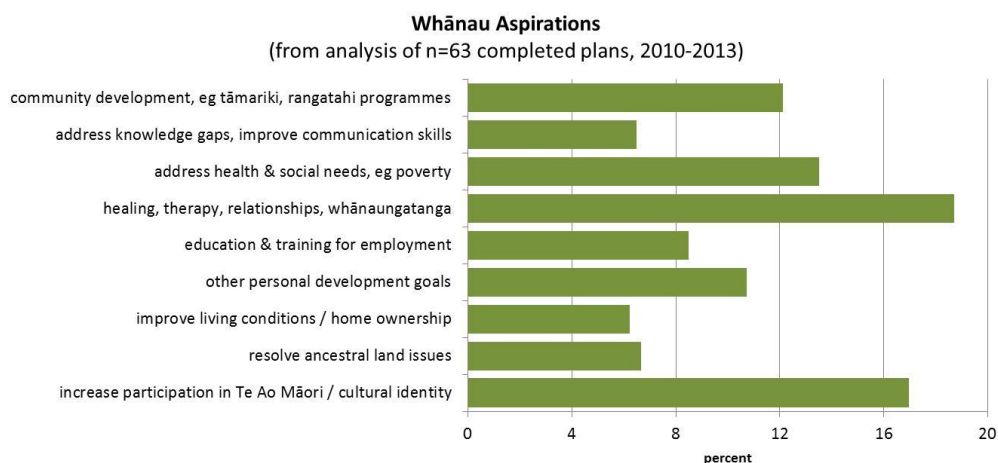
- the WRLG quickly established internal systems for:
  - reporting on WIIE allocations for whānau plans
  - monitoring progress towards the achievement of Te Ara Tipu o te Whānau, 2010-2013 strategic goals
- the GG's template for reporting monthly activities enabled monitoring of:
  - current projects and future work programmes
  - WIIE achievements and allocations
  - relationships with Service Providers, Collectives, other agencies, communities and whānau
  - progress towards the implementation of strategic goals
  - emergent themes and issues within the region
- WRLG knowledge about Waikato WIIE investments was supplemented by:
  - monthly reports from the TPK Smartfund data collection system comprising 13 variables including a brief project description, expected short and long term outcomes, success indicators, project status and the amounts disbursed per contract and in total
  - an internal template for reporting on the number of whānau plans funded, whether the funding was for planning or implementation, the region of origin and the amounts disbursed against budget allocations for the financial year

- an MSD secondment to analyse **38** whānau plans against **6** whānau development categories - education, health, employment, housing, family violence and participation in Te Ao Māori - the findings of this analysis informed development of a Whānau Ora brochure and the MSD's Enabling Employment & Training Plan for Waikato
- independent analysis of **63** completed whānau plans, with a focus on plans that were contracted with whānau directly
- internal analysis of total allocations for 2010-2013 by region, contract holder and the type of plan
- participation in the GG's national survey of WIE outcomes for whānau and service providers
- preliminary comparison of whānau aspirations identified in WIE plans funded by Waikato (n=63) and Te Moana a Toi RLGs (n=45)



- the WRLG's investment in analysis of **63** completed whānau plans identified various indicators which could have been used as a platform for engagement in monitoring, reporting and quality assurance activities, for example:
  - the average number of whānau members participating in planning activities (n=4) was considerably less than applicants had anticipated in their funding applications (n=24)
  - the time taken to complete a whānau plan ranged from 3 months to 18 months but most whānau took 11 months
  - the main method for developing whānau plans was needs assessment (76%), on average Kaitoko/Navigators/Planners spent 5 hours discussing the plan with whānau and met with them on 2 occasions
  - 19% of whānau led their own decision-making process, in general this involved 18 hours of face-to-face hui/wānanga, appointment of a working group/writer to draft the plan and ratification or endorsement by the wider group of whānau members

- most plans focused on the wellbeing of a nuclear whānau (73%) but some addressed the needs of extended whānau and specific target groups, notably taitamariki (11%), non-achieving secondary school students (8%) and shareholders in ancestral land (5%)
- the majority of whānau plans (70%) were presented as a needs assessment template but other methods included a 1-2 page synopsis of discussion themes (17%), power point presentations (14%), descriptive reports (11%) and minutes (6%) - roughly a third (31%) of the plans were not able to be implemented in their current form
- 4 whānau (6%) submitted 5-10 year action plans with clear milestones and timelines; 20 plans (32%) identified measureable actions and goals that could be implemented without additional work and 8% of the plans scoped possible sources of funding for the implementation phase
- The WRLG's analysis of **63** whānau plans also identified themes for development of Whānau Ora programmes and initiatives, measuring the effectiveness of current service delivery, collaboration across government agencies and monitoring changes in whānau aspirations over time



- over 1,000 whānau aspirations were identified in the plans (n = 1155) but these could be grouped into nine main themes
- addressing health and social needs (13%) as well as education, training and employment schemes (14%) was important for whānau but priority was placed on strengthening cultural identity (17%) and opportunities for healing, therapy and whānaungatanga (19%)
- addressing ancestral land issues (7%), improving living conditions/owning homes (6%) and community development (12%) was also important, particularly programmes for tamariki/taitamariki
- many of the aspirations for personal development, addressing needs, knowledge gaps and training suggest inadequacies in current models of service delivery that could be addressed through targeted workforce development schemes

- other aspirations highlighted the need to broker innovative solutions across government agencies, for example, collaboration between the Māori Land Court, MSD, Social Housing Unit and local government authorities could help to resolve ancestral land issues, improve living conditions and create employment opportunities
- to upskill capacity for sector engagement in the measurement of Whānau Ora outcomes, the WRLG hosted a series of RBA training workshops for service providers, Collectives, TPK staff and WRLG members
- to build on the knowledge gained from these RBA workshops, the WRLG also produced an internal discussion document that canvassed possible indicators for a framework to measure Whānau Ora outcomes within and across the Tainui Waka (Appendix 5)

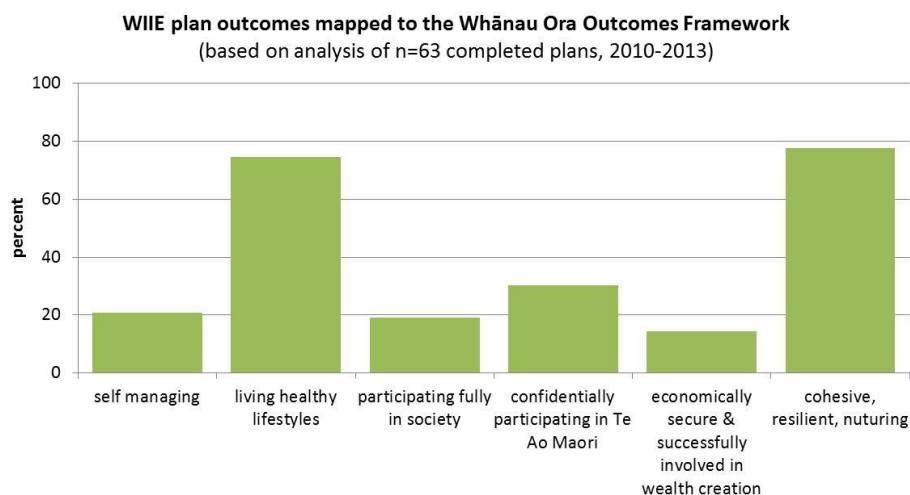
## Challenges

- the WRLG developed a template for reporting monthly progress against the strategic goals identified in Te Ara Tipu o te Whenua, 2010-2013, but this was superseded by a national template for reporting monthly activities
- reporting on the WRLG's progress towards strategic goals mainly occurred through an internal process for annual review
- TPK administration of the WIIE fund was managed on top of existing workloads without additional resourcing or staffing entitlements
- collection of regional WIIE data was burdensome for TPK staff (Kaiwhakarite) and involved duplicating data which had already been entered on the Smartfund system for managing contracts, eg applicant details, amount allocated, the type of plan, start and end dates and contract status
- the Smartfund system did not enable additional information to be collected, such as whānau aspirations, the format of whānau plans or other variables that could be used to measure outcomes
- WIIE data collection and analysis was not budgeted in regional allocations
- Some information was collected nationally, from RLGs and Provider Collectives, and used to compile reports about WIIE expenditure and outcomes
- WIIE plan analysis produced valuable but partial and sporadic insights, a comprehensive approach would have involved collaboration with the Provider Collectives and dedicated investments by the WRLG, partnering government agencies and/or service providers
- the WRLGs analysis of 63 WIIE plans identified four different sets of priorities which could be used to map whānau outcomes, notably: the WRLG's five strategic goals (identified in Te Ara Tipu o te Whānau, 2010-2013); six priorities identified in the Whānau Ora Outcomes Framework; five priorities

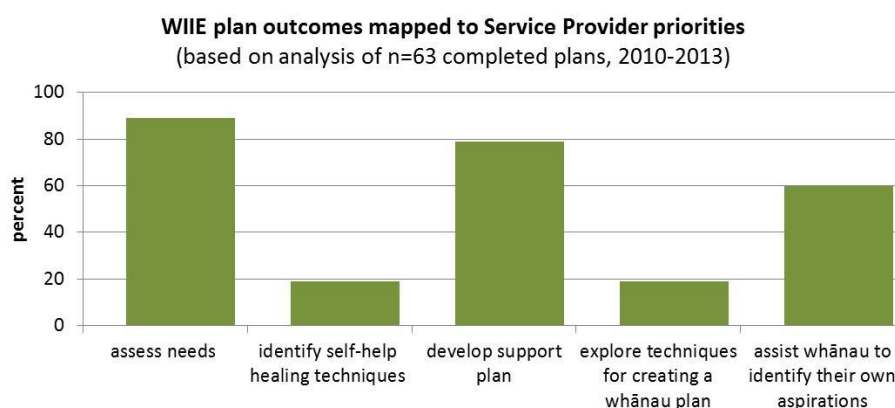
identified by service providers and ten priorities identified by whānau themselves



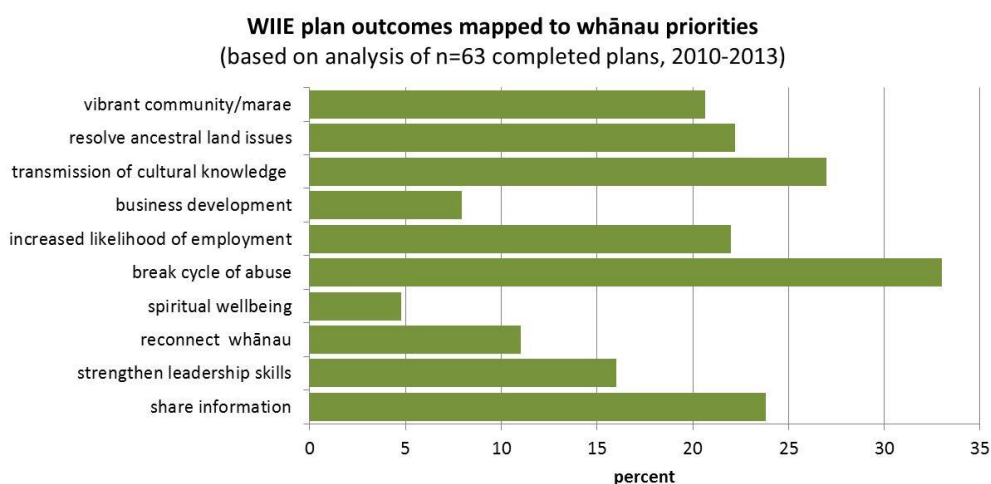
- in terms of the WRLG's strategic goals, every plan represented an investment in Whānau Ora capacity development, through directly funding whānau to write their own plan, or indirectly funding service providers to work with whānau
- from a governance perspective, the majority of plans also represented an investment in quality assurance and monitoring/evaluation (78%) because they provided opportunities for service providers and umbrella groups to engage in these activities, and if necessary, improve their systems and processes
- just over a quarter of the plans (25%) represented an investment in growing effective leadership because whānau were empowered to develop their own plans and take responsibility for the transformation of their own whānau
- comparatively few plans (8%) contained information which suggested the WRLG's investment would create/strengthen opportunities for collaboration



- when whānau plans were mapped to the Whānau Ora Outcomes Framework, the majority of plans aimed to promote healthier life-styles (77%) and cohesive, resilient, nurturing relationships (78%)
- to a lesser extent, some of the plans aimed to strengthen participation in Te Ao Māori (30%), self-management (20%) and full participation in society (19%), less than 15% of the plans aimed to ensure whānau were economically secure and successfully involved in wealth creation



- in general, service providers thought the process of engagement in whānau planning activities would provide opportunities to improve the quality of service delivery but their priorities for whānau were needs assessment (89%), development of support plans (80%) and assisting whānau to identify their own aspirations (60%)
- some providers placed priority on whānau identifying their own self-help healing techniques (19%) whereas others wanted an opportunity to test various methods for creating a whānau plan (19%)



- from objectives identified in WIIE plan funding applications, it was evident whānau mostly wanted plans that would break cycles of abuse (33%), enable the transmission of cultural knowledge (27%), foster information sharing (24%) and resolve ancestral land issues (22%)

- whānau also placed priority on employment (22%), community development (21%), strengthening leadership skills (16%), reconnecting whānau (11%), business development (8%) and spiritual wellbeing (4%)

## Reflections

- differences between priorities identified by the WRLG, GG, service providers and whānau reflect an underlying need for debate about the indicators which could, and should, be used to measure Whānau Ora outcomes in Waikato
- given the need for an Outcomes Framework that is comparable across regions, it would have been prudent to map priorities to the national Whānau Ora Outcomes Framework even though this had not been informed by local discussions
- a system for cross-checking the reliability of mapping activities was needed
- the WRLG's investments in monitoring, reporting and quality assurance activities produced valuable insights that could have informed the Whānau Ora approach to service delivery, future work would benefit from a dedicated budget
- ongoing investments in the development of service provider skillsets for writing a whānau plan, identifying actions that can be implemented, brokering solutions across sectors and working with outcomes will be immensely worthwhile

## Ensuring the Sustainability of Whānau Ora (within Tainui)

Implementing an exit strategy which ensures the sustainability of Whānau Ora, within Tainui, was a key goal in the WRLG's Action Plan for 2013-2014. It was envisaged this would involve:

- ☑ identifying mechanisms and processes that supported implementation of the Whānau Ora approach in Waikato
- ☑ developing a framework of rohe-specific indicators for measuring Whānau Ora outcomes
- ☑ considering the implications of Whānau Ora future focus announcements for Waikato

### Achievements

- the WRLG gained valuable knowledge about the mechanisms and processes which supported engagement with whānau in Waikato, in particular:
  - community-based conduits, with strong networks and relationships, are the key to identifying whānau who would benefit from WIIE funding opportunities
  - such conduits need navigation, planning and facilitation skills which empower whānau to overcome contractual barriers, identify collective aspirations, write a useable action plan, lead their own process and record their journey in a way that identifies their own measures of success
  - every community needs their own locally based conduit, particular strategies are needed to ensure whānau in small towns and outlying communities have the same opportunities
  - Māori land trusts and whānau trusts are effective mechanisms for direct engagement with whānau
  - contractual relationships with whānau tend to produce different outcomes from indirect contracts, through umbrella groups and service providers
  - umbrella groups are a bridging mechanism for engagement with whānau but their role needs to be defined, guidelines and training packages would help to ensure relevant skillsets including capacity for measuring outcomes - the overall goal of an umbrella group should be whānau self-determination
  - a step-by-step approach to engagement with whānau who are overwhelmed by day-to-day experience of poverty, hardship and disadvantage is needed
  - templates for the assessment of health and social needs can help to identify disparities, which were often used as the basis for whānau



plans, but the Whānau Ora approach is more interested in solution focussed service delivery

- service providers need to gather evidence which shows how the implementation of a needs-based whānau plan can address health and social needs, resolves inequalities and facilitates the transformation of whānau
  - Navigators and Whānau Planners need high level skills, their role involves mentoring, facilitation, relationship management, planning, problem solving, working across agencies and organisations, finding innovative solutions, monitoring, reporting and continual scoping of the opportunities for whānau advancement and transformation
  - relationships with whānau/clients are often long-term and multi-faceted and should be funded across multiple agencies
  - the overall goal of engagement with whānau is to build capacity for leadership, self-determination and transformation
  - the WON initiative was effective as a mechanism for identifying whānau who would benefit from the home insulation project but its potential, as a catalyst for innovation and advancement, through integrated contracts and collaboration, was unrealised
  - a bottom-up, problem-solving process - in which WON stakeholders discuss collaborative pathways for resolving issues that are actually identified in whānau plans - may have been more constructive
  - the WON initiative was of value, stakeholders were willing to discuss integrated and collaborative strategies but the Collectives were at different stages of development, the process lacked support systems, resourcing and an appropriate framework for decision-making
- the WRLG has drafted a method for developing an indicators framework to measure, monitor and report on Whānau Ora outcomes, within and across the Tainui waka (see Appendix 5)
  - as a mechanism for ensuring sustainability, it was felt discussions about the framework for measuring Whānau Ora outcomes would:
    - create opportunities for collaboration, leadership, workforce development and alignment of activities within the rohe and nationally
    - build on the knowledge service providers, Collectives and government agencies had gained about RBA macro-modelling techniques
    - generate baseline data for long-term monitoring and evaluation
    - supplement the action research themes and Programmes of Action that Collectives were working on

- in response to announcements on the future focus of Whānau Ora, the WRLG has identified three main strengths, notably, the:
  - ongoing focus on measuring Whānau Ora outcomes, and
  - opportunities for whānau to still be contracted directly
- however, these strengths are undermined by a raft of concerns, some of which may be due to the rushed introduction of such significant reforms and lack of information about how the new structure will build on gains over the last 3 years
- it seems the intrinsically Māori concept of Whānau Ora has been assimilated and misconstrued to meet the needs of non-Māori, for example:
  - one of the 3 NGO commissioning agencies has been dedicated to the needs of Pacific aiga but Māori have been left without the benefit of a specific commissioning agency - the services and opportunities provided by the other 2 NGO entities will be available to all New Zealand families
  - the kaupapa Māori approach to planning and service delivery no longer has priority
  - there is no mention of a commitment to the Te Tiriti o Waitangi or other relevant documents such as the United Nations Declaration on the Rights of Indigenous People
- the introduction of an NGO commissioning model signals a shift towards privatisation of the social services sector, this will not offer the same level of accountability to whānau
- the NGO commissioning entities will add another level of costly bureaucracy that will absorb funding which could have been allocated to whānau directly
- the RLG system ensured whānau had a voice in Whānau Ora planning and decision-making, this voice is missing in the new structure, whānau are not represented by the Iwi Chairs Group and/or NGO entities
- the regional focus has also been lost within the new structure, this was an important driver of capacity building for collaboration and integrated service delivery
- the new structure has moved away from the underlying principle of collaboration and re-introduced a competitive model - how will the new model for commissioning local-level programmes ensure continuity and consistency within the regions?
- the process for appointing representatives to the Whānau Ora Partnership Group has not been transparent, equitable or accountable to whānau
- the new model has the Iwi Chairs Group (ICG) in a decision-making partnership with the Crown, but, for many whānau, the ICG is a symbol of disenfranchisement and subjugation, ICG members are mandated by an often

flawed process of election that was forced upon Māori for the purposes of treaty settlements, they are disconnected from the whānau they are meant to represent

- it is widely known the National Hauora Coalition and Waipereira Trust have applied to become Commissioning Agencies – how will the conflict of interest be managed if these Providers of Whānau Ora services also become the funder of Whānau Ora services?

## Challenges

- the WRLG's involvement in the Whānau Ora approach, over the last 3 years, has identified a number of underlying challenges, particularly:
  - the need to clarify and define the roles and responsibilities of Whānau Navigators, eg - Is there a generic skillset? Is there consistency across service providers? Is there a need for workforce development? What support systems are needed? How is this role different from a Whānau Planner/Kaitoko Whānau?
  - the need for working definitions of concepts like “vulnerable” and “hard to reach” whānau, eg – what are the indicators? how is this currently defined? who does not meet the criteria for funding and why?
  - the need to clarify the purpose of a whānau plan? Is the focus on needs assessment, integrated services or innovation? what models/templates are being used? Is health and social needs assessment effective? How do we know if this makes a difference?
  - the need for ethical guidelines which inform the protocols for access, use and storage of whānau information - how is whānau anonymity/confidentiality protected?, where is the data stored? how long is the information retained?
  - the need to invest in a system and process for gathering information about success stories
  - the need for ongoing investment in monitoring, reporting and development of an evidence base

## Reflections

- TPK is a policy agency that had to quickly develop systems for management and administration of the WIIE fund, including communications, assessments, contracting, monitoring, reporting, professional development and quality assurance – this work is still in progress but the capacity has now been established

- it is a shame the future focus architects have not built on the knowledge and expertise RLG members have gained over the last 3 years, RLG members are connected with whānau, actively involved in their communities and would have brought valuable knowledge to the decision-making table
- the new Whānau Ora model has curtailed the WRLG's vision and plan for development of a framework to measure Whānau Ora outcomes, within and across, the Tainui rohe – a regional focus is potentially transformational, this work should continue but will no longer have a driver
- Minister Sharples has recently announced three new directions for Te Puni Kōkiri (Working Party on the Future Focus of Te Puni Kōkiri, 2013), ie:
  - **Ārahitanga** - strategic leadership and guidance to Ministers and the state sector on the Crown's on-going and evolving partnerships and relationships with iwi, hapū and whānau Māori
  - **Whakamaherehere** - advice to Ministers and agencies on achieving better results for whānau Māori
  - **Auahatanga** - the development and implementation of innovative trials and investments that promote better results for whānau Māori
- it seems these core functions have been designed to build on, and, strengthen the capacities that TPK staff, service providers and whānau have gained over the last 3 years of engagement in the Whānau Ora vision of advancement and transformation

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## **Appendix 1: Terms of Reference**

### **Term of Establishment**

Regional Leadership Groups will be established from 16 July 2010 to 30 June 2013.

### **Role and Responsibilities**

Regional Leadership Groups will be responsible for:

- leading strategic change for Whānau Ora within their region;
- providing positive representation of Whānau Ora at the local and regional level;
- fostering excellent communications and relationships within regions;
- ensuring the work of the Group is coordinated with other local and regional initiatives and services;
- providing high quality advice and recommendations to the Governance Group on the selection of Whānau Ora service providers; the development and implementation of Programmes of Action; regional whānau-centred service delivery and initiatives; priority areas and other issues or areas of advice as determined by the Governance Group; and
- monitoring and reporting on results, outcomes, best practice examples/models and implementation issues in their region.

Each Regional Leadership Group will determine how it will best organise itself to carry out its role and responsibilities. For Regional Leadership Groups in large geographical regions, this may include reviewing how input will be drawn from smaller localities to ensure that regional diversity, whānau needs and local realities. The performance of Regional Leadership Groups in carrying out their role will be evaluated annually by the Governance Group and reported to the Minister Responsible for Whānau Ora. Any issues of performance or operation will be managed by the Governance Group.

### **Regional Boundaries**

Regional Leadership Groups will be established across 10 regions based on the current Te Puni Kōkiri regional boundaries, as set out in Appendix 1.

### **Membership**

Regional Leadership Groups will be made up of one representative each from Te Puni Kōkiri, Ministry of Social Development and District Health Boards, along with community representatives appointed by the Minister Responsible for Whānau Ora on the advice of the Governance Group.

### **Membership and Representation**

Regional Leadership Groups will have a maximum membership of 10 people. This will include the three government officials and between three to seven community representatives.

### ***Skills and Experience***

Any member appointed to a Regional Leadership Group will be well known in the community and have a sufficient mix of the following skills and experience:

- experience/expertise in the health, social, economic and cultural sectors;
- experience in working with collectives and in whānau development at a community level;
- knowledge of issues facing whānau and service provision to whānau within the region;
- an understanding of local service provision issues and accountability requirements;
- experience in advocating for and leading change within communities;
- proven relationship management skills and a wide range of whānau/community networks;
- knowledge of other initiatives occurring within the region that may impact on, or have synergies with Whānau Ora service provision.

Members of Regional Leadership Groups will have a primary interest in promoting the well-being of whānau within their region.

### ***Chair and Deputy Chair***

The Chair and Deputy of the Regional Leadership Group will be recommended by the Governance Group and be appointed by the Minister. Regional Leadership Groups will be led and managed by a Chair whose role will be to:

- ensure the effective functioning and integrity of the Group;
- approve meeting agendas and minutes;
- chair all meetings and lead discussions and decision making;
- ensure the Group is well informed to carry out its role;
- liaise with Te Puni Kōkiri national office and Governance Group Chair as required;
- act as an official spokesperson for the Regional Leadership Group; and
- ensure effective relationships and responsive communications are maintained with the Governance Group, providers, iwi, government agencies and key regional stakeholders.

The Deputy Chair will be responsible for leading and chairing the Regional Leadership Group in the absence of the Chair.

### ***Replacement of members***

The Regional Leadership Group will agree on an appropriate process for replacing members in consultation with the Governance Group.

## **Code of Conduct**

### ***Conflict of Interest Arrangements***

Individuals nominated as Regional Leadership Group members will be required to complete a full disclosure of affiliations and conflict of interest, and consent to police check at the time of nomination. Members will be required to immediately disclose to the Group any and all impending or potential conflicts. That member shall absent themselves, without comment from any discussion deliberation and decisions involving other organisations or individuals in which they have a conflict of interest. Members must not use their positions on the Regional Leadership Group to obtain employment or special considerations, or to conduct private business or personal services.

### ***Confidentiality***

Members will respect the confidentiality appropriate to issues of a sensitive nature. Information received or discussed at meetings shall remain confidential, unless otherwise agree by the Regional Leadership Group or Chair. It cannot be used by members for personal gain or the gain of a family member of associate.

## **Accountability and Reporting**

Regional Leadership Groups will be accountable to the Whānau Ora Governance Group. Monthly reports will be provided to the Governance Group in the first year of Whānau Ora implementation and on a quarterly basis in subsequent years. Additional reports may be provided where required, or at the request of the Governance Group.

## **Secretariat**

The regional Te Puni Kōkiri office will provide secretariat services to the Regional Leadership Group. This role will include:

- scheduling and coordinating Regional Leadership Group meetings;
- minuting discussions and key decisions;
- coordinating the development and provision of monthly reports to the Whānau Ora Governance Group on behalf of the Regional Leadership Group;
  - liaising with Te Puni Kōkiri national office to:
  - coordinate the provision of reports and papers between the Regional Leadership Group and Governance Groups;
- coordinate media releases, media statements and public communications on behalf of the Regional Leadership Group;
- coordinate actions with regional officials and DHB's in response to Governance Group decisions;
- ensuring papers are provided to Regional Leadership Group members in a timely fashion; and
  - administering payment of community member's fees and arranging reimbursement of reasonable expenses.



## **Meetings**

The Regional Leadership Groups will meet monthly from 16 July 2010 to 30 June 2011 and quarterly from 1 July 2011 to 30 June 2013. Additional meetings may be organised by the Chair if required. To enable an appropriate review of papers and materials, members will be sent information in advance of meetings in either paper form or electronically. Proceedings of all meetings will be minuted, signed by the Chair and approved by the Regional Leadership Group at the subsequent meeting. The Chair will establish the agenda for each meeting.

## **Communications and Relationship Management**

### ***Engaging with the Whānau Ora Governance Group***

Regional Leadership Groups will provide monthly written reports to the Governance Group. The Chair, or representatives of the Regional Leadership Group may be required to meet with the Governance Group from time to time. These meetings will be coordinated by Te Puni Kōkiri national office, in conjunction with the Governance Group Chair and Regional Leadership Group Chair.

### ***Engaging with regional providers, local authorities, iwi and community organisations***

Regional Leadership Groups will maintain effective relationships with key regional stakeholders to support the successful implementation of Whānau Ora within their region.

### ***Communicating with media***

The Chair of the Whānau Ora Governance Group shall be the media spokesperson on all national and political matters pertaining to Whānau Ora. The Chair of the Regional Leadership Group shall be the media spokesperson on local matters for the group as required. All communications between the Regional Leadership Group and media will be coordinated through Te Puni Kōkiri.

## Appendix 2: Vision Statement

### Whānau Ora in the Waikato Region

#### Dream

Transformational change where whānau discover new worlds, where every mokopuna is born wanted, safe and free

#### Beliefs

- Building on whānau strengths and values
- The most important thing is good outcomes for whānau
- Māori deserve nothing but the best
- Building Māori role models and champions
- Whānau Ora is Māori led
- Collective efforts will produce better results
- Real time solutions – safety, education, employment are important to Māori

#### Greatest Imaginable Challenge

For communities to see a measurable positive impact in health, social and cultural indicators for whānau in our rohe.

#### Spirit and character

Rebels and champions of change

#### Connectors

- Collective – united
- Transparent
- Optimism
- Visibility and accountability
- Integrity
- Uniqueness
- Listeners

#### Focus

It makes a positive difference to whānau

## Appendix 3: Strategic Goals

1. Growing Effective Leadership	2. Ongoing Quality Assurance
<p><b><u>Internal Leadership Capacity</u></b></p> <ul style="list-style-type: none"> <li>• TOR for RLG established</li> <li>• 2 Chairs appointed for Waikato RLG</li> <li>• Regular meetings established for RLG</li> <li>• RLG foster an open and transparent approach to Whānau Ora</li> <li>• Foster Leadership capacity within RLG</li> <li>• Ensure issues of <u>lwi</u> representation or connection to RLG are addressed</li> </ul> <p><b><u>Leadership of Whānau Ora within Waikato region</u></b></p> <ul style="list-style-type: none"> <li>• RLG to provide governance over site to Whānau Ora Framework and <u>intersectoral workstreams</u> (contracting, quality assurance, outcome indicators, whānau ora care plan)</li> <li>• RLG monitor and report against the implementation of the Whānau Ora strategic plan</li> <li>• RLG to guide or support as appropriate development opportunities with potential Whānau Ora entities not successful in phase 1 (i.e. Hauraki, Raukawa, Maniapoto, &amp; Maata Waka)</li> <li>• <u>Intersectoral Leadership</u> programme established to action Whānau Ora</li> </ul>	<p><b><u>Internal Quality Assurance for RLG</u></b></p> <ul style="list-style-type: none"> <li>• RLG internal infrastructure in place (TOR, 2 Chairs in place, set meetings, minutes taken etc)</li> <li>• Establish minimum standards for Whānau Ora assessment tools and intervention plans within Waikato region</li> </ul> <p><b><u>Quality Assurance for Whānau ora in Waikato region</u></b></p> <ul style="list-style-type: none"> <li>• Establish a minimum set out Whānau Ora indicators and outcomes for Waikato region</li> <li>• Training/ presentation rounds provided to RLG from different partnerships/ government agencies with various Whānau Ora funds</li> <li>• Assessment of Whānau Ora proposals adheres to due diligence, manages conflict of interest and is confidential</li> <li>• RLG actively support the Programme of Action with approved providers/ entities (Waikato <u>Tainui</u>, National Urban Maori Authority)</li> </ul>
3. Collaboration	4. Whānau Ora Capacity Development
<p><b><u>Community Collaboration</u></b></p> <ul style="list-style-type: none"> <li>• RGL develop effective relationships with <u>lwi</u> leadership (<u>Tainui Waka Alliance</u>) within Waikato region</li> <li>• RGL develop and maintain effective relationships with Minister of Whānau Ora and the National Governance Group</li> </ul> <p><b><u>Collaboration with Head office and other RLG's</u></b></p> <ul style="list-style-type: none"> <li>• Waikato RLG to share information key learning's with other RLG across Aotearoa</li> <li>• RGL to develop and implement communication plan to keep key stakeholder groups informed of developments</li> <li>• Action Research fund prioritised to use research to evaluate Whānau Ora models</li> <li>• Director of Whānau Ora TPK National office</li> </ul> <p><b><u>Intersectoral Collaboration</u></b></p> <ul style="list-style-type: none"> <li>• Representation from TPK, Ministry of Social Development and Waikato DHB secured on RLG</li> <li>• Establish Whānau Ora as a key initiative within MSD and Waikato DHB District Annual Planning (DAP)</li> <li>• Establish a Whānau Ora Development and Implementation Framework across government sectors</li> <li>• Develop <u>intersectoral workstreams</u> that report to RLG in the areas of contracting, outcome indicators, Whānau Ora care plan to implement Whānau Ora framework</li> <li>• Develop a link and relationship between Whānau Ora and the private sector</li> </ul>	<ul style="list-style-type: none"> <li>• RLG will guide and support as appropriate development opportunities in regard to Whānau Ora with Hauraki, Raukawa, Maniapoto, Waikato &amp; in Hamilton city</li> <li>• RLG actively support the Programme of Action with approved providers/ entities</li> <li>• Establish a Whānau Ora Development and Implementation Framework across government sectors in conjunction with Maori community/ providers</li> <li>• Identify and recruit Whānau Ora champions</li> <li>• Develop <u>intersectoral workstreams</u> that report to RLG in the areas of contracting, outcome indicators, Whānau Ora care plan to implement Whānau Ora framework</li> <li>• RLG will be flexible and agile enough to integrate or take key learning's and opportunities relating to Maori/ indigenous developments that would support the attainment of whānau ora within our region</li> <li>• Explore and support the alignment of activities between Whānau Ora entities and their respective Whānau Ora sites.</li> </ul>
5. Monitoring and Evaluation	
<ul style="list-style-type: none"> <li>• RLG monitor and report against the implementation of the Whānau Ora strategic plan</li> <li>• Whānau Ora indicators and outcomes framework established within Waikato</li> <li>• Whānau Ora assessment tools and intervention plans are strength based and meet minimum set quality assurance standards</li> <li>• All Whānau Ora models demonstrate a commitment to ongoing quality assurance</li> <li>• Higher Trust contracts established and performance monitored</li> <li>• Research Action Fund allocated and research utilised to evaluate success of Whānau Ora</li> </ul>	

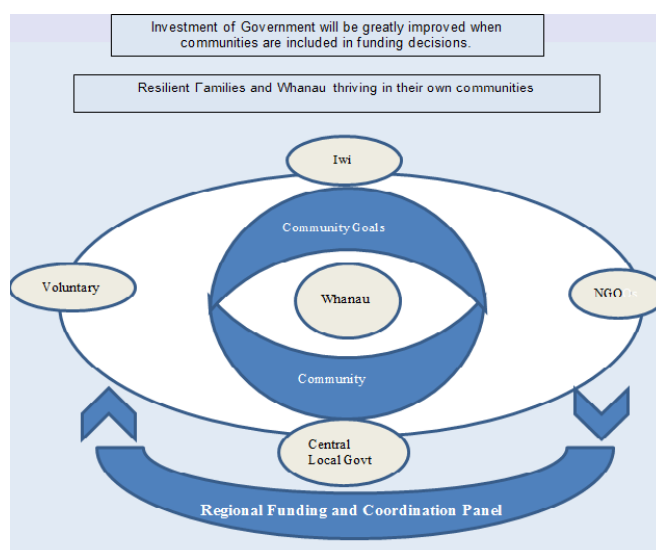
## Appendix 4: A similar cross-agency initiative – the Community Centric Regional Funding Model

The Minister of Social Development tasked the Community Response forums with a wide brief in terms of the objectives they were to achieve which included:

- Provide families with easily accessible lined up services;
- Provide government with higher quality services;
- Allow communities to participate in decisions about funding for social services;
- Support communities and providers to work more effectively and build their capacity to provide integrated joined up services

In September 2011, the CRM forums recommended a “funding model change up” for FACS. They recognised this was ambitious, required transformational change and would need on-going development. The community centric approach has 5 key elements:

- **community accountability** - provider’s and FACS would not only be ‘upwardly’ accountable it would be accountable to the communities in which their services were delivered.
- community engagement and involvement in the decision making process – involving communities in the decision making process
- **the need for a clear rationale to funding decisions** – the reasons for FACS funding decisions were not clear.
- **opportunities for joined up integrated services** – remove barriers to collaborative approaches, and develop a new culture between service providers in communities.
- **a regional funding panel** through which the community centric approach could be implemented.



## **Goals and Principles of the model**

### **(i) Resilient whanau and communities**

- Whanau/families are strong and resilient (are able to sustain themselves through challenges and change with the minimal support from communities, iwi authorities and government)
- Communities are strong, cohesive, and resilient (are able to sustain themselves through challenges and change with minimal support from iwi authorities and government)

### **(i) Optimal, efficient and effective support by government**

- Optimal: the support provided by government is effective, and not over-provided in a way that promotes dependence or undermining of self-reliance of whanau and communities
- Efficient: costs no more than is needed to deliver an effective service or support
- Effective: delivers the intended outcome
- Minimize negative unintended consequences
- Optimise Government spend

### **(ii) Inter-sectorial approach**

- To move resources as required – flexibility
- To gain different perspectives to problem solving and realising opportunities
- To marshal resources in a flexible manner to meet needs to create positive outcomes
- Improve cross government co-ordination in service delivery to communities – remove silos

### **(iii) Government policy is a determinant**

- Tax-payers are funding programmes
- Governments have policy objectives
- Link community outcomes to Government outcomes

### **(iv) Community-responsive**

- Communities are closest to their issues and emerging changes
- Communities understand what works and what doesn't work
- Communities have good ideas on what needs to change and how to change

- Strategies and interventions designed
- Support what is already working – e.g. Social Sector Trials
- Are innovative
- Community Accountability – engagement

**(v) Outcomes and results based**

- We must get results and outcomes not just process and outputs
- We measure success through outcomes achieved
- Rolling review of progress across region

**(vi) Regional authority scope reach**

- Central government is structured on a regional level
- Local government can be grouped on a regional level; regional authorities exist at regional level.
- Communities can be grouped at a regional level
- Link to community leadership groups already in place – e.g. CoBoP, Whanau Ora Governance Groups
- Sharing of regional good practice

**(vii) Forward looking – proactive**

- Analyse regional needs to identify issues before they escalate into major problems for communities
- Enabling, promotion and information to communities
- 

**(viii) Aspirational**

- Support community/whanau aspirations – e.g. whanau ora

## Appendix 5: The WRLG's method for developing a framework to measure, monitor and report on Whānau Ora outcomes, within and across, the TAINUI waka

### Identifying Indicators

The framework for measuring Whānau Ora outcomes comprises six main **goals** (called Whānau Outcome Goals) which provide the overarching platform for identifying possible indicators (defined by the Taskforce and Governance Group). The indicators that we select should capture information which demonstrates that whānau are:

- Self-managing (Mana Motuhake)
- Living healthy lifestyles (Mana Ora)
- Participating fully in society (Mana Whenua)
- Confidentially participating in Te Ao Māori (Mana Tangata ki te Ao)
- Economically secure and involved in wealth creation (Mana Rawa)
- Cohesive, resilient and nurturing (Mana Kumanu)

As a starting point for discussion, the following tables list some of the many indicators that could be used to measure outcomes against the six domains identified in the Taskforce framework. This has been informed by literature review and discussions with various agencies such as Statistics NZ (Māori Social Survey), NZ Police (Alternative Resolution for at-risk Māori) and Poverty Action Waikato. Stakeholders will need to decide:

- whether this information should be collected at the whānau, Provider or population level, and
- how the data will be presented, eg – as raw data (actual numbers), percentages or rates, eg per 1,000 or 10,000 of the population.

Whānau Outcome Goals can be measured in three main ways. Firstly, the indicators could capture outcomes at the **whānau level**. This information is difficult to obtain as it requires a mechanism for gathering data from whānau directly, such as personal interviews, surveys or focus groups. Alternatively, the indicators could capture outcomes at the **Provider or Collective level**. This would involve reporting on data that is already collected by Providers, such as, the number of clients or the number of clients using a Navigator service. The challenge would be identifying datasets that are consistent and compatible, or collected in the same way by all of the Providers within each Collective as well as across the rohe. Lastly, the indicators could capture outcomes at the **population level** which, in this case, would be the number of people/whānau living in the Tainui rohe. This information can be obtained from national datasets held by government departments and local authorities, such as Stats NZ, Justice, MSD, MoH, MoE, Councils and DHBs and could, for example, include things like home ownership rates, levels of numeracy/literacy, youth crime rates and school enrolments. It may be difficult to show how population-based indicators are associated with the Government's investment in Whānau Ora, eg – a decline in youth crime rates may be due to other changes within the Justice sector, such as partnerships with Providers who are not part of the

Collectives. Similarly, more houses being insulated may be due to changes in EECA eligibility criteria rather than Navigator services. My recommendation would be to place priority on indicators that are measured at the Provider/Collective level.

Decisions about how the data is presented will be limited by the type, and quality, of data that is available. For example, population-based rates are the best indicators but reliable denominators are needed for the calculation, this means the variable must be routinely collected within the rohe or total population. Percentages would be the second choice but the denominators will still need to be appropriate, eg:

- the total number of clients serviced by all of the Providers in a particular Collective added to the total clients for all Collectives would be the ideal denominator for calculating percentages but this may not be possible because some of the Providers, within some of the Collectives may not collect the data or provide the service
- for example, the percentage of children coming through Te Ope Koiora's model of whānau-based foster care could be a good indicator of Mana Motuhake (self-determination) but we would need to explain how the percentage was calculated, ie - the denominator would have to come from Te Ope Koiora's database rather than all of the Collectives in Tainui as they are likely to be the only Provider with that service.

When percentages are used to describe data, it is good practice to use other statistical techniques, like confidence intervals to improve the reliability or robustness of findings. Given this is a pilot of possible indicators, and may involve relatively small sample sizes, the use of more complex statistical techniques may not be possible. At best, the framework that is produced will test the feasibility of particular indicators and provide baseline data for future comparison. These issues are raised, so everyone is clear about the types of discussions that will be involved in developing a Whānau Ora Indicators Framework for the Tainui Waka and the likely content of the report.

The initial workplan should aim to:

- identify a few (2 or 3) indicators for each of the six whānau outcome goals that could be measured at the Provider/Collective level
- identify some population level indicators that may be appropriate to use
- gather baseline data
- use simple descriptive techniques to present the data

The methods for drafting the framework will primarily involve:

- liaison with WRLG members and TPK staff to approve the workplan for piloting and reporting on the Outcomes Framework
- meeting with Whānau Planners, service providers, host institutions and other relevant stakeholders to discuss the objectives, methods and possible indicators



- concurrent discussions with relevant government agencies/local authorities to scope population-based indicators which may be of use
- gathering data from other relevant sources, eg - a whānau survey, the GG's national survey of whānau and service providers
- consolidating the information obtained to identify a feasible set of indicators
- compiling the draft framework, circulating for feedback and implementing a pilot test

## Possible Indicators for consideration (as a starting point for discussion)

	Providers / Collectives	Government agencies such as MSD, MoH, TPK & Justice	national dataset	local authority such as DHBs and Councils
<b>Self Managing (Mana Motuhake)</b>				
whānau are self-determining				
number of Whānau/Ahu Whenua Trusts		x		
number of whānau who have Action Plans	x	x		
% of Action Plans that have proceeded to implementation	x	x		
number of clients using Navigator services	x			
number of clients not needing Navigator services	x			
number of crises that happen outside business hours (when Navigators not available)	x			
number/types of Kaupapa Māori services in the community/rohe	x	x	x	x
number of children in Whānau-based models of foster care (Te Ope Koiora Model)	x	x		
number of marae/Māori organisations authorised to run community service		x		
number of marae/iwi-based systems for restorative justice/alternative youth action		x		
<b>Living Healthy Lifestyles (Mana Ora)</b>				
whānau are leading healthy life styles				
number of new clients enrolled in Auahi Kore services	x		x	
number of whānau benefitting from home insulation initiative	x	x		
number of youths/clients participation in sports	x			
number of people with diet & nutrition deficiencies		x	x	
number of new clients with AOD issues	x	x	x	
number of clients registered with mental health services	x		x	
number of clients with diagnosed mental health disorder	x			
number of people on psychiatric medications	x	x		
number of hospital admissions for respiratory disorders		x		
obesity rates	x	x		
% living in sub-standard, overcrowded living conditions	x		x	
<b>Participating fully in Society (Mana Whenua)</b>				
whānau have an effective voice, whānau are participating in decision-making, whānau are influencing decisions, whānau are participating in Te Ao Hurihuri				
% enrolled to vote in national elections		x		
% exercising their right to vote (government, DHBs, Council etc)			x	x
% registered and voting with tribal authority	x			
representation on decision-making authorities, eg BOTs, Councils, DHBs				x
number of iwi-liaison positions on Council				x
number of iwi partnerships with local authorities, DHBs, Justice etc		x		x
Number of clients involved in voluntary groups	x			
% enroled in education pathways	x			
number of clients with numeracy & liiteracy issues	x			
% youths in alternative education	x			
school truancy rates			x	
rates of crime/prison/recidivism		x	x	
use of restorative justice	x	x		
number of rangatahi coming through youth diversion/alternative resolution services	x	x		

	collectives	Government agency including DHB	national dataset	local authority
<b>Confidentially participating in Te Ao Māori (Mana Tangata ki te Ao)</b>				
whānau are culturally grounded, connected to marae/hapū/iwi, participating in Te Ao Māori				
% clients learning/speaking te reo Māori	x		x	
number of kaumatua with te reo	x		x	
% enrolled in Puna Reo, Kura Kaupapa, Whare Kura, Whare Wānanga	x		x	
number of Māori land blocks with decision-making structure		x		
other types of participation in Te Ao Māori, eg kapa haka, waka ama	x			
knowledge of iwi affiliation	x			
participation in marae, tribal affairs	x			
<b>Economically Secure &amp; successfully involved in wealth creation (Mana Rawa)</b>				
whānau are financially secure, living above the poverty line				
number of whānau who own their own homes	x	x	x	
number of whānau applying for mortgages to own their own homes	x		x	
number of Māori businesses		x	x	
number of youths engaged in trades training/higher qualification pathways	x		x	
Proportion of clients on unemployment/emergency/other benefits	x			
proportion of clients employed	x		x	
proportion of school leavers with qualifications below NCEA Level 1	x	x	x	
% clients in main income/deprivation groups	x		x	
changes in median weekly income	x		x	
whānau use of food banks	x			
Gini co-efficients for whānau living in the Waikato region			x	
<b>Cohesive, Resilient, Nurturing (Mana Kumanu)</b>				
whānau value and care for each other				
number of FGCs/MLC mediation/disputes resolution	x	x		
proportion of rangatahi benefitting from Police alternative action	x	x		
whānau violence rates	x		x	
number of CYF child abuse investigations	x	x	x	
% confirmed child abuse		x		
child removal rates	x	x	x	
perceptions of whānau wellbeing	x	x	x	
perceptions of how well whānau get along with each other	x	x	x	
use of refuge services	x			
use of emergency housing/night shelters	x	x		
rates of non-accidental injuries/deaths			x	
number of whānau interventions, eg registration with social service worker	x	x	x	