

LITMUS

Success frameworks for Place-Based Initiatives: Design and toolkit

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Nāu te rourou, nāku te rourou, ka ora ai te iwi
With your food basket and my food basket, the people will thrive

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We acknowledge the contribution of our team members Dr Lanuola Asiasiga, Maria Marama, Glenis Hiria Philip-Barbara, and Rachael Lamb-Yorski.

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Report purpose

The purpose of this report is to present the success frameworks for Manaaki Tairāwhiti and the South Auckland Social Wellbeing Board (SASWB). The success frameworks provide insight into the role and value of two Place-Based Initiatives (PBIs) as localised and whānau-centred adaptive approaches to address complex issues.

The report contains the context and design process for the two success frameworks, and case study templates for Manaaki Tairāwhiti and the SASWB. The draft case study templates and the success frameworks were tested and refined through developing prototype case studies. The case study approach adopted trials a pragmatic way of demonstrating the PBIs progress in contributing to social sector system change and sharing learnings to enable broader system improvements.

We detail the intended use of the success frameworks and their review process. The appendices contain information that may be useful for other Place-Based Initiatives (PBIs) and similar approaches, including a theory of change, key literature insights, and tools for assessing collective action and whānau outcomes.

The success frameworks are living documents. They will continue to evolve over time as both Manaaki Tairāwhiti and SASWB adapt to meet the needs of their people and place.

Note: The Manaaki Tairāwhiti Governance Group has not formally agreed to their framework at December 2020. The Manaaki Tairāwhiti framework will continue to evolve based on their feedback.

Background to the success frameworks

In 2016, Cabinet agreed to fund Manaaki Tairāwhiti and SASWB

Many types of Place-Based Initiatives (PBIs) and approaches exist. The purpose of Manaaki Tairāwhiti and SASWB was to improve outcomes for at-risk children and their whānau by shifting collective decision-making and discretion to the local level.

Funding the Place-Based Initiatives (PBIs) responded to the Productivity Commission's report, *More Effective Social Services*. The report found the social service system to be 'bureaucratic, inflexible, wasteful, and unable to learn from experience' (Productivity Commission, 2015). Funding the PBIs was intended to (Cabinet Social Policy Committee, 2016, Cabinet Social Wellbeing Committee 2018a, and 2018b):

- give local social sector leaders (through the local PBIs) flexibility and support to collectively tailor services to what works in their communities
- move decision-making to local social sector leaders
- better integrate services across government, iwi, and other agencies to minimise duplication.

Since 2016, these PBI models have evolved

Since 2016, Manaaki Tairāwhiti and SASWB have adapted to local conditions and the changing articulation of government priorities. In 2019, the Litmus evaluation described their structures and visions as follows:

- Manaaki Tairāwhiti is an iwi-led PBI with members from 13 government agencies and non-government organisations (NGOs). Iwi leadership, through the independent co-chairs of its governance group, has instrumentally progressed the vision of Manaaki Tairāwhiti:

*Mā te mahi tahi e tipu matomato ai ngā whānau o te Tairāwhiti.
United leadership that enables all whānau to flourish in Tairāwhiti.
Whānau flourishing (community vision)*

- SASWB is a government agency-led PBI with 13 government agency/local government members and an independent non-government chair. The vision of SASWB is:

*All children in Māngere (and South Auckland) are healthy, learning, nurtured, and connected to their communities and culture, and building a positive foundation for their future.
I want my children to have an awesome life (whānau vision)*

A national support function, based in the Ministry of Social Development (MSD), supports the PBIs.

Manaaki Tairāwhiti and SASWB are based on a whānau-centred way of working and system change

Both PBIs use a test, learn, and adapt approach to develop cross-agency ways of working to meet the needs of whānau with complex inter-generational needs. Through trialling whānau-centred, cross-agency ways of working, they are identifying system changes to improve outcomes for wider whānau.

The theory of change, in Appendix 1, demonstrates the complexity of this type of PBI working across local, regional, and national tiers. The PBIs are grounded on a shared vision and a collective whānau-centred way of working based on effective cross-agency governance and operational structures. The local and national backbone structure is critical for the ongoing development and sharing of evidence-based insights across the tiers. Central government has a vital role in enabling the PBIs through devolved decision-making, sustained funding, and drawing on learnings for wider system change to benefit whānau.

The 2019 evaluation demonstrated the value of the PBIs

The evaluation found the PBIs, over the last four years (2016-2019), have developed new, cross-sector ways of working to meet the needs of whānau with complex multi-generational needs. Through the test, learn, and adapt process, the PBIs have contributed to positive whānau outcomes. They have also influenced system change at local and regional levels and have sought to influence changes in national-level social sector systems (Litmus, 2019).

The evaluation also identified areas for strengthening the PBIs

Underpinning the success framework are two areas for strengthening the PBIs. Firstly, no agreed success framework exists to demonstrate the ongoing value of the PBIs. In 2019, substantial investigative work found quantifying PBIs' impact on whānau wellbeing outcomes using both traditional and innovative methods was not feasible, at that time. Quantifying outcomes was not possible due to the nature of the PBIs and technical issues affecting the feasibility of impact estimates for whānau.

The second area is improving central government agencies' awareness of the value of the PBIs in enabling cross-sector collaboration to improve social systems that better support whānau with complex inter-generational needs. Currently, no formal mechanisms exist for the PBIs to share their insights and enable system change at a national level.

In 2020, Litmus was commissioned to develop a success framework using qualitative, collective impact approaches. The overarching purpose of the success framework is to demonstrate the value of Manaaki Tairāwhiti and SASWB to their communities, MSD, and other central government agencies, and create shared learning opportunities.

Designing the success frameworks

We summarise below the framework design process to illustrate the collaboration with SASWB and Manaaki Tairāwhiti, MSD and SWA, and the iterative prototyping and refinement of the frameworks. The success frameworks reflect the ongoing evolution of the PBIs.

We commenced the design process in February 2020. We paused the development of the success frameworks during the Covid-19 lockdown period as Manaaki Tairāwhiti and SASWB worked to minimise the effect of the lockdown on whānau.

We began with a hui to determine purpose and use

We held hui with SASWB and Manaaki Tairāwhiti, MSD, and SWA to agree the purpose and use of the success framework. We debated the value of having a common success framework covering both PBIs versus unique frameworks for each. Having a common framework was viewed as a way for the PBIs and central government to evaluate their progress collectively and share learnings. This initial consideration reflected commonalities in their underlying theory of change (e.g., working collectively, being whānau-centred, focusing on system change). However, a common framework would dilute the different origins, in particular, Manaaki Tairāwhiti being iwi-led and differing geographical and population needs.

We agreed to develop two frameworks to reflect the uniqueness of each PBI. Some commonalities are reflected across the PBI success frameworks.

We used the following principles to guide the design

We agreed on principles to guide the development and use of the success frameworks. The success framework will be:

- based on Te Tiriti o Waitangi, and recognise the Crown and iwi partnership
- centred on the uniqueness of each PBI and also the commonalities across the PBIs
- flexible and adaptive to the changing dynamic of the PBIs
- focused on the local, regional, and national system levels
- fostering shared learnings to support decision-making and action
- fit-for-purpose and not place unneeded demand or resource requirements on the PBIs.

We completed a brief review of national and international literature

At the first hui, we agreed the success framework would demonstrate success for the PBIs across three macro-level areas:

- the strength of and adaptation of the collective way of working

- the contribution to social sector systems change at local and regional levels and sharing system learnings at a national level
- positive outcomes or change for whānau involved in PBI system change processes.

We focused the literature review across these three areas and reviewed the international literature on success criteria for PBIs. In summary, we found:

- No off-the-shelf model or one 'right way' exists and the importance of working collaboratively to develop the framework (Clear Horizon et al., 2018)
- Measurement frameworks can be restrictive and resource-intensive (Cabaj and Weaver, 2016)
- The importance of tools to support reflective learning to support PBIs' vision (Cabaj and Weaver, 2016; Lankelly Chase, 2017; Ferris and Hopkins, 2015).

Highlights from the literature are in Appendix 2, and references are in the bibliography.

We engaged with The Southern Initiative

The Southern Initiative is a place-based programme set up by Auckland City Council in 2012. This PBI uses co-design principles to take an integrated approach to social and economic development in South Auckland. We reviewed and took into consideration their approach to assess success.

We developed a prototype success framework

Drawing across the work above, we developed a single prototype success framework and tools to work across both PBIs. We held separate hui and had several meetings with Manaaki Tairāwhiti and SASWB to discuss their feedback on the prototype.

Feedback on the prototype indicated the preference for:

- strengthening the focus on Te Tiriti o Waitangi
- having tailored success frameworks for each PBI to reflect the differing origins, leadership, and approaches to system improvement
- strengthening the links to the PBIs' strategic direction
- simplifying the approach and drawing only on existing evidence and insights
- increasing the focus on the role of central government agencies to enable PBI success and use the PBI learnings to inform wider social sector system change.

We developed two success frameworks and tested them

Based on the feedback, we developed two success frameworks: a generic 'maturity-based' success framework for PBIs for use by SASWB (and similar initiatives), and a tailored framework for Manaaki Tairāwhiti.

We tested and refined the frameworks following a collective hui with the PBIs, MSD, SWA, and the Litmus team. We further refined frameworks through developing a prototype case study for each PBI. We then developed case study templates for use by the PBIs going forward (in Appendix 4 and 5).

We held a closing hui to agree the shared learning approach

We agreed the success frameworks are working drafts, and will evolve over time. MSD and the PBIs will use the case studies to encourage discussion of PBI insights at a central government level and to highlight barriers to system improvement at this level. The shared learning approach (at national and regional levels) is in Future Directions (page 26).

Te Tiriti o Waitangi is the foundation

Te Tiriti o Waitangi (the Treaty of Waitangi; Te Tiriti) is the founding document of Aotearoa New Zealand. Te Tiriti is an agreement between two signatories – the Crown (tangata Tiriti) and Māori (tangata whenua).

Te Tiriti defines the Crown and Māori relationship of the PBIs

Manaaki Tairāwhiti is an iwi-led PBI

Selwyn Parata, Chair of Te Rūnanganui o Ngāti Porou, instigated Manaaki Tairāwhiti. Iwi leadership continues through the independent co-chairs from Te Rūnanganui o Ngāti Porou and Te Rūnanganui o Tūranga-nui-a-Kiwa. Iwi leadership enables a power shift to a locally determined vision and delivery by the community.

SASWB are working on strengthening their inclusion of Māori and iwi

In 2019, the Strategic Māori Advisory Group, consisting of strategic Māori advisors from each agency, was established. Over the next two years, the Strategic Māori Advisory Group will work to progress iwi and Māori participation and leadership across the SASWB. The Strategic Māori Advisory Group is connecting with mana whenua, te rōpū whai, and Papakura Marae. Te Puni Kōkiri is supporting the SASWB Implementation Office team in this mahi.

Te Tiriti o Waitangi is the foundation of both success frameworks

Using Te Tiriti as the foundation of the success frameworks:

- recognises pre-existing Māori rights and the relationship with the Crown (including government agencies and local government). The Crown's responsibility to Te Tiriti is to protect existing and long-held Māori interests, to confer the rights of equal citizenship on Māori, including the right to equity of outcomes
- sets out a framework for a relationship between two peoples, recognising and respecting their mana and tapu, while considering how they might co-exist in one place staying true to their respective cultures, needs, and societal norms
- offers a useful means to check the health of relationships at all levels of PBIs, exploring power dynamics, cultural safety, the recognition of mana and tapu, and the extent societal issues affecting groups have been mitigated to achieve equity of outcomes.

Table 1: The articles of Te Tiriti in Te Reo Māori and a high-level overview of what giving effect to the articles means for the PBIs¹

<p>Article 1 – Kāwanatanga</p> <p>Ko nga Rangatira o te Wakaminenga me nga Rangatira katoa hoki ki hai i uru ki taua wakaminenga ka tuku rawa atu ki te Kuini o Ingarani ake tonu atu-te Kawanatanga katoa o ratou wenua.</p>	<p>Goal for PBI: Governance and management reflects a modern and inclusive approach</p> <p>Māori leaders and Māori are influential in decision-making positions at all levels. Māori input is supported at all levels of the PBI, including decision-making, prioritising, purchasing, planning, policy, implementing, and evaluating services.</p>
<p>Article 2 – Tino rangatiratanga</p> <p>Ko te Kuini o Ingarani ka wakarite ka wakaee ki nga Rangatira ki nga hapu-ki nga tangata katoa o Nu Tirani te tino rangatiratanga o o ratou wenua o ratou kainga me o ratou taonga katoa. Otiia ko nga Rangatira o te Wakaminenga me nga Rangatira katoa atu ka tuku ki te Kuini te hokonga o era wahi wenua e pai ai te tangata nona te Wenua-ki te ritenga o te utu e wakaritea ai e ratou ko te kai hoko e meatia nei e te Kuini hei kai hoko mona.</p>	<p>Goal for PBI: Māori have self-determination</p> <p>PBIs are working in partnership with Māori providers and promoting and championing their work. PBIs are creating and resourcing opportunities for Māori to exercise tino rangatiratanga, control, authority, and responsibility over Māori wellbeing. PBIs are creating kaupapa Māori solutions, and ensuring Māori are not disadvantaged by their choices. For some, this will mean the development of ‘by Māori, for Māori as Māori’ initiatives, opportunities, and the restoration of iwi self-management.</p>
<p>Article 3 – Oritetanga</p> <p>Hei wakaritenga mai hoki tenei mo te wakaaetanga ki te Kawanatanga o te Kuini-Ka tiakina e te Kuini o Ingarani nga tangata maori katoa o Nu Tirani ka tukua ki a ratou nga tikanga katoa rite tahi ki ana mea ki nga tangata o Ingarani.</p>	<p>Goal for PBI: Equitable outcomes for Māori</p> <p>This goal is to reduce disparities that exist between Māori and non-Māori by addressing current systems and policy settings that maintain them. PBIs are ensuring Māori are equitably represented. For example, recruitment processes reflect and value cultural competencies and active retention and recruitment of Māori staff.</p>
<p>Ritenga Māori declaration – Wairuatanga²</p> <p>E mea ana te Kawana ko ngā whakapono katoa o Ingarani, o ngā Wetereiana, o Roma me te ritenga Māori hoki e tiakina ngatahitia e ia.</p>	<p>Goal for PBI: Respectful engagement that recognises Māori values</p> <p>This goal is focused on the extent to which engagement with Māori is informed by respect for and knowledge of Māori spiritual dimensions of wellbeing. Evidence of an investment of time and/or money that ensures cultural/spiritual practices are accorded proper respect, attention, and are Māori led.</p>

We used this framing to create questions for the PBIs and their central government partners when reflecting on the PBIs’ progress and success.

¹ We acknowledge the guidance of Maria Marama, Glenis Hiria Philip-Barbara, and Katrina Taupo, Te Puni Kōkiri in developing the table.

² The Ritenga Māori declaration is often referred to as the ‘fourth article’ or the ‘verbal article’ and reflects the right to freedom of religion and beliefs. For further information see: <https://www.health.govt.nz/system/files/documents/pages/whakamaui-tiriti-o-waitangi-framework-a3-aug20.pdf>; https://www.hrc.co.nz/files/4914/5497/4522/Waitangi_Poster_2016a.pdf; <https://www.health.govt.nz/our-work/populations/maori-health/te-tiriti-o-waitangi>

SASWB success framework (maturity-based)

Rationale for a maturity-based success framework

Working collaboratively with SASWB, we developed a maturity-based success framework. A maturity-based success framework demonstrates the phases of development for an initiative or programme. The maturity-based framework is intended to be used by the SASWB and other similar initiatives (i.e., government agency-led PBIs with multiple government agency members, a government agency champion, and an independent non-government chair).

Developing a maturity-based success framework recognises:

- The mechanism of change in this type of PBI is cross-sector collaboration and collective action, which takes time to realise the desired benefits (Wilks et al., 2015; Crimeen et al., 2017). Using a maturity framework demonstrates the progression of the PBIs, focused first on getting the foundational structures in place to facilitate collaboration and collective action to create system change for positive whānau outcomes.
- The strategic direction and actions for the PBI, together with their performance measures, are developed and adapted locally to reflect people and place. The SASWB have recently completed their five-year Strategy (2020 – 2025) and two-year Action Plan. The maturity-based framework does not set the strategic direction of the PBI. The framework focuses on the value and contribution of the PBI at a macro-level.
- Externally imposed measurement or performance frameworks can constrain the dynamic and adaptive nature of the PBIs through restrictive measures of success (Cabaj and Weaver, 2016). The maturity-based framework offers flexibility and enables insights into PBI establishment and maintenance of collective and adaptive ways of working to enable system improvement and improved outcomes for whānau.
- PBIs have a depth of evidence and insights, reports, and processes on which to draw on. The maturity-based success framework draws on this evidence base and minimises additional data collection for the PBI beyond a reporting function.
- Using a maturity-based success framework enables a shared learning approach regionally and nationally through sharing the progress and success story of the PBIs. The insights from the PBIs can influence policy direction at the national level, if mechanisms exist to inform relevant central government agencies.

Purpose of the SASWB success framework

The PBI maturity-based success framework has the following objectives, to:

- guide the establishment of new PBIs or similar approaches in other regions
- manage central government funders' expectations on the ongoing development of PBIs from their establishment to maturity
- inform funders on the value and merit of PBIs or similar approaches over the long-term
- facilitate a shared learning process with central government agencies and the Social Wellbeing Board to adopt the learnings from the PBIs to improve social sector systems.

The maturity-based success framework

Figures 1 and 2 below are the maturity-based success framework.

Figure 1 is an overview of the framework. The figure is read from left to right; that is, flowing from establishment, test and learn, collective actions to collective outcomes stages. The framework covers four tiers of the PBI:

- The Te Tiriti maturity framing draws on the work of Te Arawhiti/The Office for Māori Crown Relations on building closer partnerships with Māori. In particular, our stages in this tier reflect three areas of engagement central to the Te Arawhiti work (collaborate, co-design, empower).³
- Central government (CG) including Ministers, the Social Wellbeing Board, and agencies. This focuses on the devolution of decision-making and on using learnings from the PBIs to strengthen social sector processes. This tier acknowledges that central government has a key role in enabling the PBIs, and central government agencies can through their funding and decision-making processes inhibit PBIs collective action and system change contribution. As noted in our main evaluation of PBIs, central government agencies need to become more fluent in holding the tensions that arise from devolved decision-making (Litmus, 2019).
 - We have referred to this tier as the 'national' level.

To fully embrace systems change, funders must be prepared to see how their own ways of thinking and acting must change as well. (Kania, 2018 p5).

- PBI maturity reflects the structures, processes, people, resources, and time needed to develop the foundations of a shared vision and collective action to create sustained positive whānau outcomes based on system change.

³ <https://tearawhiti.govt.nz/assets/Tools-and-Resources/Building-closer-partnerships-with-Maori-Principles.pdf>

- We have referred to this tier as the 'regional' level.

Systems change is about shifting the conditions that are holding the problem in place (Kania, 2018 p3).

- Whānau represent the heart of the PBIs and the transformation of processes, from responding to a one-off individual or whānau needs and aspirations to whānau self-determining solutions for themselves and their communities.
 - We have referred to the community as the 'whānau' level.

Figure 2, based on the high-level framework, presents criteria demonstrating progression for each of the tiers. The criteria focus on the ways of working across the range of stakeholders (collective action based on a whānau-centred approach), and the contribution of the PBIs to creating sustained system change to effect positive whānau outcomes.

Figure 2 also presents some key conditions needed to set up a PBI in the Pre-establishment criteria.

Figure 1: Overview of the maturity-based success framework across the PBI tiers



Figure 2: Criteria demonstrating progression in the maturity-based success framework across the tiers

Tiers	Pre-establishment	Establishment	Test and learn	Collective action	Collective outcomes
Māori-Crown	Recognition siloed agency approach to address complex needs is not working	The Crown and Māori work together to determine the issues/problems and develop solutions together that are reflected in proposals. Each party retains its own decision-making ability.	The Crown and Māori partner to determine the issue/problem, design the process, and develop solutions. The Crown and Māori make joint decisions.	Māori decide and the Crown assists in implementing the decision made by Māori.	
National	Recognition siloed agency approach to address complex needs is not working PBI placed in area with persistent social and economic challenges	Mandate from Cabinet to create a PBI with local decision-making rights Funding is allocated to create and enable the PBI structure	Central government provides ongoing funding to support the work of the PBIs Lead agency supports PBIs' flexibility and manages lightly, recognising the time needed to develop structures and test and learn	Lead agency creates pathway for PBIs to share local insights and identify new opportunities for the work of the PBI (e.g., Joint Venture)	Lead agency uses learnings from PBIs to change social sector process, policies, and procedures at a national level
Regional	A readiness to work differently amongst local leaders Evidence of attempts to work collectively	Regional cross-agency leaders establish formal PBI structures (e.g., governance, mgmt., backbone function) Local leaders (e.g., PBI Board Chair) know the local area and the people and are committed for the long-term Local evidence is used to refine the collective vision Local organisations involved in the PBI develop local protocols for consent and data sharing	PBI has an effective tiered structure of governance, management, and operations based on relationships, trust, and a shared vision Local leaders hold PBIs accountable to the community PBI members develop a growth mindset, are open and flexible in their approach, and willing to trial new ways of working Local evidence is used to develop collaborative initiatives based on a whānau-centred way of working	Agencies and organisations on the PBI governance group seek to influence their organisations to improve systems and processes based on PBI evidence PBIs are testing whānau-centred way of working/ initiatives and building frontline provider capabilities Local evidence is used to assess initiatives and refine the way of working PBIs widen interactions with other inter-sectoral agencies to address whānau aspirations (e.g., economic agencies)	PBI has created and maintained effective processes for cross-agency collective action Local system change has resulted in positive outcomes for whānau PBIs are influencing national level policy and practice and new opportunities are emerging to effect wider system change
Whānau	Whānau are disempowered by social sector agencies and needs are not met	Research with whānau identifies needs, aspirations, and priorities	Whānau have a voice in what is working and not working in the services they receive	Whānau are partners in the co-design services	Whānau determine solutions for their communities Positive outcomes for whānau

Using the maturity-based success framework

The application of the maturity-based success framework will vary depending on the PBI's stage of development. The following evaluation approaches are proposed across the maturity stages.⁴

Pre-establishment: Regional stakeholders and central government can use the conditions listed in Figure 2 to assess the potential to establish a PBI or what further work is needed to create the 'right' conditions for a PBI (or similar initiative) to flourish.

Establishment and test and learn: The evaluation of the establishment and early implementation of the PBI is focused on assessing governance and operation structures, changes in ways of working, engagement with whānau, and early system change. The evaluation design will reflect the process and emerging outcomes evaluation completed for SASWB and Manaaki Tairāwhiti in 2019 (Litmus 2019). It may also use the collective action assessment tool (in Appendix 3).

Collective action and collective outcomes: At these maturity stages, PBIs need to demonstrate collective cross-agency action is creating sustained system changes which benefit whānau. Assessing system change is not easy and is complicated when multiple organisations are involved at different levels within the social sector system (Latham, 2014). We have taken a pragmatic and macro-level approach to demonstrate the contribution of the PBIs to system change using a case study approach. Creating case studies, and considering the enablers and barriers they reveal will support sharing learnings with central government agencies to enable, as appropriate, wider system improvement.

In assessing system change, we use the six interdependent conditions of systems change from Kania et al. (2018): policies, practices, resource flows, relationships and connections, power dynamics, and mental models.

A PBI can be at different levels of maturity across the tiers

Assessing the overall maturity of PBIs is challenging as the tiers may be at different levels of maturity. For example, the PBI and whānau tier may be in the collective action stage with the development of local or regional system change based on co-design with whānau. However, maturity in giving effect to Te Tiriti or central government agencies adopting the learnings from PBIs may be at an establishment phase.

Having this level of variation is expected as the work of the PBI will precede national-level changes and variations will occur across the different initiatives being trialled. In using the

⁴ Appendix 3 contains other alternative evaluation methods that may be appropriate in other PBIs or similar initiatives.

case study approach, the intent is to generate productive discussion both regionally and nationally about the case study insights for both the PBIs and the wider social sector system.

Reflective questions to inform success case development

To develop the case study template, we developed reflective questions based on the tiers and the expected outcomes at the collective action and outcomes stages (Table 2).

Table 2: Overview of reflective questions to guide the case study

PBI initiative	Key reflective questions to explore
Overview of success story	<ul style="list-style-type: none"> ▪ For what reason is this PBI initiative a success in enabling system change? ▪ What evidence supports the success story?
Te Tiriti o Waitangi	<ul style="list-style-type: none"> ▪ Article 1 – Kāwanatanga: How are Māori influential decision-makers at all levels of the PBI? ▪ Article 2 – Tino rangatiratanga: How is self-determination for Māori evident in the PBI? ▪ Article 3 – Oritetanga: How does the work of the PBI strive for and deliver equitable outcomes for Māori? ▪ Ritenga Māori declaration – Wairuatanga: How is the work of the PBI framed by te ao Māori, tikanga Māori, and mātauranga Māori?
Demonstrating local system change	<p>The following questions seek to identify the system change conditions. Not all questions will be relevant:</p> <ul style="list-style-type: none"> ▪ Policies: What policies, rules, regulation, or priorities have changed to enable positive whānau outcomes? ▪ Practices: What practices or institutional behaviours (both formal and informal) have changed? ▪ Resource flows: How have flows of money, people, information, and other resources changed? ▪ Relationships: How have pathways for whānau changed to support and enable them? ▪ Power: How has the initiative changed power distribution both formally and informally? ▪ Mindset: How have deeply held assumptions or beliefs changed?
Whānau outcomes	<ul style="list-style-type: none"> ▪ How have the system changes affected or benefited whānau? ▪ How has the system changed affected or benefited whānau Māori?
Central government	<ul style="list-style-type: none"> ▪ How has central government enabled system change at regional and national levels based on PBI evidence? ▪ If implemented, what are the potential ripple effects for whānau Māori and whānau outcomes?

SASWB case study template

We developed a case study template for SASWB to use going forward (Appendix 4). We tested and refined the case study template with SASWB by preparing a draft case study.

The case study template:

- presents a high-level overview of SASWB for those who know little about the PBI
- demonstrates progress against the maturity phases for the four tiers
- provides an example of one initiative that demonstrates collective action contributing to system change which is improving whānau outcomes
- details learnings to inform changes to social sector systems both regionally and nationally, and the enablers and barriers to the learning transfer.

Manaaki Tairāwhiti success framework

Manaaki Tairāwhiti continue to refine the framework

The Manaaki Tairāwhiti Governance Group was unable to review the success framework by December 2020. The success framework for Manaaki Tairāwhiti will continue to evolve based on their feedback.

Rationale for the success framework for Manaaki Tairāwhiti

Manaaki Tairāwhiti is a group of local iwi and cross-sector social leaders focused on working together to deliver what is needed for whānau to flourish in Tairāwhiti. In October 2015, Selwyn Parata, Chair of Te Rūnanganui o Ngāti Porou, approached central government about the Tairāwhiti Collective becoming a PBI. The purpose of the PBI was to improve the oversight of social services delivered in Tairāwhiti. These leaders wanted a deeper understanding of the needs of Tairāwhiti and to change the social sector systems to improve outcomes for whānau. The updated vision of Manaaki Tairāwhiti is:

All Tairāwhiti whānau are flourishing

The structure of Manaaki Tairāwhiti gives effect to Te Tiriti with iwi leadership and Māori-led decision making at all levels of the PBI. Implied in the vision of Manaaki Tairāwhiti is the devolution of decision rights to iwi to effect positive change for whānau. For Manaaki Tairāwhiti, the most important lines of accountability are to whānau, hapū, and iwi.

The essence of Manaaki Tairāwhiti is in its name. Manaaki is to support, give hospitality to, protect, look out for, show respect, generosity, and care for others, including caring for relationships. Manaaki Tairāwhiti is a movement to transform relationships at every level of the PBI from the iwi-led governance group to frontline staff and whānau relationships.

The success framework reflects the essence and iwi origins of Manaaki Tairāwhiti.

Purpose of the framework for Manaaki Tairāwhiti

For Manaaki Tairāwhiti the primary objective of the success tool is to show how local cross-agency relationships and testing new collective ways of working improve systems and will contribute to whānau flourishing in Tairāwhiti.

Other secondary objectives are to:

- demonstrate the value of the work of Manaaki Tairāwhiti to MSD and Social Wellbeing Agency.
- facilitate a shared learning process with central government agencies and the Social Wellbeing Board to adopt the learnings from the PBIs to improve social sector systems.

These objectives are assessed within a Tiriti o Waitangi framework that reflects the Crown partnership with regional iwi leaders.

The Manaaki Tairāwhiti success framework

We worked closely with Manaaki Tairāwhiti to reflect the essence of the PBI. The framework needed to reflect Te Tiriti and be based in a Māori worldview. We acknowledge the support of Glenis Hiria Philip-Barbara and Leslyne Jackson in the development of the framework. The kahikatea was used to demonstrate the development of the PBI. The kahikatea was selected as the tree grows in the region. The Manaaki Tairāwhiti way of working is like the intertwined roots of the kahikatea creating strength to enable whānau to flourish.

Me Uru Kahikatea, Like a Grove of Kahikatea

Ko te Kahikatea	The Kahikatea
He rakau tu ki te repo	Prefers swampy ground
Engari, kahore e matotoru	But, stability is impaired
Te tu, kei te repo ke hoki	By the unstable
Nga pakiaka	Root environment
No reira	Therefore
Ka whakaritea e Tane	The God Tane ordained
Me whiriwhiri nga paiaka	That their root systems should intertwine
Pakari ana te tu	To ensure stability
Torotika ana	And uprightness
E ai ki te korero nei	Thus the saying
"Me uru Kahikatea"	"Me uru Kahikatea"
Tera pea, kei te repo	If we are on
Tatou e te lwi	shaky ground, then
Ma tenei korero tatou	this proverb is
E ara ake	a guide

(Federation of Māori Authorities, 2017⁵)

⁵ <https://pukeroa.co.nz/wp-content/uploads/2017/12/30-years-of-foma.pdf>

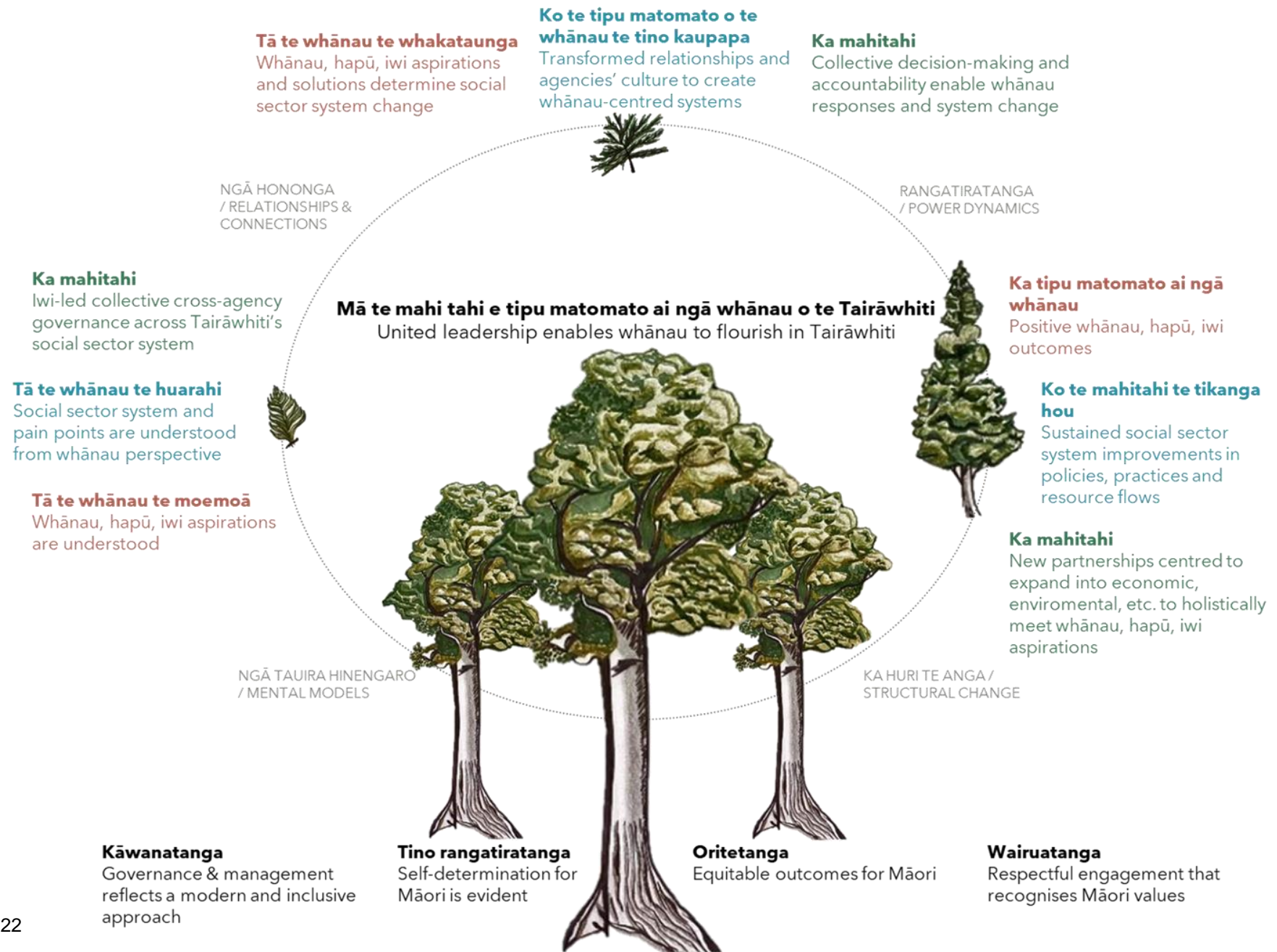
Figure 3 below presents the kahikatea framework depicting the desired growth of Manaaki Tairāwhiti across time.

The kahikatea framework is read clockwise starting from seedling (left) to small kahikatea (top) to full kahikatea (right) to mature kahikatea (bottom). At the foundation – the intertwined roots – of the mature kahikatea are the articles of Te Tiriti.

The model uses the growth phases of kahikatea to demonstrate change in governance (green), adoption of the Manaaki Tairāwhiti way of working using a test, learn and adapt approach (blue), and whānau flourishing (red). When these three interconnected domains work together, they will lead to local system change for whānau benefit. System change is based on:

- Kania et al's 'Six interdependent conditions of systems change': Kania et al's six conditions of systems change include transformative and structural changes, as well as changing relationships and power sharing (see Appendix 2).
- The Vanguard method of system improvement, as used by Manaaki Tairāwhiti. The Vanguard method is a people and place centred approach which incorporates system theory and intervention theory. It recognises the need to shift mindsets and organisational culture for sustained system change.

Figure 3: Overview of the success framework for Manaaki Tairāwhiti



Using the success framework for Manaaki Tairāwhiti

The application of the kahikatea success framework will vary depending on the stage of the growth and maturity of Manaaki Tairāwhiti. The following evaluation approaches are proposed across the stages:

Kahikatea seedling: The evaluation of the establishment and early implementation of the PBI is focused on iwi-led, cross-agency governance and establishing a way of working based on whānau aspirations. The evaluation design will reflect the process and emerging outcomes evaluation completed for Manaaki Tairāwhiti and SASWB in 2019 (Litmus 2019).

Small kahikatea to full kahikatea: At these growth stages, Manaaki Tairāwhiti can demonstrate the effectiveness of their iwi-led cross-agency governance and the Manaaki way of working is creating system changes that benefit whānau. We have taken a case study approach to demonstrate success and share learnings with central government to enable, as appropriate, wider system improvement.

In assessing system change, we use the six interdependent conditions of systems change from Kania et al (2018): policies, practices, resource flows, relationships and connections, power dynamics, and mental models.

Mature kahikatea: At this growth stage, Manaaki Tairāwhiti needs to demonstrate how their governance and way of working is sustainably enabling whānau to flourish.

Reflective questions to inform case study development

To develop the case study template, we developed reflective questions based on the small kahikatea to full kahikatea stages (Table 3).

Table 3: Overview of the reflective questions to inform the Manaaki Tairāwhiti case study

Domain	Key reflective questions
Overview of success story	<p>For what reason is this system change initiative a success? Ma te aha ka puta ngā hua o te kaupapa nei?</p> <p>What evidence supports the success story? He aha i pērā ai?</p>
Te Tiriti o Waitangi Kei a wai te mana whakahaere?	<ul style="list-style-type: none"> ▪ Article 1 – Kāwanatanga: How are Māori influencing decision-making at all levels? ▪ Article 2 – Tino rangatiratanga: Is self-determination for Māori evident in the initiative? ▪ Article 3 – Oritetanga: How does the initiative strive for and deliver equitable outcomes for Māori? ▪ Ritenga Māori declaration – Wairuatanga: How is the initiative framed by te ao Māori, tikanga Māori, and mātauranga Māori?
Demonstrating local system change Ka mahitahi rānei ngā roopu whakahaere?	<p>The following questions seek to identify the system change conditions. Not all questions will be relevant:</p> <ul style="list-style-type: none"> ▪ Policies: What policies, rules, regulation, or priorities have changed to enable positive whānau outcomes? ▪ Practices: What practices or institutional behaviours (both formal and informal) have changed? ▪ Resource flows: How have flows of money, people, information, and other resources changed? ▪ Relationships: How have relationships and agencies cultures transformed? ▪ Power: How has initiative changed power distribution both formally and informally? ▪ Mindset: How have deeply held assumptions or beliefs changed?
Enablers and barriers Ka āhei rānei ngā āhuatanga? Kua toko rānei ki te hapori whānui?	<ul style="list-style-type: none"> ▪ What is enabling this change? What is hindering the change? ▪ How sustainable or sticky are the changes?
Whānau outcomes Ka tipumatomato rānei te ngā whānau?	<ul style="list-style-type: none"> ▪ How have the system changes benefited whānau? ▪ How has the system changed effected or benefited whānau Māori?
Sharing learnings He aha ngā akoranga hou?	<ul style="list-style-type: none"> ▪ What are the key learnings to be shared with other PBIs and iwi in other regions and central government agenices at a national level?

Manaaki Tairāwhiti case study template

We developed a case study template for Manaaki Tairāwhiti to use going forward (Appendix 5). We tested and refined the case study template with Manaaki Tairāwhiti by preparing a draft case study.

The case study template:

- presents a high-level overview of Manaaki Tairāwhiti for those who know little about the PBI
- demonstrates progress against the kahikatea framework
- provides examples of the Manaaki way of working demonstrating the test and learn approach to system improvement activities
- shares insights of challenges and opportunities for further system change.

Future directions

The case studies have multiple uses

Manaaki Tairāwhiti, SASWB will work with MSD to prepare an annual case study around June.

The case studies will enable a national and regional level shared learning approach

MSD will develop a process to disseminate the case studies with the Social Wellbeing Board and other relevant central government agencies. The process will create formalised pathways to share:

- the evidence-based insights from the PBIs to inform wider system change for whānau benefit
- insights into removing barriers to system change and seeking to address these.

MSD, Manaaki Tairāwhiti, and SASWB need to review the dissemination process to assess whether they are enabling shared learning and enabling action.

The case studies can be used to share learnings between Manaaki Tairāwhiti, SASWB, and other PBIs.

The case studies will contribute to future evaluations

Future evaluation of Manaaki Tairāwhiti and SASWB can draw on the case studies as evidence of their collective action to transform social sector systems for improved whānau outcomes. Future evaluations will also need to review the appropriateness of quantitative methods discussed in the process and emerging outcomes evaluation report (Litmus, 2019). Such methods may become worthwhile and feasible in the future depending on PBI activities.

The case study approach needs to adapt with the PBIs

PBIs are adaptive in responding to their people and place. Over time, perhaps two years, the case study approach should be reviewed to assess its ongoing value and contribution as a shared learning approach for the PBIs, MSD, and other stakeholders.

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Appendices

Appendix 1: Simplified PBI theory of change

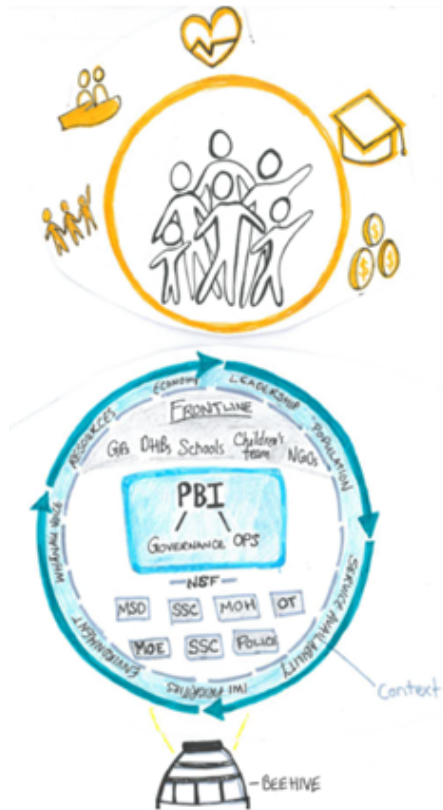
Appendix 2: Key insights from the literature review

Appendix 3: Other tools to assess collective action and collective impact

Appendix 4: SASWB case study template

Appendix 5: Manaaki Tairāwhiti case study template

Appendix 1: Simplified PBI theory of change



PBI way of working across the layers

- Whānau:** Whānau are at the centre of the work of PBIs
- Frontline providers**
Use whānau-centred collective approach
Use flexible and holistic delivery
Have respectful relationships
Are committed for long-term
- Local backbone function**
Provide evidence to inform decisions
Share lessons
Build capability and trust across agencies
Effective project management
- PBI operations**
Enable collective action around vision
Work on system improvements
Work at appropriate pace of change
Have sufficient capacity and resources
Share insights
- PBI governance**
Effective governance on shared vision
Prioritise system improvement
Shared measurement of success
Funding flows to where needed
- National support function**
Offer effective support to PBIs
Increase understanding of PBIs
Links PBIs to emerging opportunities
- Ministers and central govt agencies**
Create enabling environment
Devolved decision-making
Allocate funding to increase capacity
Act on learnings to inform system change

Early changes

- Trusted cross-sector relationships established
- Collective action on a whānau-centred way of working
- Whānau are positively engaged
- System barriers and opportunities identified to address whānau needs
- Positive whānau benefits (short-term, on pathway to transform) as defined by whānau
- Influenced system change locally

System changes nationally

Sustained social sector system change

Whānau changes

More whānau benefit from improved service experience and positive whānau-defined outcomes

Appendix 2: Key insights from the literature review

The success framework has an evidential base

We conducted a literature review to identify success frameworks for PBIs. Below are the key insights from the literature review. The literature findings draw on published journal articles, reports, and recognised resources from collective impact and place-based approach forums. We structured the literature review around the three domains for demonstrating success: collective ways of working, social sector systems change, and whānau outcomes.

Collective ways of working

We looked to collective impact to explore insights for assessing collective action, as some literature points to it as a method to frame PBIs (Clear Horizon et al., 2018, Lankelly Chase, 2017). The theory and practice of collective impact have been refined over the past decade (ORS Impact, 2018). Key insights from recent literature (2015 to 2020) highlight:

- **Equity and people at the centre:** In 2015, Kania and Kramer argued people most affected by an issue must be included in the change process. Cabaj (2016) advocated for shifting community to the centre of the change process.
- **The Eight Collective Impact Principles of Practice:** In 2016, the Collective Impact Forum updated the framework to include the following eight principles: equity, community inclusion, cross-sector partners, data to learn and adapt, leadership, relationships and trust, local context, and system-focused (Collective Impact Forum, 2016). These principles are increasingly recognised as important to achieving population change (Cabaj and Weaver, 2016).
- **Backbone support:** In 2016, Cabaj and Weaver (2016) emphasised the importance of the backbone support role to test, learn and adapt within collective impact initiatives.
- **Strategic learning approach:** Initially, collective impact was premised with the need for a shared measurement to frame and guide collective action. Cabaj (2016) argued for the shift to a strategic learning approach because shared measurement frameworks were resource-intensive and created rigidity in an adaptive process.

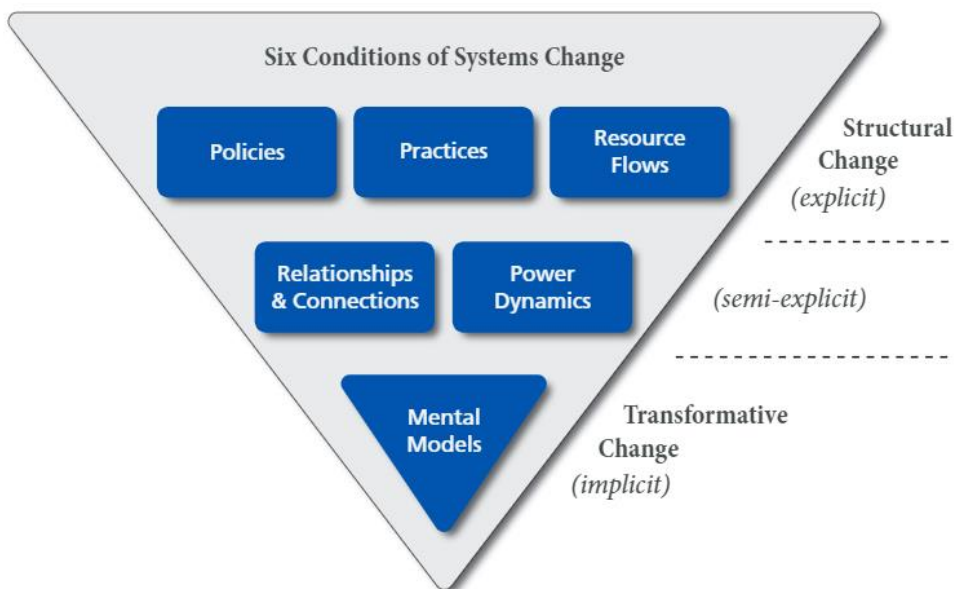
Social sector systems change

The 'six interdependent conditions of systems change' (Kania et al., 2018) stood out in the literature as relevant to the PBIs (given the PBI focus on systems change). Their framework draws from the extensive literature on systems change, systems thinking, and knowledge from experienced practitioners. In reviewing this system model, we were seeking to determine how to demonstrate PBIs' contribution to social sector system change at local, regional, and national levels.

Shown in Figure 4, the six interdependent conditions of systems change play a role in holding a social or environmental problem in place. These six conditions (policies, practices, resource flows, relationships and connections, power dynamics, and mental models) are visible to varying degrees to different players in the system.

The conditions are intertwined and interconnected, which can be mutually reinforcing or counteracting. These conditions are classified across the spectrum of explicit to implicit. The implicit conditions lead to transformative change, and explicit conditions lead to structural change. Shifts in system conditions are more likely to sustain when working at all three levels of changes (explicit, semi-explicit, and implicit). To fully embrace system change, funders must be prepared to see how their ways of thinking and acting must change as well.

Figure 4: Six interdependent conditions of systems change (Kania et al., 2018)



Whānau outcomes

The PBI initiatives are holistic, adaptive, and dynamic to meet the changing needs of whānau. This section draws on key insights from the literature focusing on whānau outcomes. We draw mainly on Māori, Pasifika, and indigenous literature (the PBIs' communities of interest). We explored whether existing whānau outcome models are relevant and useful in determining the success of the PBIs to create positive whānau outcomes. We found:

- Traditional social and wellbeing measurement frameworks overlook whānau strengths:** Measurement frameworks tend to benchmark Māori and Pasifika against non-Māori and non-Pasifika population groups. Many researchers acknowledged this approach risked labelling Māori and Pasifika and their families as 'problematic'. These approaches have been described as a 'problem-saturated focus' (McCalman, 2015).

- **Māori and Pasifika models emphasise multi-dimensional concepts of health and wellbeing:** Highly recognised models include Professor Durie’s Māori health and wellbeing model (Te Whare Tapa Whā) and the Fonofale model which incorporates the values and practices of Samoans, Cook Islanders, Tongans, Niueans, Tokelauans, and Fijians. Whānau Ora is another whānau-centred approach with the single overarching aim of getting the best outcomes for whānau and families. This approach supports whānau and families to identify the aspirations they have to improve their lives and build their capacity to achieve their goals (Baker et al., 2015).
- **A holistic whānau-centred framework is needed:** The Child and Youth Wellbeing Strategy offer a useful multi-dimensional framework which incorporates a range of quantitative indicators (DPMC, 2019).

Reflective practice is needed to support learning and adaptation by PBIs and central government agencies

The section below draws on key insights from the literature focusing on learning as a tool for social change. We draw mainly on international literature. We acknowledge the PBIs have existing learning processes and systems in place.

The PBI success framework needs to be located within a reflective and learning approach that is fit for purpose for the PBIs and the central government

The PBIs are well placed to share evidence-informed learnings with central government on social sector system improvements. The PBIs want to influence national-level system improvement processes and enable changes to universal policies to advance equity. So far, methods used by PBIs to contribute to national system change tend to be opportunistic. A process is needed for regional whānau and system change insights to be shared with and used by the centre to inform and improve the social sector system.

Below are three examples of shared learning approaches.

Example 1: Intentional group learning (FSG, 2015)

Intentional group learning requires setting time for stakeholders to come together with a clear purpose for learning. Intentional group learning needs to leverage off existing organisational processes and structures, while also identifying new ways to influence change and additional required resources. The three goals of intentional group learning are to:

1. Individually and collectively increase group awareness and understanding and to develop new perspectives: groups engage in learning together to understand better an experience, situation, system, issue, or opportunity, as well as understand different and potentially competing perspectives.

2. Generate new ideas and solutions: groups engage in learning to identify and refine ideas that could inform planning, design, or implementation; this might include generative discussions about solutions and possible actions.
3. Make important decisions: groups engage in learning to reach consensus or agreement on a path forward.

Intentional group learning requires a clear purpose for learning, adequate planning and preparation, and skilled facilitators.

Example 2: Strategic learning approach (Centre for Evaluation Innovation, 2014)

A strategic learning approach is the use of data and insights to inform decision-making about strategy development and implementation. It attempts to bridge the gap between learning and strategy (Coffman and Beer, 2011).

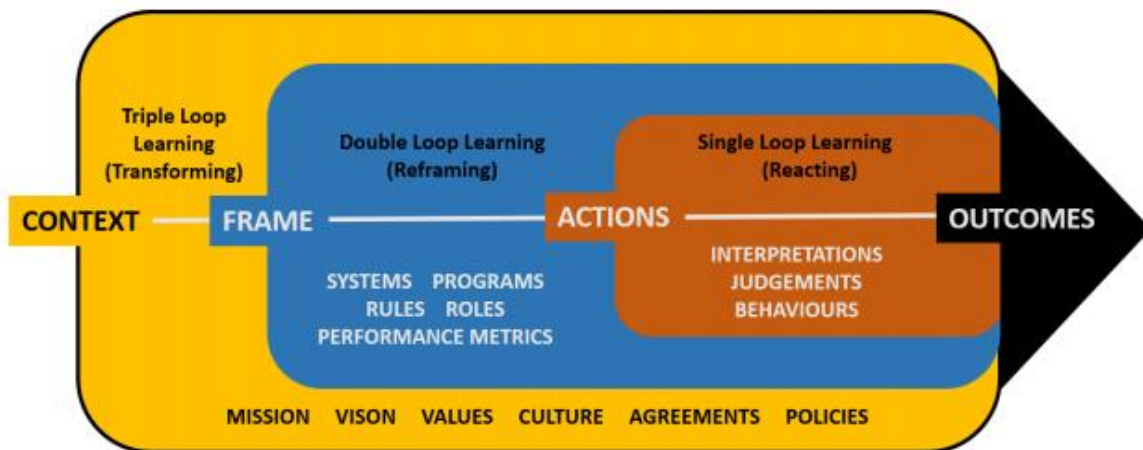
A strategic learning approach requires significant resources and commitment. We question the use of strategic learning approach as described within the literature because challenges described in the collective impact literature include:

- **A strategic learning approach requires substantial resources.** Strategic learning often requires more ‘hands on’ evaluator and staff time. Evaluators spend time analysing information, meeting with stakeholders and observing, or participating in strategy discussions. Key decision-makers are also heavily involved. Although costs vary, this type of evaluation may require more funds than alternatives (Centre for Evaluation Innovation, 2014)
- **Strategic learning requires an authentic commitment from leadership** to learning and adaptation. This commitment should be demonstrated by an interest in learning combined with an ability to learn. Leaders, for example, should express curiosity about alternative perspectives on strategies or theories of change, acknowledge ambiguity, and respond to flawed strategies in a constructive manner (Centre for Evaluation Innovation, 2014).

Example 3: Triple loop learning approach (Tamarack Institute, ND)

Triple loop learning is used in complex challenges where outcomes are not clearly defined (Figure 5). Triple loop learning explores values, systems, processes, and desired outcomes to narrow down and understand decisions making. Triple loop learning asks questions to seek clarity on the learning focus. For example: how do we decide what is right? And, here's why we want to do this (principles).

Figure 5: Single, double and triple loop learning



Learning awakens us to possibility and acting on possibilities compels us to learn.

Figure 5 provides an overview of the connections and differences between the terms:

- Single loop learning focuses on actions.
- Double loop learning focuses on the frame in which our actions take place.
- Triple loop learning gets to the core of things: our purpose, the values that guide us, and so on.

Methods for demonstrating and evaluating collective working, system change, and whānau outcomes

A common theme across the literature is that multiple methods and approaches are needed to demonstrate and evaluate change. In this section, we present a range of data collection methods used in PBIs and collective impact. Work that collates and compares methods to demonstrate success has already been conducted and published. We draw mainly from Clear Horizon et al. (2018) and the Centre for Evaluation Innovation (2014 and 2017). When other resources are used, we include hyperlinks.

Collective impact initiatives often require multiple approaches to performance measurement and evaluation. (Collective Impact Forum, 2014b)

Methods for demonstrating collective working

- Indicators for collaboration, and collective action and impact (Collective Impact Forum, 2014b, Dupre et al., 2016, Grantmakers for Effective Organisations, 2014)
- Rubrics are gaining in popularity and are viewed as a way to ensure community, cultural, and organisational values are incorporated. Rubrics can be used in reflection exercises.

- Numerous data collection methods being used include: surveys (attitudes, behaviour, skill, satisfaction, knowledge), key informant interviews, focus groups, document review (reports, plans), databases, archival data, observations (written notes, videos, drawings, photos), tests, social media, collaborative inventory, adaptive management logs.
- Approaches and analytical frameworks being used:
 - Principles-focused evaluation
 - Assessing capacity building
 - Qualitative comparative analysis
 - Framework for assessing quality of relationships (Baker et al., 2015)
 - Social Network Analysis/Mapping to tracking and analysing collaboration over time: simple, medium-complexity, and complex applications exist.
 - Human-centred design approaches
 - Connection, compassion, creativity, and transgression as key analytical dimensions of transformative place-based learning (Pisters et al., 2019)
 - Hybridity and integration as an analytical framework (Divay and Silmani, 2018) to measure local collective action by analysing organisational culture and behaviour to act to support local milieu.
- Approaches for reporting and communicating using data to support strategic decision making. (Collective Impact Forum, 2014a).

Methods for demonstrating system outcomes

- Indicators for behaviour and systems change (Collective Impact Forum, 2014b; Clear Horizon et al., 2018)
- Systems mapping: actor maps, mind maps, issue maps, causal loop diagrams (FSG, 2015; Collective Impact Forum, 2014b; Clear Horizon et al., 2018)
- Case studies of cross-sectoral partnerships
- Collaboration for Impact Tool
- Outcomes Harvesting and Mapping
- Impact Log
- Ripple Effect Mapping
- Contributing Analysis and process tracing
- Disrupting Systems Dynamic Framework (US AID, 2016)
- Significant instances of policy and systems improvement
- Episode Study
- Evaluating public policy.

Methods for demonstrating whānau outcomes

- Indicators for whānau outcomes (Baker et al., 2015, Te Puni Kōkiri, 2015)
- Life-story interviews

- Journaling, focus groups, interviews, graphic facilitation, reflective hui, Photovoice (Baker et al., 2015 and Clear Horizon et al., 2018)
- Ethnography and narrative inquiry (Pisters et al, 2019)
- Most significant change and case studies
- Participatory rural appraisal and participatory research: service web, transact maps, power mapping, asset mapping, network mapping before and after
- Outcomes harvesting
- Sensemaker tool for collecting and making sense of stories.
- Talanoa (Vaiote, 2000) and Talaloto (Naufahu, 2018) Pasifika research methodology
- Process tracing dialogue and thematic analysis.

Appendix 3: Collective impact assessment tools

Potential online survey rubric to demonstrate collaboration and collective action of future PBIs

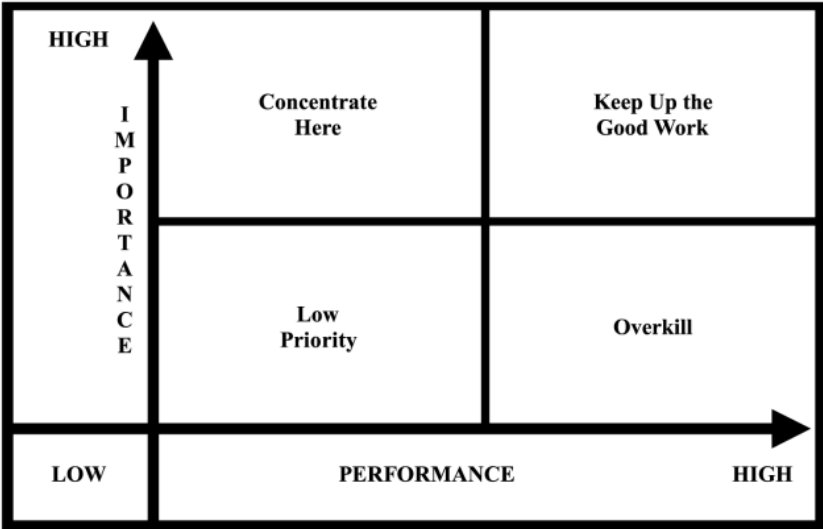
The purpose of the rubric (Table 4) is to assess PBI stakeholders' collaboration and collective action to develop whānau-centred ways of working and deliver system change and whānau outcomes. Drawing on the theory of change for the PBIs, we developed the collective action and collaboration rubric. The tool may be useful for future PBIs, especially in the pre-establishment phase to gain a baseline assessment, and in the test and learn phases of maturity to assess the strengthening of collaboration. The rubric can highlight tiers and areas to strengthen collaboration and collective action.

An annual or biennial online survey of stakeholders tailored to PBI context

The rubric can be set up in an online survey tool such as SurveyMonkey. We recommend open-ended questions are used to focus on areas of particular interest for future PBIs. We also recommend asking an overall rating question on collaboration.

We recommend tailoring the assessment scales to PBI preferences. We include two examples below. One option is to use a maturity-based rating scale (i.e., emerging, developing, consolidating, and highly-developed) against the criteria (markers of success).

A second option, as used in Table 4, is a performance scale (i.e., poor to excellent) with an importance scale (i.e., unimportant to very important). The benefit of using a performance and importance scale is the PBI can assess strength of performance against the importance of this attribute of collaboration and collective action in meeting the shared vision. As demonstrated in the diagram below, analysis using these two dimensions will highlight areas of focus for the PBIs in strengthening collaboration across the layers.



Sample

The survey should be sent out to stakeholders involved to some extent in the work of the PBIs across the tiers, for example:

- PBI governance group members
- PBI operations team
- Frontline providers who engage and work with whānau
- Government agencies, community organisations, and NGOs
- Iwi, Māori organisations, and other community organisations
- National support function
- Central government agencies.

Table 4: Collaboration and collective action rubric of PBI around a whānau-centred way of working

PBI Level	Marker of success	Performance rating				Importance to effectiveness			
		poor <-----> excellent				unimportant <-----> very important			
		1	2	3	4	1	2	3	4
Whānau involved in PBI initiatives	PBI initiatives are focused on whānau-defined needs and priorities								
	Whānau are involved in the design of PBI initiatives								
	PBI initiatives are focused on reducing inequities in the social sector system								
	Whānau have a voice in saying what is working and not working in the services they receive								
	Whānau have service options of Kaupapa Māori and mainstream services								
	Pasifika and other communities PBI are working with have culturally appropriate service options and mainstream services								
	Whānau are empowered to strengthen their right to live as Māori and Pasifika								
Frontline providers	Frontline providers use a holistic whānau-centred approach								
	Frontline providers use flexible and tailored delivery								

PBI Level	Marker of success	Performance rating				Importance to effectiveness			
		poor <-----> excellent				unimportant <-----> very important			
		1	2	3	4	1	2	3	4
PBI operations (the team who work to implement the PBI strategy)	Frontline providers have respected and trusted relationships with whānau								
	Frontline providers are removing system barriers at the local level to empower whānau to achieve their aspirations								
	Frontline providers are culturally safe as they focus on whānau, provide for whānau to be involved in decision-making about them, and contribute to whānau achieving their aspirations								
	Operations team enables collective action around a common purpose								
	Operations team works at a pace of change appropriate to the local context								
	Operations team have sufficient capacity and resources to enable change								
	Operations team works to strengthen relationships with Māori and iwi								
	Operations team works to strengthen relationships with Pasifika and other communities they are working with								

PBI Level	Marker of success	Performance rating				Importance to effectiveness			
		poor <-----> excellent				unimportant <-----> very important			
		1	2	3	4	1	2	3	4
PBI governance	Operations team involves Māori in designing and implementing new initiatives								
	Operations team involves Pasifika and other communities they are working with, in designing and implementing new initiatives								
	Operations team is testing new ways of commissioning and contracting for equitable outcomes								
	PBI has effective governance centred on a common purpose and commitment to desired change								
	PBI Governance Group (GG members align to enable resources and funding to flow where needed by whānau								
	PBI GG works to have respected and trusted relationships with iwi								
	PBI GG works to have respected and trusted relationships with Pasifika and other community organisations (i.e., refugee and migrant community organisations)								
	PBI GG have clear partnership arrangements with iwi								

PBI Level	Marker of success	Performance rating				Importance to effectiveness			
		poor <-----> excellent				unimportant <-----> very important			
		1	2	3	4	1	2	3	4
Government agencies	Levels of trust within the GG are high enough to encourage innovation and risk-taking								
	PBI GG involve iwi in designing and implementing new initiatives								
	PBI GG involve Pasifika and other community organisations in designing and implementing new initiatives								
	PBI GG share decision-making and power-sharing with iwi								
	PBI GG share decision-making and power-sharing with Pasifika and other community organisations								
	PBI strategy focuses on reducing inequities and removing structural racism through system innovation and improvements								
	Government agencies create an enabling environment of devolved decision-making for the PBIs								
	Government agencies enable the flow of resources and funding to enable cross-sector PBI initiatives								

PBI Level	Marker of success	Performance rating				Importance to effectiveness			
		poor <-----> excellent				unimportant <-----> very important			
		1	2	3	4	1	2	3	4
National support function	Government agencies value the role of the PBIs to contribute to an equitable social sector system								
	Government agencies create opportunities to use the learnings from the PBIs to change policies, processes, and practices at national level								
	NSF offers effective support to the PBIs								
	NSF enables linkages and opportunities between the centre and the PBIs								

Appendix 4: SASWB PBI Success Case Template

[This document serves as a template for the SASWB case study. We include instructions in square brackets and italics. The instructions should be deleted before submitting the case study to MSD]

South Auckland Social Wellbeing Board Place-Based Initiative Success Case

The purpose of the success case is to illustrate the progress of the South Auckland Social Wellbeing Board (SASWB) against the Place-Based Initiative (PBI) maturity model with a focus on demonstrating system change for whānau benefit. The success case is intended to transfer learnings to central government agencies to support wider system change.

Overview of the SASWB

[the placement of this section may change over time depending on the needs of the reader and knowledge of the SASWB]

The SASWB is an agency-led PBI consisting of representation from 13 agencies, including local government (Auckland Council), Counties Manukau District Health Board (CMDHB), and an independent non-government chair. Since its inception in 2016, the SASWB has focused on developing new, cross-agency ways of working to meet complex and diverse needs of whānau. Through trialling whānau-centred, cross-agency ways of working, the PBI is identifying system improvements to create improved outcomes for wider whānau.

SASWB's vision is:

All children in South Auckland are healthy, learning, nurtured, connected to their communities and culture and building a positive foundation for the future.

The SASWB's strategic goals over the next five years are:

- Whānau wellbeing and resilience
- Iwi partnership and participation
- Collaboration
- Equitable access.

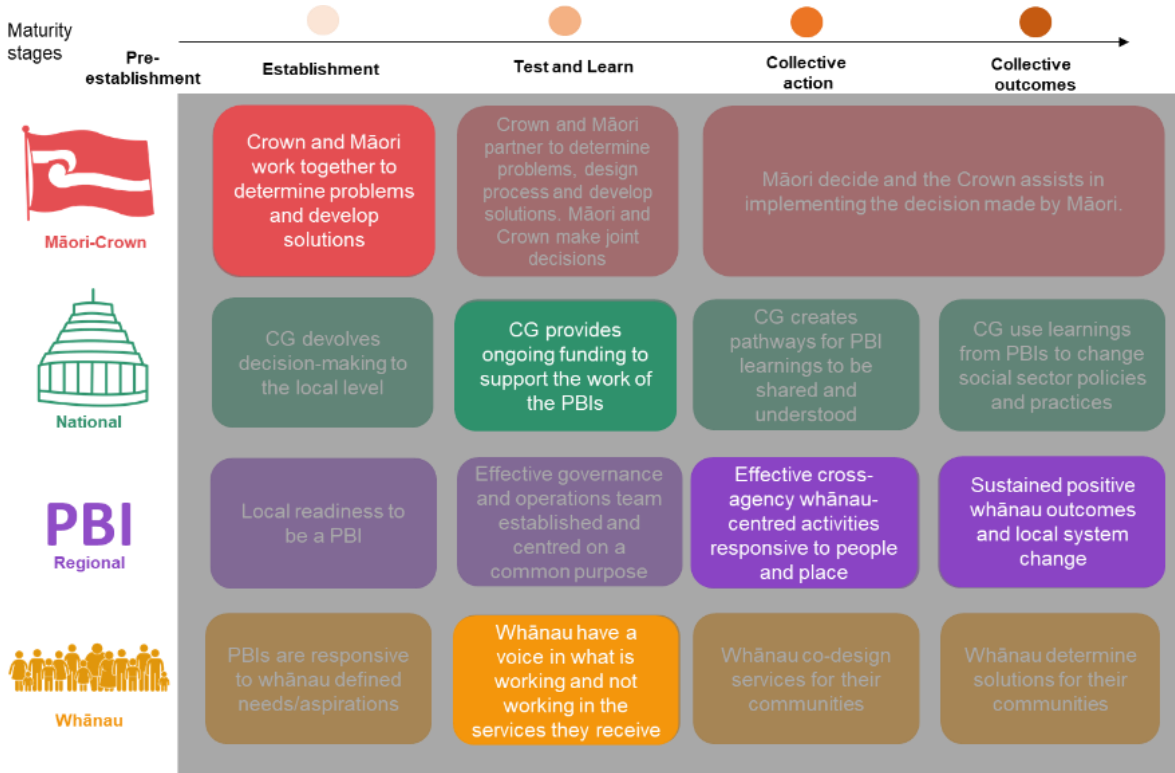
The SASWB has multi-layered governance and operational structure to enable cross-agency collaboration and local system change. In 2019, the Strategic Māori Advisory Group, consisting of strategic Māori advisors from each agency, was established. Over the next two

years, the Group will work to progress iwi and Māori participation and leadership across the SASWB.

The SASWB Implementation Office provides a ‘back bone’ function to prototype planning, implementation and the collection of evidence and insights to enable a ‘test, learn, and adapt’ approach to influencing change at all levels. The Implementation Office is physically located in the Multi-agency Hub - Te Taanga Manawa in South Auckland. Te Taanga Manawa is literally translated as “the embrace of the heart” or “the heart of embrace” but is generally considered to mean “the welcome heart of embrace” in this context.

Figure 1: SASWB stages of maturity

[if relevant, update highlighting in Figure 1]



SASWB is at the collective action stage of maturity for PBI

[this section is a self-assessment by the PBI and should be updated to reflect the PBI’s stage of maturity]

The SASWB is at the collective action/outcome stage. The role of central government and whānau involvement is at a test and learn phase. The partnership between Māori and the Crown is at an establishment phase. Given the level of maturity, the success case focuses on SASWB’s contribution to system change to benefit whānau and the role of central government in using these insights to enhance social sector systems.

[INITIATIVE] illustrates how SASWB's collective action contributes to system change

Background and overview

[included in this section: how the initiative demonstrates maturity stage progression at any of the levels (e.g., central government, PBI, whānau), initiative purpose, stakeholders involved and how, background, specifics on how the initiative demonstrates stage of PBI maturity]

Te Tiriti o Waitangi

[included in this section: how the PBI is giving effect to Te Tiriti o Waitangi and how the PBI is strengthening its relationship with Māori at all levels of the initiative]

Local system change

[included in this section: description of local system change/s using Kania et al's (2018) six conditions of system change as guidance, examples of system change, ongoing development and next steps]

Whānau outcomes

[included in this section: description and example of how the system change benefits whānau, include whānau voice if possible]

Transfer of learning

[included in this section: description and examples of how these learnings have been shared across the region (or other regions) and nationally to central government agencies in Wellington, and how transfer of learnings has been enabled or roadblocked]

Regional: [learnings to other Auckland region/other region]

National: [learnings to Central government agencies in Wellington]

Appendix

[include any relevant documents here, for example SASWB strategy, governance and management structure, additional documentation]

Appendix 5: Manaaki Tairāwhiti case study template

[This document is the Manaaki Tairāwhiti case study template. We include instructions in square brackets and italics.]

Manaaki Tairāwhiti Place-Based Initiative (PBI) Case Study

The purpose of the case study is to illustrate the progress of the Manaaki Tairāwhiti against kahikatea success framework with a focus on demonstrating system change for whānau benefit. The case study is intended to transfer learnings to central government agencies to support wider system change.

Overview of the Manaaki Tairāwhiti

[the placement of this section may change over time depending on the needs of the reader and knowledge of the Manaaki Tairāwhiti]

Manaaki Tairāwhiti is a group of local iwi and social cross-sector leaders focused on working together to deliver what is needed for whānau to flourish in Tairāwhiti. In October 2015, Selwyn Parata, Chair of Te Rūnanganui o Ngāti Porou, instigated the approach to central government for the Tairāwhiti Collective to become a PBI. The purpose was to create oversight of social services delivered in Tairāwhiti. These leaders wanted a deeper understanding of the needs of Tairāwhiti and to change the social sector systems to improve outcomes for whānau. The vision of Manaaki Tairāwhiti is:

United leadership that enables whānau to flourish in Tairāwhiti

The essence of Manaaki Tairāwhiti is its name. Manaaki is to support, give hospitality to, protect, look out for, show respect, generosity, and care for others, including caring for relationships. Manaaki Tairāwhiti is a movement to transform relationships at every level of the PBI from the iwi-led governance group to frontline staff and whānau relationships.

Manaaki Tairāwhiti's goals for 2019/2021 are:

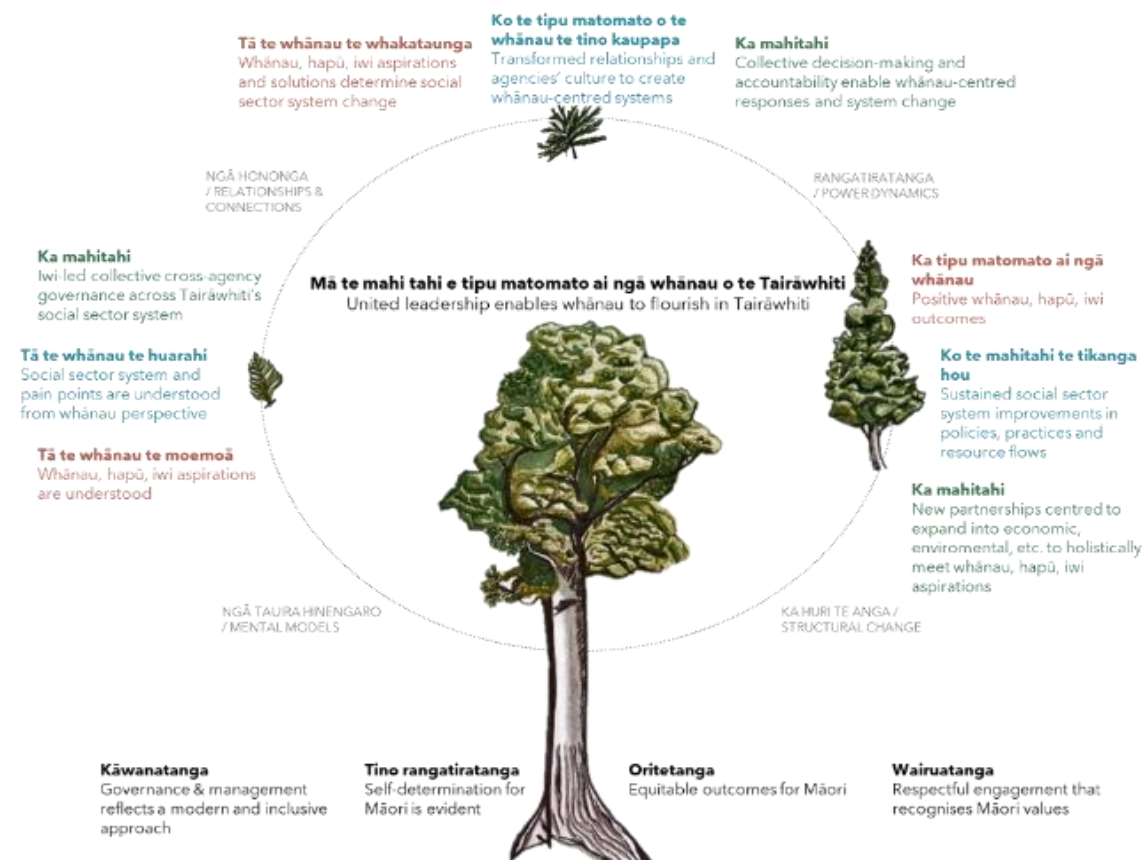
- measurably improving whānau outcomes, one generation change
- a social sector that is whānau driven, supportive, simple to navigate, connected, and successful
- social sector staff who reflect their community and are able to support whānau potential and aspirations
- governance is accountable and drives forward to self-determined service provision
- communication is valued and clear

- robust and mutually beneficial partnerships with stakeholders locally and nationally.

Manaaki Tairāwhiti has multi-layered governance and operational structure to foster collective action and local system change. The Manaaki Tairāwhiti Board (the Board) is co-chaired by Te Rūnanganui o Ngāti Porou and Te Rūnanganui o Tūranga-nui-a-Kiwa. The Board includes senior representation from Gisborne District Council, the Tairāwhiti District Health Board, regional managers from MSD, Te Puni Kōkiri, the Department of Corrections, Oranga Tamariki, New Zealand Police, Ministry of Education, Barnardos, and Tūranga Health. A practitioner group guides and supports operations of Manaaki Tairāwhiti. Te Rito or the Manaaki Tairāwhiti Hub is the regional backbone support for the PBI.

Figure 1 presents the model depicting the desired growth and evolution of Manaaki Tairāwhiti across time. The model uses the growth phases of kahikatea to demonstrate changes in governance, adoption of the Manaaki Tairāwhiti way of working, and whānau flourishing.

Figure 1: Manaaki Tairāwhiti success framework



Manaaki Tairāwhiti is a young kahikatea with relationships changing and new ways of working emerging

Given the growth stage, the case study focuses on the contribution of Manaaki Tairāwhiti to system changes that benefit whānau. We also discuss insights on challenges and opportunities to enhance social sector systems.

[INITIATIVE] is key to enable whānau to flourish

Background and overview

[included in this section: how the initiative demonstrates maturity stage progression at any of the levels (e.g., central government, PBI, whānau), initiative purpose, stakeholders involved and how, background, specifics on how the initiative demonstrates stage of PBI maturity]

Te Tiriti o Waitangi

[included in this section: how the PBI is giving effect to Te Tiriti o Waitangi and how the PBI is strengthening its relationship with Māori at all levels of the initiative]

Local system change and whānau outcomes

[included in this section: description of local system change/s using Kania et al's (2018) six conditions of system change as guidance, examples of system change, ongoing development, and next steps

And, description and example of how the system change benefits whānau, include whānau voice if possible]

Challenges

[include challenges identified in the system improvement work and barriers to system improvement]

Opportunities

[include opportunities identified through the system improvement work]

Recommendations

[include recommendations for the ongoing work of Manaaki Tairāwhiti, governance group and central government agencies]

Appendix

[include any relevant documents here, for example, Manaaki Tairāwhiti strategy, governance and management structure, additional documentation]

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