



Wai - Research

#tātou

ourselves • our whānau • our community
Navigating your way to a healthy lifestyle

Collective Impact Learnings

April 2015 - 2017

A Report Prepared for Te Pae Herenga o Tāmaki





MIHI

Me taipari whakarewa waka ngā whakaaro

Let us elevate our thoughts like a canoe upon a full tide

Kei aku whakatamarahi ki te rangi, kei aku whakateitei ki te whenua, tēnā koutou katoa.

E mihi ana ki a koutou kua whai wāhi mai ki tēnei haerenga, e whai nei kia puāwai tonu ō tātou whānau ināianeī, ā, haere ake nei. Ahakoa nō hea koutou, kua tae kotahi nei tātou ki tēnei taumata, ki te toha i ngā wheako me ngā mātauranga kua hua ake, kia māmā ake ai te whai a ngā whānau kia tutuki ai ō rātou moemoeā.

Ki a koutou kua huri ki tua o te ārai, koutou i para i tēnei huarahi, koutou i waiho mai i ō koutou kura mōhio, i ō koutou kura whakaaro hei ārahi i a mātou, e kore rawa koutou e warewaretia. Ka ora tonu koutou i roto i ngā tāhuhu kōrero i takoto i a koutou i mua, hei whai mā mātou ki tua. Okioki mai rā koutou, i ō uri e koke tonu nei, e takahi tonu nei i te ara i parahia e koutou.

Hoki rawa mai ki a tātou te pito ora. Ki ngā whānau o Waipareira, o Tāmaki ki te Uru, otirā, o Tāmaki Makaurau whānui, ā, tae atu hoki ki ngā iwi, ki ngā mātāwaka, ki ngā ratonga hauora, toko i te ora hoki e whakapau kaha nei hei painga mō ngā tini whānau, ahakoa kāore anō ā tātou mahi kia oti noa, he whiwhinga nui te mahi ngātahi ki a koutou, ā, e aronui ana mātou ki ngā hua o anamata.

Nō reira tēnā koutou, tēnā koutou, tēnā rā tātou katoa.



FOREWORD

Tēnā koutou katoa - Greetings everyone

It is our pleasure to provide this report of the initial learnings of our collective impact initiative. We have come together to be a catalyst for change for our whānau and our communities. Our aim is to have our whānau and our communities continue to shape the vision we have initiated.

Collective impact has provided us with a framework to consider the complexities of assisting whānau in their journey towards improved health and wellbeing. We have worked with our Partners in the Whānau Centre to utilise our combined resources to focus on whānau health literacy, and work with whānau who wish to lose weight and improve their health and wellbeing. We also expect change in our organisations, in their knowledge and understanding to understand each other's services and their abilities and readiness to collaborate and change to meet our community needs. On this journey, we continue to learn how resources can be better utilized to help whānau achieve their health and wellbeing aspirations. The development and implementation of #tātou, our navigation and support service for whānau, has become a recent focus of the collective Partners of the Whānau Centre, but it could not have happened without engagement from whānau.

This document reveals that there have been a range of challenging aspects over the past two years, yet from our perspective we have moved more towards active collectiveness and a more informed readiness to continue together.

Our journey is by no means complete, but through this document, we are sharing our learnings to date on behalf of the Whānau Centre Steering Committee, in the hope that others may benefit from this knowledge.

Ngā manaakitanga

nā

Whānau Centre Steering Committee

Kate Moodabe
East Tamaki
Health Care

Aroha Haggie
Funding – Auckland/Waitemata
District Health Boards

Karen Tuivaiti
Ministry of Social
Development

Angilla Perawiti
Te Whānau o Waipareira
Frontline Services

Lance Norman
Hāpai Te Hauora

Jo Nicholson
Backbone Services,
Te Whānau o Waipareira



CONTENTS

Executive Summary	1
Introduction	7
Methodology	8
Methods	8
Findings and Analysis	9
Background	10
Collective Impact Theory	10
Te Whānau o Waipareira – Lead Provider	11
Ngā Pou o Te Whare o Waipareira – Place-based Collective Impact	12
Te Pae Herenga o Tāmaki Regional CI Strategy	13
Funding for the Initiative	14
Phase One: Establishment	15
The Collective Action Plan	15
Summary of Phase One	20
Learnings from Phase One	21
Phase Two: Transition and #tātou: January 2016 – December 2016	22
Steering Committee Meeting Outcomes – 2016	22
Summary of Phase Two	29
Learnings from Phase Two	30
Phase Three: Ready and Together: January 2017 – April 2017	32
Summary	35
Learnings From Phase Three	36
Conclusion	37
Bibliography	39
Appendix One – Regional Collective Impact Structure	40
Appendix Two – Backbone and Partner Reflections	41



CONTENTS CONTINUED

Appendix Three – CI Learnings Tool	48
Appendix Four – CI changes to Conditions for Success	49
Glossary	50



QUOTES WHĀNAU CENTRE STEERING COMMITTEE



“The challenge is having to be open to the direction not being set by (my organisation) and really approach it as a true open partner”

– Aroha Haggie



“One good thing is how you could connect whanau in the building to different services”

– Lance Norman



“This is a really great platform to come in and say, how can we make a difference to our community? And what are you bringing to the table – so what is your organisation interested in doing?”

– Kate Moodabe



EXECUTIVE SUMMARY

Introduction

The purpose of this report is to share the learnings of the place-based Collective Impact (CI) initiative ‘Ngā Pou o te Whare o Waipareira’, established at the Whānau Centre in Henderson, Auckland. The Collective - also known as the Whānau Centre Collective Impact Initiative (WCCII) - has taken a Whānau Ora approach with whānau at the centre and established a navigation and support service called #tātou to support the WCCII’s Common Agenda. The Common Agenda for the initiative is based on the vision that ‘All whānau in West Auckland are healthy’ and a mission, ‘to improve health outcomes for whānau in West Auckland.’ Current objectives are:

1. To support whānau to achieve/maintain a healthy weight.
2. To improve collaboration and health literacy in the Whānau Centre.

The report is discussed in terms of three time periods, from April 2015 - April 2017, as this best represents the implementation phases and essentially what occurred;

1. **Phase One – Establishment**
April 2015 – December 2015
2. **Phase Two – Transition and #tātou**
January 2016 – December 2016
3. **Phase Three – Ready and Together: Future Focus**
January 2017 – April 2017

Background

In 2014, Te Pae Herenga o Tāmaki, a collective of Iwi, pan-tribal and Māori community health and social service providers, responded to an Expression of Interest (EOI) to implement CI. They proposed a ten-year dual strategy across the Auckland region. Te Whānau o Waipareira (TWOW) would take a ‘lead Provider’ role and set up a place-based local initiative in West Auckland in 2015 as well as Backbone Services, for a period of two years. The lessons from that initiative would inform the capacity building and understanding of CI amongst the other regional Partners who would subsequently set up their initiatives in the north, south and central regions of Auckland over the remaining years. Te Pae Herenga o Tāmaki was successful in receiving funding from Te Pou Matakana (TPM) the North Island Māori Commissioning Agency to undertake their programme of CI in 2015.

Collective Impact

Ngā Pou o Te Whare o Waipareira, utilises a CI methodology, which recognises that one organisation alone cannot create large scale change or address complex community issues in isolation of others. CI supports strong collaborations that work collectively to bring their resources in synergy with others to “move the needle” on a complex issue defined by those communities. At the beginning, all the partners in the initiative were new to implementing CI, therefore external consultancy support¹ was engaged to facilitate the Collective for Phase One until December 2015 followed by some mentoring of the new Project Manager from January 2016.

¹Social Ventures Australia were experienced in CI and engaged to facilitate from April 2015-December 2015.



EXECUTIVE SUMMARY CONTINUED

Whānau Ora

The 'Ngā Pou o Te Whare o Waipareira' initiative was based on a Whānau Ora holistic approach to well-being and achieving best outcomes for Māori². Whānau Ora is a key cross-government work programme, initially implemented by the Ministry of Health, Te Puni Kōkiri and the Ministry of Social Development. Te Pou Matakana commissions for Whānau Ora across the North Island.

Learnings

This report has identified learnings related to the establishment of the WCCII combined with its' first whānau initiative, #tātou. The journey reflects the start up nature of the Collective in the initial phases, while by the third phase there is a shift in learnings underpinned by an increased understanding of the expectations of CI.

The themes for the three phases of this report have been assigned to five categories: Whānau; Management; Backbone Services; Resourcing; and Culture of Collective Impact:

Learnings	Whānau
Whānau	<ol style="list-style-type: none">Engaging with whānau should be a priority when planning the Common Agenda, to ensure that time is spent productively planning for the whānau that will be impacted by the initiative. The Collective developed an initial action plan, but adjustment to the proposed model of change could not happen until whānau were engaged.Frontline workers are valuable sounding boards when brain storming about whānau needs provided there is a commitment to further adapt through whānau feedback. Taking this approach when developing the #tātou initiative, gave reasonably good information for early stage development and implementation.Early engagement of whānau is important to focus planning to be more whānau centric. Once whānau were identified and engaged, the Partners could see how they could participate, which in turn generated ideas and strengthened relationships.It is important to consider the authenticity of whānau participation. Presently #tātou whānau and Partner staff enrolled in #tātou provide that conduit, but the question arises whether that is sufficient when compared to the Conditions for success most recently offered for CI³ under Inclusive Community Engagement (Appendix Four).

²Whānau Ora Taskforce. (2010). *Whānau Ora: Report of the taskforce on Whānau-centred initiatives*.

³Cabaj, M. Weaver, L. 2015, *Collective Impact 3.0 An Evolving Framework for Community Change – From the Improbable to the Possible*.



EXECUTIVE SUMMARY CONTINUED

Learnings	Management
Management	<ol style="list-style-type: none">It is useful to agree on data requirements and data sharing arrangements early. Arranging data access between the Partners took longer than expected.Agreeing on a database will be a key consideration. Te Whānau o Waipareira had a comprehensive database for collection and analysis of data.It is important to allow enough time for all parties initially to regularly revisit and consolidate learning and understanding of CI theory. Time pressures at the beginning meant the CI process resulted in a proposed Plan being completed in eight months, but Partners were not necessarily ready or able to act on the Plan or participate fully in that time.Steering Committee members need mandates to act, as do their representatives. It was difficult to make decisions at steering group level when Partners were absent or representatives could not participate in decision-making, resulting in time delays or additional follow up from Project staff.It would have been useful for the Steering Committee to collectively scope the workstream projects. Spending time on scoping projects with all involved, is important to help set realistic timeframes. The work programme at the start of 2016 had not allowed for the developmental aspects of the workstreams resulting in resource gaps and slippage in milestone timeframes.It is helpful to have enough time and navigation support to access staff in Partner organisations for any CI research requests from the Steering Committee. Research staff experienced delays and complexities accessing Partner organisations to survey staff.A CI training package would be helpful for all new participants in the CI initiative to build capacity as soon as possible. Information about CI had to be sourced individually by participants.When starting up an initiative, participants should be prepared for a change environment. Backbone services staff worked in a fast changing environment and utilised a broad range of skills to carry out the work involved in the Action Plan.It would be useful to revisit the role of the Steering Committee because there was a sense that Steering Committee members were covering both strategic and operational matters initially. Engaging with more operational staff benefitted #tātou whānau because it strengthened engagement of frontline workers and access to new and existing services.



EXECUTIVE SUMMARY CONTINUED

Learnings	Management Continued
Management Continued	<ol style="list-style-type: none">10. It would be useful to have opportunities to talk specifically about roles and responsibilities. Some participants felt unsure about their place in the Collective and thought clarification would be beneficial.11. It is important to identify ways to share learnings early and regularly to check progress against agreed criteria and values. Once gathering learnings became more regular in the Collective, participants who did share, gave new and valuable information, for example, Partner perceptions of CI and Kaiārahi learnings about whānau (Appendix Two).12. CI can be challenging for managers. It requires new ways of thinking and doing as well as changing ideas about self.
Learnings	Backbone Services
Backbone Services	<ol style="list-style-type: none">1. Spend time improving literacy about CI implementation. Review not only literature about CI, but also include implementation considerations including the literature review provided together with this report.2. It is important to recognise when starting up, that not all Partners are ready or able to move forward collectively at the same time. The Project Manager found the need to spend a lot of time between Steering Committee meetings building relationships and knowledge with Partners.3. It is important to spend time on scoping the work required for projects and identifying cross organisational barriers before setting outcome milestone dates. More time was needed to implement the workstreams towards the Common Agenda because of differences in organisational operations between each of the Partners.4. Backbone services are useful to maintain the focus and momentum for CI. There were numerous occasions to demonstrate that work can be progressed in a focussed way without cross organisational barriers to navigate. A key example was the full development of the #tātou initiative under backbone services at a time when the Partners were still learning about CI and their roles.5. Learnings and whānau stories provide additional and useful indicators of change. These have been evidenced in dialogue with participants.



EXECUTIVE SUMMARY CONTINUED

Learnings	Resourcing
Resourcing	<ol style="list-style-type: none">1. External facilitation is useful for new practitioners to CI or where timeframes are tight. Having the help of SVA (Social Ventures Aotearoa) guided the Steering Committee to get a plan together quickly at a time they were still learning about CI.2. It would be optimal to have a data analyst as well as research expertise on the Steering Committee from the outset. A data analyst would have been helpful when setting the Action Plan indicators early on.3. It should be a priority to have a Project Manager at the beginning. It was found that there was a significant need for: building networks and relationships with the Partners and initiating a “learning culture”. Having to do this work later in the project took longer than expected and added to difficulties achieving milestones.4. It is important to identify capacity requirements for Backbone staff early and bring them in to the initiative at the beginning, if their work is needed to set the Common Agenda and project manage. It was difficult for Backbone staff to lend their expertise to key developmental aspects when they had already been set in the first Phase.5. The development of tools is a key consideration. Tools have been required to understand and measure changes against the Action Plan indicators throughout the project.6. It is important to be mindful of future considerations and the potential that directions may need to change quickly. Working in a funding environment for essentially a long-term approach such as CI requires strategic innovation.
Learnings	Culture of Collective Impact
Culture of Collective Impact	<ol style="list-style-type: none">1. It is important to look for tools and training which leverage on-going interest in the Collective and create quick wins. The use of story-telling had a powerful influence on mobilising the Partners to support #tātou when the first whānau story was presented and Partners were at a stage where they weren’t sure about the ways they could support whānau being recruited to #tātou.2. Building good working relationships at an operational level improves the momentum, but can take longer than anticipated. Once operational networks were built, there were more ideas generated.3. Be flexible and adaptable and prepared to make change quickly to keep the initiative on course.



EXECUTIVE SUMMARY CONTINUED

Backbone services have also sought opportunities to support the future and long term sustainability of the initiative through a range of activities which include building a business case for funding; networking with like-minded organisations through Social Value Aotearoa; increasing knowledge about social return on investment (SROI) methodologies; training frontline staff in the use of the database and language of Outcomes; adaptive leadership; and building a learning culture.

Ngā Pou o Te Whare o Waiparera Collective Impact initiative is in its third year. During this 2017 phase, there has been a time of consolidation, reflection and a review of progress to date. Positive ripple effects have been identified, but most importantly, there is now a strong sense of Partner collaboration and a readiness to move together collectively.

Mā ngā huruhuru ka rere te manu
With feathers the bird will fly



INTRODUCTION

The purpose of this report is to share the learnings of place-based Collective Impact (CI) initiative 'Ngā Pou o te Whare o Waipareira', established at the Whānau Centre in Henderson, Auckland. The Collective - also known as the Whānau Centre Collective Impact Initiative (WCCII) - has taken a Whānau Ora approach with whānau at the centre and established a navigation and support service called #tātou to support the Common Agenda. This report shares the learnings of the initiative over a two-year funding period from April 2015 to April 2017. The Common Agenda is based on the vision that 'All whānau in West Auckland are healthy', and a mission 'to improve health outcomes for whānau in West Auckland.' Current objectives are:

1. To support whānau to achieve/maintain a healthy weight
2. To improve collaboration and health literacy in the Whānau Centre

The report is discussed in terms of three time periods, from April 2015 - April 2017, as this best represents the implementation phases and essentially what occurred;

1. **Phase One – Establishment**
April 2015 – December 2015
2. **Phase Two – Transition and #tātou**
January 2016 – December 2016
3. **Phase Three – Ready and Together Future Focus**
January 2017 – April 2017

The report focuses primarily on the CI implementation journey and how the initiative has developed. It covers the start of the collaboration amongst the Whānau Centre providers to the establishment of #tātou, a new kaiārahi navigation and support service for whānau engaged with the initiative. It is envisaged that in time, the expansion and ripple effects will reach other whānau in the wider community and other communities will help create the momentum to "move the needle" on whānau health and wellbeing and reducing obesity.



METHODOLOGY

A mixed methods approach has been undertaken to gather learnings for this report. At the outset, the WCCII was focussed on developing the Action Plan but reportage did not evidence formal collection of learning outcomes in Phase One during 2015. This has meant that approaches to learning have evolved organically over the establishment of the initiative with momentum gathering in the latter half of 2016. At the end of 2016, the initiative arrived at a point where reflection became a useful tool to gauge the feelings of the Partners and Backbone staff.

Kaupapa Māori Research refers to an approach, framework or methodology for thinking about and undertaking research 'by Māori, for Māori'. Especially important to Kaupapa Māori research is that it's transformative and produces positive change. Another important aspect of Kaupapa Māori research is that it seeks to understand and represent Māori, as Māori. This includes a structural analysis of the historical, political, social and economic determinants (enablers and barriers) of Māori wellbeing (Cram, 2012). Consideration has been given to methodologies incorporating a kaupapa Māori approach and how they reflected within the overall CI initiative.

METHODS

Document Review

A document review was conducted with a particular focus on CI best practice and how the methodology was being applied in this initiative. Documents which clarified the context in which the initiative was funded were also reviewed for background purposes and an understanding of the environmental factors which influenced decision-making.

At an operational level, meeting documentation, progress reports and planning documents were also reviewed for emerging issues and alignment with CI best practice.

Literature

As part of this report, a literature review was undertaken in order to consider the role of CI and its application in Aotearoa. A brief political and historical context of relevant social and environmental factors unique to Aotearoa is provided. The review also examines dialogue between criticism and ongoing development of the framework in order to highlight salient insights into both its application and potential. Together with the learnings report, it is intended to provide a critical analysis, to challenge the thinking of those proposing to fund or implement Collective Impact and seeks to foster discussion and debate around emergent themes in the literature related to collective impact.

Qualitative Interviews

One-on-one and group semi-structured interviews were conducted with questions specifically asking about challenges and learnings related to roles, collective impact, emergent issues and anything respondents thought was useful to the discussion. Discussions were kept light. Quotes have been gathered for analysis (Appendix Two).



METHODOLOGY CONTINUED

Questionnaire

A tool was developed and distributed at the Steering Committee meeting in May 2016 and later revised after feedback in October 2016 (Appendix Three). Feedback using the tool has been included in the comments in Appendix Two. Work had commenced on a reflective tool at the end of 2016, however the opportunity to present and test it has not eventuated.

Observations at Meetings

All steering committee meetings were attended in 2016 along with planning discussions with Backbone services and incidental meetings with operational staff. Events are described to give a sense of the work flow and timing of events.

FINDINGS AND ANALYSIS

Observations, quotes and documents were synthesised with the report learnings. It was noted that documentation did include Maori frameworks particularly in the development of the #tātou initiative, whereby systems have built on frameworks utilised by Te Whānau o Waipareira.

It was difficult to specifically categorise the learnings to the conditions of CI identified in the Action Plan or to the new conditions identified by the Tamarack Institute in 2016⁴, although two categories were used from the latter framework (Appendix Four). This may have been due to the fact that some of the learnings are based on a start-up phase vis a vis an established initiative. The learnings themselves reflect many start-up learnings and considerations and often repeated themselves under varying circumstances. The categories chosen for the learnings are an attempt to provide a practical lens to the findings, but they are not mutually exclusive. For example, building a learning culture has implications across all categories. It should be remembered that the evolution of CI is not linear and it is difficult to assess at this point, the extent to which the timeframe pressures or knowledge limitations have impacted the course of events within the Collective, without further evaluation. Notwithstanding those limitations, the report has identified some fundamental learnings that experience has taught participants in the Collective and could improve practice or save valuable time and resource in other Collectives.

⁴Cabaj, M. Weaver, L. (2015). *Collective Impact 3.0 An Evolving Framework for Community Change – From the Improbable to the Possible*.



BACKGROUND COLLECTIVE IMPACT THEORY

Collective Impact is a methodology⁵ that has been used to address complex social issues, and for innovative social change at scale.

Potentially, CI offers a philosophy to address complex issues faced by whānau, with an emphasis on achieving large scale changes over time. In addition, it offers opportunities to explore ways to strengthen and improve whānau potential, and achieve their goals and aspirations. Te Whānau o Waipareira (TWOW), defined it as the commitment of a group of partners from different sectors to a common agenda for solving a complex social problem. In order to create lasting solutions to social problems on a bigger scale, organisations need to coordinate their efforts and work together around a clearly defined goal⁶.

Many aspects of CI present perspectives and concepts which are not too foreign to Māori Providers, therefore it is not surprising that this strategy is being tested within the New Zealand context.

CI theory has at its core, a number of conditions deemed by academics to be necessary, when establishing a Collective.⁷

- A **Common Agenda**, whereby collective partners work to address a complex issue affecting communities.
- **Mutually Reinforcing Activities** which various Partners work in synergy, towards achieving the Common Agenda.
- **Shared Measurement** systems to aid in the collection and analysis of data to ensure that actions being taken, are in fact making a difference in areas contributing to meeting the Common Agenda.
- **Backbone Services** to provide focus and support and carry out some of the work required by the Steering Committee.
- **Continuous Communication** to ensure all stakeholders are kept informed of progress and have an opportunity to participate in discussions.
- The WCCII have included '**Whānau Engagement**' as a sixth clause, ensuring that whānau are central to their CI focus.

⁵John Kania & Mark Kramer. (2011). *Collective Impact*, Stanford Social Innovation Review Winter 2011, Copyright © 2011 by Leland Stanford Jr. University All Rights Reserved.

⁶Te Whānau o Waipareira, 2 April, 2015 – Whānau Centre Collective Impact Invitation to First Meeting 2015.

⁷F. Hanleybrown, J. Kania, & M. Kramer, 2012 *Channeling Change: Making Collective Impact Work*, Stanford Social Innovation Review, ©2012 by Leland Stanford Jr. University.



BACKGROUND TE WHĀNAU O WAIPAREIRA – LEAD PROVIDER

Kokiritia i roto i te kotahitanga

Progressively act in unity

The above whakatauki epitomises the vision and to some extent the audacity of the original founders of Te Whānau o Waipareira Trust and highlights an indigenous thought process whereby collectiveness is valued and forward focussed. Established at a time of great change in the health and social service sectors in the mid-1980s, the Trust sought to utilise the collective efforts of the original trustees and whānau of West Auckland, to continue the momentum built by many of them in establishing the pan-tribal marae of Hoani Waititi in Glen Eden and then, the early growth of Kōhanga Reo, both significant actions in those times. Many brought their experiences of working with whānau in different settings to the table to achieve goals for their wider whānau and communities. These shifts were occurring across the region amongst iwi Māori and other pan-tribal entities. In the wider political environment, policy changes occurring in sectors such as health, education and social services created the opportunities. The needs amongst whānau were evident to the original founders and together another journey was initiated in the establishment of Te Whānau o Waipareira Trust as a pan-tribal Māori Urban Authority. The role of the Trust as Lead Provider of the first of four Auckland regional CI initiatives continues the legacy of its early and continued leadership to seek innovation and grow whānau capacity and resilience to meet their ever-changing needs.

Te Whānau o Waipareira Trust has grown and adapted its education, health, social and mental health services, progressively through listening to and building understanding of whānau needs and aspirations. Activities have occurred on many levels for this to happen and this work has not occurred in a vacuum without due consideration to the lessons to be learnt from others, all the while analysing through a kaupapa Māori lens. Astute leadership and understanding the wider environmental context in which services needed to be established have also been tantamount to achieving a scale of change able to impact for whānau in West Auckland and consequently across the country.

Whilst this Collective Impact story has its' roots in the key government policy platform of Whānau Ora, the genesis of Collective Impact could be argued to have begun many generations before through the intrinsically linked tribal constructs of whānau, hapu and iwi. Iwi Māori have over time, articulated their thoughts and beliefs through ongoing dialogue, advocacy and research about working with their own to improve long term outcomes. This has collectively and nationally informed the strategy of Whānau Ora⁸. The emergence of Collective Impact theory has also arisen from research associated with overseas initiatives where large-scale changes around complex issues have occurred⁹ and therefore provides an internationally applied methodology with the opportunity to be applied consistently across Aotearoa, offering potential benefits to all stakeholders.

The formal CI journey for the Trust evolved due in part to its activities as a Whānau Ora Provider but also as part of the wider political environment internationally, nationally and locally, advocating for indigenous rights and the rights of urban-based Māori.

⁸Whanau ora Taskforce.

⁹SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira – Final deliverable for October – December 2015 period Pg 21.



BACKGROUND

NGĀ POU O TE WHARE O WAIPAREIRA – PLACE-BASED COLLECTIVE IMPACT

WHĀNAU CENTRE, HENDERSON

The Whānau Centre is based in the Henderson retail area. Many health and social service providers including Te Whānau o Waipareira, deliver their services from these premises. These include General Practice (GP) services through East Tamaki Health Care (ETHC), Waitemata District Health Board (WDHB) secondary services, Smile Dental, Pharmacy, Physiotherapy, the Regional Māori Public Health Provider - Hāpai Te Hauora Tapui, Work and Income, Drake Recruitment Services, Acupuncture and Columbus Cafe amongst the range. It was with these services that the Trust hoped to work collectively, to address a complex issue facing whānau of West Auckland. At that time, the tenants provided services alongside rather than collectively with each other, but some had well-established relationships such as the Trust and WDHB. Ultimately, working collectively was not the norm.

Establishing a CI initiative within a two-year timeframe posed a real challenge for the Collective. The Providers, including Te Whānau o Waipareira, lacked previous experience implementing CI theory. In order to mitigate the challenging timeframes for CI implementation, Te Whānau o Waipareira sought to lead an incubator approach, a test-ground for implementation of CI. Taking a place-based approach to CI was the proposed strategy. The services of external consultancy support experienced in CI and outcomes planning was sought to accelerate learning and development of a CI Plan.

An Invitation to Kōrero

Te Whānau o Waipareira invited all tenants in the Whānau Centre to attend an initial hui on the 22nd April, 2015. The purpose of the hui was to discuss CI and talk about working collectively. Everyone had been provided with pre-reading material about CI prior to the meeting. Most of the tenants attended, but by the time of the second meeting the smallest providers were feeling they did not have the capacity to participate at ongoing meetings, but indicated their willingness to assist as the need arose.

After seeking assistance throughout Australasia, Te Whānau o Waipareira (TWOW) engaged an Australian consultancy company Social Ventures Australia (SVA) to facilitate the establishment of the Collective Impact (CI) initiative in conjunction with all tenants within the Whānau Centre in Henderson and the newly establishing Backbone Services at TWOW. SVA were familiar with CI methodology and their background could offer valuable experience and guidance to the initiative. SVA were engaged for Phase One to help the initiative produce a plan for CI. The attendees at the meeting also met representatives of SVA.

An early Steering Committee of five partners was established: Te Whānau o Waipareira, East Tamaki Healthcare, Work and Income, Hāpai Te Hauora and Waitemata DHB. External facilitation from SVA for both the Steering Committee and the newly established Backbone Services, allowed the facilitated development of a plan over a period of eight months.



BACKGROUND

TE PAE HERENGA O TĀMAKI REGIONAL CI STRATEGY

Te Whānau o Waipareira undertook to engage with like-minded partners across the Tāmaki Makaurau (Auckland) region with the view to submitting an Expression of Interest (EOI) to Te Pou Matakana to be part of the Collective Impact Commissioning. A joint relationship and overarching group **Te Pae Herenga o Tāmaki** developed amongst iwi and pan-tribal organisations, convened a CI cohort of Providers across Tāmaki Makaurau.

Te Pae Herenga o Tāmaki represents the following Partners:

- **Ngāti Whātua ki Ōrākei** – Central Auckland
- **Te Runanga o Ngāti Whātua** – Lower Te Tai Tokerau (North Auckland)
- **Te Whānau o Waipareira Trust** – West Auckland
- **MUMA Manukau Urban Māori Authority** – South Auckland
- **Kotahitanga Collective (Papaura Marae, Te Kaha o Te Rangatahi, Turuki Health Care)** – South Auckland
- **Te Puna Hauora** – North Shore

The partners work at all levels of health and social services and focus on developing and implementing innovative ways to work better together. The ultimate goal through collective impact is to measure outcomes achieved for Māori across Tāmaki Makaurau. A significant historical milestone for Māori across Tāmaki Makaurau, it is the first time Iwi, Urban Māori and Māori providers have come together in a comprehensive way to build capacity to work towards delivering a regional ‘for Māori by Māori to Māori’ kaupapa. The success of the EOI lead to a CI funding contract for the first stage in early 2015.

The group developed a ten year Regional Strategy. They all lacked experience working with collective impact, therefore the approach taken was to build their understanding of CI, share learnings and roll the strategy out across the Auckland region over ten years.

The regional CI approach became known in the group as Te Kāhui Ora o Tāmaki. The collective impact capacity of each regional partner would be built to enable them to lead collective impact initiatives in their own regions (Appendix One) over time and on a staggered basis. It would be achieved through capacity building forums, data management and analysis training, and learnings from the pilot initiative in West Auckland.

The group agreed that Te Whānau o Waipareira would be the first to receive funding as a Lead Provider to set up Backbone services and a place-based initiative in West Auckland for two years until June 2017. Their shared learnings would inform the wider Regional Collective. It was further agreed that the Whānau Centre initiative should seek its own funding to continue after that time. Current TPM funding would then pass to other Regional providers to establish initiatives in another region of Tāmaki Makaurau.



BACKGROUND

FUNDING FOR THE INITIATIVE

Despite overseas examples of success, the funding situation in New Zealand is quite different and lacks the strong philanthropic base on which earlier overseas initiatives have been funded¹⁰.

Te Puni Kōkiri (Ministry of Māori Development) was initially tasked by the government through the Whānau Ora Taskforce Committee to roll out the establishment of Whānau Ora Collectives across Aotearoa¹¹. In 2014, commissioning for Whānau Ora passed to two Maori commissioning agencies – Te Pou Matakana for Te Ika a Māui (North Island), Te Pūtahitanga for Te Waipounamu (South Island) and one Pacific Agency, Pacific Futures.

This CI strategy is one of three commissioning programmes for Te Pou Matakana (TPM)¹². It continues integration of the key Government policy platform of Whānau Ora across Aotearoa, and is overseen by Te Puni Kōkiri.

Whānau Ora is an holistic approach to well-being aimed at achieving best outcomes for Māori¹³. It is a key cross-government work programme, jointly implemented by the Ministry of Health, Te Puni Kōkiri and the Ministry of Social Development.

Collective Impact is a natural progression in the continuing journey that the National strategy of Whānau Ora proposed. It is a recognised methodology for innovative, large-scale social change for whānau. This was not about developing programmes that might make a small difference to some whānau but more about creating major change.

Nā tō rourou, nā taku rourou, ka ora ai te iwi
With your basket and mine, the people will flourish

¹⁰Whānau House Collective Impact Initiative, April 2015, A pre-reading pack for the partners of Ngā Pou o Te Whare o Waipareira.

¹¹Whānau Ora Taskforce. (2010). *Whānau Ora: Report of the taskforce on Whānau-centred initiatives*.

¹²Te Pou Matakana Outcomes Roadmap 2016.

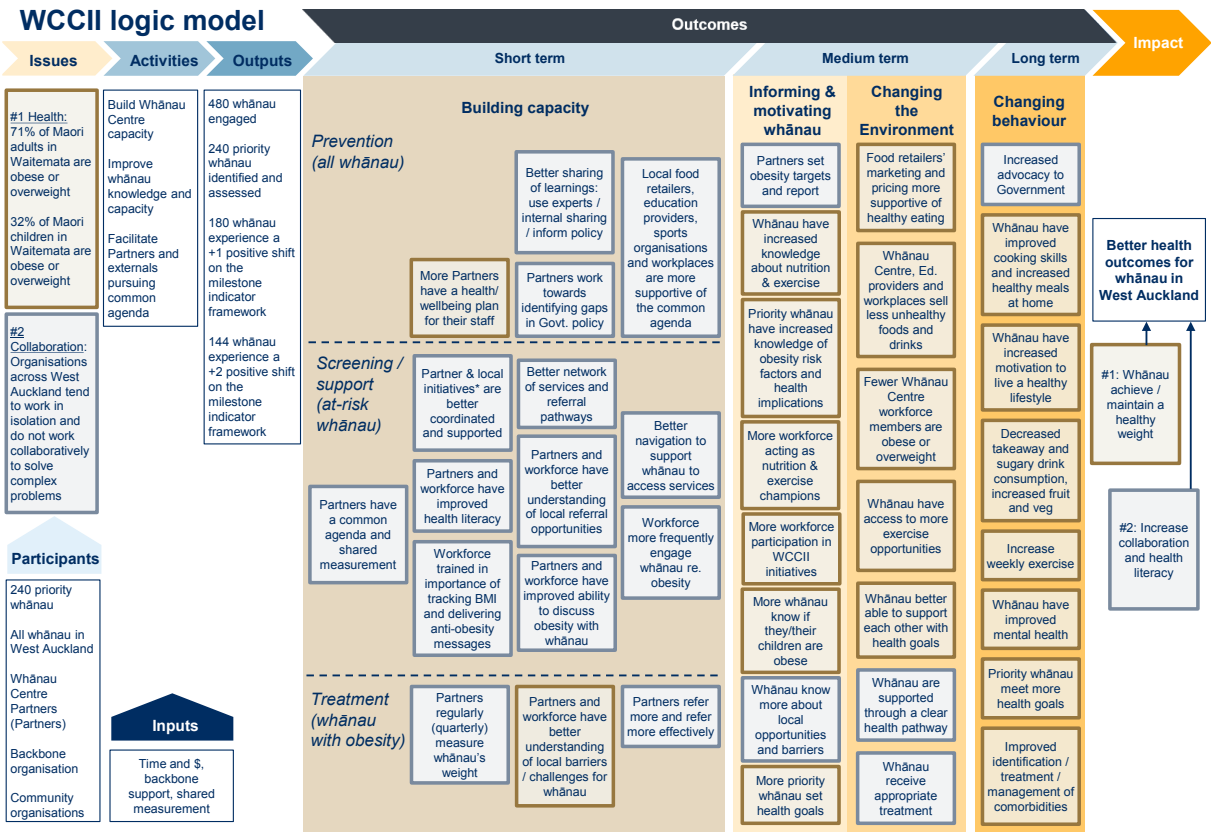
¹³Whānau Ora Taskforce. (2010). *Whānau Ora: Report of the taskforce on Whānau-centred initiatives*.



PHASE ONE: ESTABLISHMENT

THE COLLECTIVE ACTION PLAN

In total, five collective meetings were held prior to the end of the 2015 year. SVA then produced a substantive Progress Summary Report, which included references to overseas CI initiatives, progress timelines and achievements to show the journey since the first meeting, data which helped frame the Common Agenda, a logic model Action Plan with proposed outcomes and indicators, completed and proposed baseline surveys, proposed workgroups to achieve some of the outcomes and a work programme to achieve 17 priority outcomes in the first six months of 2016. At this stage there was no identified and engaged whānau base.



¹⁴SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira – Final deliverable for October – December 2015 period.



PHASE ONE: ESTABLISHMENT THE COLLECTIVE ACTION PLAN

The following Vision, Mission and Objectives were developed to support the Common Agenda.

Vision:

‘All whānau in West Auckland are healthy.’

Mission:

‘To improve health outcomes for whānau in West Auckland.’

CURRENT OBJECTIVES

To support whānau to achieve/maintain a healthy weight (By June 2017)

- Priority whānau will know their obesity status
- More whānau will lead healthy lifestyles
- Whānau will exercise more
- Whānau will eat unhealthy food less
- The Whānau Centre workforce will regularly talk to whānau about healthy lifestyles/nutrition/exercise/obesity.

To improve collaboration and health literacy in the Whānau Centre (By June 2017)

- There will be a significant increase in the referral rate between services in the Whānau Centre and from the Whānau Centre to external agencies
- Whānau Centre Partners will have created an environment that reduces health literacy demands.

The main conditions identified by Ngā Pou o Te Whare o Waipareira¹⁵ in Year one were largely based on recognised best practice conditions for CI at that time namely:

- Common Agenda
- Backbone Support
- Mutually reinforcing activities
- Shared measurement
- Continuous communications.

Apart from those five standard CI conditions, an additional condition was included, which was ‘Whānau Engagement’.

¹⁵SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira – Final deliverable for October – December 2015 period.



PHASE ONE: ESTABLISHMENT THE COLLECTIVE ACTION PLAN

Common Agenda

The literature about CI indicates it can take several months in general to agree on a common agenda. For the Whānau Centre initiative, considerable progress was made, so that at the second meeting an agreement was reached amongst the Partners to target health and health literacy to be a part of the Common Agenda. Public and readily available data was reviewed. Obesity was prioritised at the 4th meeting in November 2015 and agreement occurred amongst the Partners that the Common Agenda would focus on obesity and improved whānau understanding (health literacy).

The 5th and final meeting in December 2015 resulted in refinement of the logic model and criteria for priority whānau to be recruited through TWOW with the data team analysing whānau data.

A series of surveys were proposed to support the Common Agenda and gather baseline data about whānau health needs and health literacy, Partner understanding of services available in the Whānau Centre and later, a health literacy pre-training survey amongst staff.

The findings of the first survey undertaken with whānau towards the end of 2015¹⁶ and reported in February 2016, did not explicitly support the notion of health literacy. A review of the findings of the survey, showed high levels of self-reported health literacy amongst the whānau interviewed, but when critically reviewed, the results seemed to indicate that other factors influenced the data, and highlighted a desire by the survey participants to ‘say the right thing’. In Phase Two of the CI development, in 2016 when some whānau underwent health literacy training, lower levels of health literacy were identified amongst participants.

Mutually Reinforcing Activities

Four working groups from within the steering committee were proposed to undertake work to achieve long term outcomes:

- **Whānau Navigation**
Selection and engagement of 240 priority whānau with navigators to develop a network of services and support for whānau to achieve their goals.
- **Whānau Centre Workforce Training**
Training staff about obesity, nutrition, exercise and health literacy so staff can engage whānau around the Common Agenda.
- **Whānau Centre Integration**
Development of service maps for staff to improve referral pathways and Partner knowledge of available services; service maps for whānau and eventually a community-wide service map for aligned health and well-being services.
- **Whānau Centre Health and Wellbeing**
The development of health and well-being plans for staff, nutrition guides for the Whānau Centre and creating health champions.

¹⁶Wai-Research, February, 2016, Ngā Pou o Te Whare o Waipareira “Understanding Your Health Needs” Survey Findings.



PHASE ONE: ESTABLISHMENT THE COLLECTIVE ACTION PLAN

Backbone Support

The initial establishment of backbone services and a drive to recruit the required staff and capacity to provide the necessary support to the Steering Committee was commenced in Phase One.

It was determined that co-ordination would be required once SVA completed their contract, so a senior co-ordinator was recruited from within TWOW with expertise in education and broad knowledge of the Trust's health and social services. This position was timed to commence at the beginning of Phase Two at the start of 2016. One Kaiārahi was also to be recruited for 2016 to help support 240 whānau and assist in their recruitment, as well as build a network of support services.

In regards to the research that was to accompany the CI initiative, new staff capacity was also required. Two more baseline surveys required planning and implementation for the start of 2016 and work was still needed to understand what data would need to be captured for the logic model indicators and outcomes. Working with whānau during the first survey in Phase One, was an opportunity to introduce them to researchers from the Whānau Centre and improve relationships across the Partners and whānau alike.

Backbone services were also required to lead out the Whānau Navigation workstream for whānau in 2016.

By the end of 2015, recruitment of backbone staff, namely the coordinator, kaiārahi to engage with whānau and the research staff was occurring.

Shared measurement

In 2015, SVA worked with the Collective to identify priority outcomes in the Action Plan. Indicators were then proposed to meet the outcomes, but not agreed on by the end of Phase One. Some early initial agreements about sharing data of whānau who might benefit from engagement with the initiative were sought, but those agreements did not eventuate until late in 2016, after establishment of #tātou. Backbone services had instead taken the view that if the problem of obesity was seen as significant, then they could assume that whānau could be recruited by other means. Once whānau were engaged, there would be better opportunities to measure the changes sought in the Action Plan.

Continuous communication

The focus in Year One was mainly on communication between the Steering Committee and SVA, however the Service Integration workstream proposed that the remaining Partners in the Whānau Centre be engaged with and updated about the Common Agenda in Phase Two at the beginning of 2016. SVA sought feedback from Partners during 2015 about how they felt about progress. Feedback appeared positive, with a recognition that “working together could achieve more¹⁷.”

¹⁷SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – *Ngā Pou o Te Whare o Waipareira* – Final deliverable for October – December 2015 period Pg 56.



PHASE ONE: ESTABLISHMENT THE COLLECTIVE ACTION PLAN

Whānau engagement

Whilst not a standard condition of collective impact in general, whānau engagement remains central to the philosophies of Whānau Ora¹⁸ and that of TWOW¹⁹. Not only does it fit with the policy of Whānau Ora, but given the intention and focus on whānau, it is consistent with kaupapa Māori literature about the central role of whānau²⁰.

¹⁸Te Puni Kōkiri, Whānau Ora Annual Summary Report 1 July 2014 – 30 June 2015.

¹⁹Te Whānau o Waipareira Annual Report 2015-2016.

²⁰Dr Leonie Pihama and Ms Mera Penehira, August 23, 2005 International Research Institute The University of Auckland: Building Baseline Data on Māori, Whānau Development and Māori Realising Their Potential Literature Review: Facilitating Engagement Final Report, Auckland Uniservices Ltd, Auckland – Prepared for Te Puni Kōkiri.



PHASE ONE: ESTABLISHMENT SUMMARY OF PHASE ONE

The Summary Progress report provided by SVA at the end of first phase²¹ demonstrated a pressured and complex process was undertaken by the Partners in a very short space of time across five meetings. The amount of work undertaken by all parties in Phase One was depicted with an emphasis on detailing a CI plan. The report for December 2015, gave a graphic representation of progress across all the conditions identified for collective impact and showed that progress for the Common Agenda was 75% complete, Backbone support, Mutually reinforcing activities and continuous communication 50% complete and shared measurement and whānau engagement 25% complete²². A September 2015 report showed that slippage in timeframes was already occurring²³ which gave some indication that planning was possibly moving in advance of the collective capacity to deliver on outcomes. With these former figures in mind and the latter information, it was difficult to see how the proposed work programme, focussing on 17 priority indicators, with intended completion within the first six months of Phase Two, could be achieved. Whānau engagement still needed to occur and would logically take time, key backbone staff needed time to commence work and integrate into the initiative and work groups had largely not started their planning activities for workstreams, therefore requiring significant Partner input and organisational response.

Essentially, the report provided by SVA at the end of 2015 was comprehensive, developed with best practice for CI in mind and provided a plan for both the backbone services and the Steering Committee to follow at the start of 2016, while they came to grips with their responsibilities.

A review of the report timeline²⁴ would suggest that a lot of work was done on behalf of the Partners when the outcomes of meetings are reported but asking the Partners to deliver without time and discussion given to their own organisational demands, had an impact in the next Phase.

Learning about outcomes

“The evolutionary part of the data – what we really wanted as a Collective to help form the picture for us in terms of were we achieving the outcomes we’d actually set?”

²¹SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira – Final deliverable for October – December 2015 period.

²²Ibid pg 4.

²³150924 CI Steering Committee Powerpoint Report – Internal Report.

²⁴SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira – Final deliverable for October – December 2015 period pg 6.



PHASE ONE: ESTABLISHMENT LEARNINGS FROM PHASE ONE

Whānau

1. Engaging with whānau should be a priority when planning the Common Agenda, to ensure that time is spent productively planning for the whānau that will be impacted by the initiative. The Collective developed an initial action plan, but adjustment to the proposed model of change could not happen until whānau were engaged.

Management

2. It is useful to agree on data requirements and data sharing arrangements early. Arranging data access between the Partners took longer than expected.
3. Agreeing on a database will be a key consideration. Te Whānau o Waipareira had a comprehensive database for collection and analysis of data.
4. It is important to allow enough time for all parties initially to regularly revisit and consolidate learning and understanding of CI theory. Time pressures at the beginning meant the CI process resulted in a proposed Plan being completed in eight months, but Partners were not necessarily ready or able to act on the Plan or participate fully in that time.

Backbone Services

5. Spend time improving literacy about CI implementation. Review not only literature about CI, but also include implementation considerations including the literature review provided together with this report.

Resourcing

6. External facilitation is useful for new practitioners to CI or where timeframes are tight. Having the help of SVA guided the Steering Committee to get a plan together quickly at a time they were still learning about CI.



PHASE TWO: TRANSITION AND #TĀTOU: JANUARY 2016 – DECEMBER 2016

Phase two for the Steering Committee saw the introduction of a new Backbone staff. These included a Project Manager to take over from SVA, a kaiārahi to work with the Whānau Engagement workstream and one researcher to attend to the baseline research and gathering learnings.

At that point, the main documented point of reference for new backbone staff (also inexperienced in working in CI) to familiarise themselves with the initiative, was the Summary Report provided by SVA at the end of 2015²⁵, as there was not a comprehensive or collective induction for new staff or participants to CI.

Steering Committee Meeting Outcomes – 2016

Meeting Date	Key Outcomes
17 th February, 2016	<ul style="list-style-type: none">The key outcome was to ensure workstream leads were supported to initiate or progress their workstreams identified in the previous Phase²⁶. The priority was to engage with whānau through the Whānau Navigation workstream.Presentation of the finalised report for the first baseline survey with 480 whānau²⁷ about their health needs and health literacy.A proposed methodology presented for the second baseline study about Partner services and referral practices²⁸
30 th March, 2016	<ul style="list-style-type: none">WDHB took over full planning for the Workforce Training workstream which included health literacy training for staff, whānau and the third baseline survey to understand health literacy needs amongst Partner staffConcepts were accepted for a whānau navigation and support service called #tātou.Hapai presented the first draft of Service mapping across the Partners
11 th May, 2016	<ul style="list-style-type: none">Whānau story presentation creates “light-bulb” moments for the Steering Committee Partners to locate themselves in the journey of #tātou whānau and create interest in how to better use their resourcesETHC bought their health coach and proposed psychologist servicesDifficulties for the Service Integration workstream receiving feedback from Partners to check accuracy of service data for their respective organisationsThe research team presented the findings of the second baseline study about Partner services and referral practices²⁹.A Learning tool (Appendix Three) was circulated for learnings feedback from the Partners and Backbone staff.

²⁵SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira – Final deliverable for October – December 2015 period.

²⁶ibid.

²⁷Wai-Research, February, 2016, Ngā Pou o Te Whare o Waipareira “Understanding Your Health Needs” Survey Findings.

²⁸Wai-Research, May 2016, Ngā Pou o Te Whare o Waipareira – The Whānau Centre Collective Impact Initiative – A Report about the Baseline Partner Survey “Staff understanding of Services and Referral Practices”.

²⁹Wai-Research, May 2016, Ngā Pou o Te Whare o Waipareira – The Whānau Centre Collective Impact Initiative – A Report about the Baseline Partner Survey “Staff understanding of Services and Referral Practices”.



PHASE TWO: TRANSITION AND #TĀTOU: JANUARY 2016 – DECEMBER 2016

Meeting Date	Key Outcomes
15 th June, 2016	<ul style="list-style-type: none">Focus on recruiting the final whānau to #tātou and associated activities.
10 th August, 2016	<ul style="list-style-type: none">53 whānau had had health literacy training.Focus on reset for the initiative to use #tātou as the vehicle for CIPresentation of first review of outcome and indicator framework for the initiative.Feedback from the Learning tool.
19 th October, 2016	<ul style="list-style-type: none">Presentation by Research about the importance of having a learning framework and culture.Discussions highlighted that all Partners had a learning journey to share.Kaiārahi updates indicate a desire to engage with some of the smaller services in the Whānau Centre to improve relationships and seek new opportunities for engagement.Focus on improving analysis of data to guide decision making.
30 th November, 2016	<ul style="list-style-type: none">Reflection exercise built in to start of meeting, another strategy to build a learning culture.More initiatives are signalled from the Partners including the offering of training by Work and Income for kaimahi.

After the first meeting, Backbone staff knew the initiative was under time and contracting pressure and sought to push on with the workgroup activities. New Backbone staff were following the Action Plan from the previous year³⁰. The priority was to develop the Whānau Navigation workstream to recruit and engage whānau. This was important to enable testing of the Action Plan for the Collective.

Backbone services undertook to have meetings individually with members of the steering group to help build relationships and offer support with their workstreams.

The Whānau Navigation workstream was also the responsibility of Backbone Services. Many facets needed consideration, including workflow, registration, assessment, branding and key messaging to develop the start-up services that would support whānau. Further planning was undertaken to develop a service concept with draft assessment tools, process flows, whānau resources and training for the kaiārahi.

In an effort to develop a whānau friendly approach, a collaborative effort of backbone kaimahi and kaiārahi resulted in brainstorming exercises to plan a journey that this CI initiative’s whānau would be going on. What was useful here was that a number of people who were helping brainstorm this were also people who had experienced or begun their own journey towards health and wellbeing.

³⁰SVA Consulting, 22/12/2015, Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira – Final deliverable for October – December 2015 period.



PHASE TWO: TRANSITION AND #TĀTOU: JANUARY 2016 – DECEMBER 2016

The key software platform which would be used was that used by TWOW called Whānau Tahi V3. Training was identified to assist kaiārahi in their new role including data entry to the database as whānau were recruited.

There were unexpected complexities carrying out the Partner staff survey, resulting in time delays. Partner staff were needed to be informed about the CI initiative, the purpose of the research, and they needed to have access to computers or cell phones to answer the survey. The researcher was also reliant on a key contact person to identify appropriate staff for the survey and distribute the survey to their staff emails or cell phones. In addition, it wasn't timely for some Partner staff to participate because of other demands on their time. The survey process was most successful with those providers that had stronger relationships with Backbone services and understood what the CI initiative was trying to achieve.

By the end of the second meeting, relationships were becoming more established. Some Steering group Partners however, when not available, sent other representatives, who were not always able to commit to actions in a timely way. The actual complexities of undertaking the workstream projects were being felt by the Partners and Backbone services.

The work plan also assumed that whānau would be engaged when Phase Two started in January 2016. This was because earlier discussions in Phase One had focussed on identifying priority whānau through Partner databases and to support that, a data sharing agreement was proposed. By 2016, the complexities of sharing data had not been addressed. Alternative strategies were used to engage with whānau who would be interested in joining the initiative. Methods used by Backbone services were to also engage with staff in the Whānau Centre to join and use their networks to encourage community whānau to join. Social media avenues through Facebook, text, email and community events became useful tools to engage whānau. The initiative was facing a 30 June deadline to recruit 240 whānau who would then remain with the kaiārahi for a two-year support period. Backbone staff had gained another member to assist with the #tātou development and presentations to other services within Whānau House. These sessions were used to constantly refine referral pathways and tools to make it as easy as possible to get whānau to enrol. Once the agreed number of whānau were recruited there would be no new enrolments, as the aim of the initiative was to monitor agreed indicators and outcomes for enrolled whānau for two years.

In developing tools for the #tātou initiative, a decision was made to build on TWOW kaupapa Māori frameworks, as a way of seamlessly integrating with the Whānau Tahi database used for kaimahi in TWOW. In terms of being able to integrate #tātou with kaimahi services over time, this offered a practical way to interface the initiative with other kaimahi services so that #tātou activities could integrate with other services whānau might access.

With the increasing workload generated by the enrolment of whānau, including start up planning and development work for the initiative, training of staff and whānau, meetings and initial assessments with whānau another kaiārahi was recruited. The enthusiasm of kaiārahi for the role was crucial to maintain the interest of whānau and strengthen whānau engagement.



PHASE TWO: TRANSITION AND #TĀTOU: JANUARY 2016 – DECEMBER 2016

Initial leverage points had been identified to strengthen Partner networks and find opportunities for presentations about #tātou, and networking. Amongst the latter was the re-instigation of Ground Zero lunches occasionally for staff in Whānau House to network. This proved useful for key contacts such as the Dietician from WDHB, doctors from ETHC and community nurses from Waipareira services. In essence, these gave "quick wins". Having access to Partner operational staff was useful. They in turn encouraged their whānau clients to make contact with Kaiārahi for #tātou.

Whānau Story

Using story-telling as a strategy at the third meeting of the year was another "quick win" to help the Partners understand how they could utilise their services to help #tātou whānau on their journeys. A whānau participant, shared their story. It told of struggles with food and exercise and showed evidence of the same in their whānau. There was acknowledgement of another generation to consider in their role as aunty. Moreover, she now had a whānau that were willing to join the #tātou journey alongside her.

The challenges faced by the Service Integration workstream in mapping Partner services, highlighted over 200 types of service across the Whānau Centre, some of them not fully documented. Demonstrating pathways and connectivity to other Partners were also challenges. The findings of the second baseline study about Whānau Centre services and staff referral practices³¹ also showed a wide range of services amongst survey participants but lack of knowledge about how they connected. At some point, these pathways would need to be teased out but at that time it clearly wasn't a priority for the other Partners as they developed their own workstreams or whilst engaging whānau to the initiative, was the priority.

The previous few months had been used by backbone services to build relationships at all levels in the Whānau Centre to engage staff and wider community whānau in #tātou. By the fourth meeting on the 15th June 2016, momentum was building for the Whānau Navigation workstream. Service presentations about how #tātou worked and the use of social media were the norm. Staff health initiatives were appearing and wider community interest had also increased from Providers and whānau alike. Many ideas were being generated by the possibilities that providers could see, to support whānau utilising their services.

By the end of June 2016, 286 priority whānau had been registered. A small buffer of 46 whānau were retained to allow for whānau who left the initiative before two years was up. The focus at this stage was still on the Plan from the 1st Phase and the logic model outcomes and indicators, but as whānau enrolled, the focus changed to question what could be learnt from these whānau and their aspirations for wellness. This led Backbone services to discuss a review of the original logic model outcomes and indicators.

Backbone services also needed to plan for longer term sustainability of the CI initiative. Work was initiated to consider development of a business case to the District Health Board to ensure whānau being enrolled were supported for the full two years of the #tātou commitment and beyond if possible. In addition, networks were being built with other external parties that might support CI activities.

³¹Wai-Research, May 2016, Ngā Pou o Te Whare o Waipareira – The Whānau Centre Collective Impact Initiative – A Report about the Baseline Partner Survey "Staff understanding of Services and Referral Practices".



PHASE TWO: TRANSITION AND #TĀTOU: JANUARY 2016 – DECEMBER 2016

Despite all the activities underway, backbone services was the nexus of instigating a focus for the Collective by taking the lead and engaging whānau and using TWOW service staff to assist. It was hoped that the enrolment of whānau to the initiative and the activities being generated to support them, would create greater opportunities for the other Partners to participate. Partners were still building relationships and managing their workstreams.

By the time of the next meeting on the 10th August, the focus was on a reset for the Collective. A raft of on-the-ground initiatives were occurring amongst the Partners to support whānau on their #tātou journeys. Staff health literacy training was planned and whānau training workshops had been held in July.

On Innovation

*“... People can talk about new and innovative ways of working very easily
but the practice of it often turns out a lot harder and more challenging than they estimated”*

A third kaiārahi had now started to help manage the large case loading for #tātou. The CI focus had moved to profile whānau through gathering all baseline data including completed snapshots, health literacy assessment, clinical assessments and general whānau situation for all engaged whānau. Visual snapshot information was presented back about the first 75 completed whānau assessments. This generated further discussion amongst the Partners about appropriate data to gather and report against indicators. Through this process, and in much the same way that story-telling had an impact, the Partners were able to see the opportunity to have data applied to more tangible scenarios based on whānau experience, rather than the grey planning of earlier months.

The kaiārahi reports at these meetings and on-going social media updates gave the Steering Committee a real sense of how whānau were responding to the new #tātou navigation and support service from those working directly with them.

Feedback from the other workstreams indicated that they were at varying stages of managing their workstreams but focussed on how those initiatives connected more practically to #tātou whānau.

The first review of the outcome and indicator framework by the research data analysts, signalled the need to refine the original logic model and Common Agenda as more whānau specific data became available.



**“Have someone to manage
data integrity from day one”**
– Data and Research Group



PHASE TWO: TRANSITION AND #TĀTOU: JANUARY 2016 – DECEMBER 2016

Learnings discussed at the meeting encouraged further discussion and a recognition that it should include the negatives. Indicator reports were suggested for every meeting to monitor progress. So overall, a shift in Partner thinking has been occurring, whereby the conditions of CI identified in the first Phase of their initiative are now being applied with whānau at the centre. The Partners are seeking to use the data more effectively for decision-making and development of the initiative.

At the October meeting, the research team reviewed their journey with the Collective, noting that while the research activities had not been formally incorporated in the original project plan, their assistance had been required throughout. Earlier research assumptions about Partners being responsible for developing and driving the research were proved incorrect, resulting in research needing greater clarity about their role in CI and what the Partners wanted to achieve. Research saw itself in the role of ‘critical friend taking an objective view of the CI process and journey’³².

The meeting outcomes highlighted that all parties had a learning journey to share and they were also seeking ways to create better transparency for others, to improve analysis to guide decision making, that whānau were the key to actions taken and that steps could be taken to encourage other Whānau House partners on the journey. More specifically, greater sharing and a focus on continuing forward was the mantra for all.

The Kaiārahi role had shown a significant shift from the beginning of the year from a pressured development and recruitment focus, to one concerned about the appropriateness of the enrolment process and whānau needs.

Adjusting to change

“Disrupting the norm”

At the final Steering Committee meeting of the year on the 30th of November, there was a renewed vigour, a growing sense of collectiveness amongst the Partners, #tātou staff and backbone staff and a willingness to share their thoughts as learnings. The meeting started with a reflective and visioning exercise by the coordinator to gain feedback from the meeting participants about:

- Their vision for CI
- Their learnings from CI

There were a variety of responses but they were primarily focussed on whānau health, wellbeing and knowledge acquisition and understanding; working collaboratively with the range of skills and talent available to the Collective; thinking about the range of services available and how to extend knowledge about these to #tātou whānau. This exercise set the tone for the meeting, creating a positive vibe and sense of excitement going forward. The project coordinator was encouraged to continue opening the meetings in this way.

³²Collective Impact Steering Group Meeting 19th October, 2016 – Internal Report



PHASE TWO: TRANSITION AND #TĀTOU: JANUARY 2016 – DECEMBER 2016

Kaiārahi and Partner updates indicate that more and more staff from Whānau House services wish to participate and strengthen processes for #tātou whānau. Regular joint frontline (operational) meetings were signalled to start in December 2016 between Tātou staff, ETHC and Waipareira Services and thought was also being given to who else to include. In addition, Work and Income were planning to offer kaimahi training in the New Year about services available to whānau.

Service Integration remained a challenging area but work was progressing as and when the Partners could respond.

The research team were continuing to work closely with the data team, building a better understanding of outcomes measurement and relevant indicators to apply in the monitoring of the framework for #tātou. At the end of 2016, this area of data collection, management and analysis was still a grey area for the CI initiative requiring further capacity development and understanding in backbone services.

Overall, there was a future focus. The conditions of CI could now be applied to #tātou with a range of Partners willing and ready to act.



"I understand CI now. Tātōu is a small portion of the bigger picture but still an important part. So it's been about whānau, partners and data" – Kaiārahi group



PHASE TWO: SUMMARY OF PHASE TWO

The start of Phase two came with new backbone staff, coordination and an action plan developed in 2015. Backbone worked with the Steering Committee to undertake the prescribed work programme. It was soon realised that assumptions that Partners understood CI and the plan and were ready to proceed were incorrect.

Backbone has literally been faced with driving the initiative, instead spending a significant amount of extra time to build one on one relationships with each of the Partners and building relationships amongst key operational staff to ensure the support of #tātou whānau. The three Kaiārahi have been instrumental in managing working relationships with high whānau caseloads, the Partners and their frontline staff. They have all been on developmental journeys that far surpass their original assumptions of their roles and their skills coming in to their roles and they have become the faces of #tātou. Furthermore, all parties have been inexperienced with CI. The time pressures inherent within the initiative and the need to build the new whānau initiative have drawn on the full range of backbone staff skillsets to support, grow and understand progress made by the initiative and with whānau. Benefits for the Collective were emerging by the end of 2016.

Phase Two produced a whānau navigation and support service in #tātou in which whānau will now guide the Collective in achieving the Common Agenda. This new initiative and the data being generated has triggered a review of the original Action Plan Outcome and Indicator framework. #tātou has also been the catalyst for the CI initiative to identify better shared data; backbone services that work with better and growing understanding to support the initiative; Partners working more collaboratively and collectively to achieve outcomes; and improved communication resulting in strengthening of both strategic and operational aspects of the initiative. The journey to this point has not been an easy or comfortable one.

At the end of 2016, there was a definite move amongst the Partners and Backbone services toward reflecting on progress to date. There was a future focus and excitement around the Whānau Centre about ways that the Partners could better work together to support whānau coming through #tātou.



PHASE TWO: LEARNINGS FROM PHASE TWO

Whānau

1. Frontline workers are valuable sounding boards when brain storming about whānau needs provided there is a commitment to further adapt through whānau feedback. Taking this approach when developing the #tātou initiative, gave reasonably good information for early stage development and implementation.
2. Early engagement of whānau is important to focus planning to be more whānau centric. Once whānau were identified and engaged, the Partners could see how they could participate, which in turn generated ideas and strengthened relationships.

Management

3. Steering Committee members need mandates to act, as do their representatives. It was difficult to make decisions at steering group level when Partners were absent or representatives could not participate in decision-making, resulting in time delays or additional follow up from Project staff.
4. It would have been useful for the Steering Committee to collectively scope the workstream projects. Spending time on scoping projects with all involved, is important to help set realistic timeframes. The work programme at the start of 2016 had not allowed for the developmental aspects of the workstreams resulting in resource gaps and slippage in milestone timeframes.
5. It is helpful to have enough time and navigation support to access staff in Partner organisations for any CI research requests from the Steering Committee. Research staff experienced delays and complexities accessing Partner organisations to survey staff.
6. A CI training package would be helpful for all new participants in the CI initiative to build capacity as soon as possible. Information about CI had to be sourced individually by participants.
7. When starting up an initiative, participants should be prepared for a change environment. Backbone services staff worked in a fast changing environment and utilised a broad range of skills to carry out the work involved in the Action Plan.
8. It would be useful to revisit the role of the Steering Committee because there was a sense that Steering Committee members were covering both strategic and operational matters initially. Engaging with more operational staff benefitted #tātou whānau because it strengthened engagement of frontline workers and access to new and existing services.
9. It would be useful to have opportunities to talk specifically about roles and responsibilities. Some participants felt unsure about their place in the Collective and thought clarification would be beneficial.
10. It is important to identify ways to share learnings early and regularly to check progress against agreed criteria and values. Once gathering learnings became more regular in the Collective, participants who did share, gave new and valuable information, for example, Partner perceptions of CI and Kaiārahi learnings about whānau (Appendix Two).



PHASE TWO: LEARNINGS FROM PHASE TWO

Backbone Services

11. It is important to recognise when starting up, that not all Partners are ready or able to move forward collectively at the same time. The Project Manager found the need to spend a lot of time between Steering Committee meetings building relationships and knowledge with Partners.
12. It is important to spend time on scoping the work required for projects and identifying cross organisational barriers before setting outcome milestone dates. More time was needed to implement the workstreams towards the Common Agenda because of differences in organisational operations between each of the Partners.
13. Backbone services are useful to maintain the focus and momentum for CI. There were numerous occasions to demonstrate that work can be progressed in a focussed way without cross organisational barriers to navigate. A key example was the full development of the #tātou initiative under backbone services at a time when the Partners were still learning about CI and their roles.

Resourcing

14. It would be optimal to have a data analyst as well as research expertise on the Steering Committee from the outset. A data analyst would have been helpful when setting the Action Plan indicators early on.
15. It should be a priority to have a Project Manager at the beginning. It was found that there was a significant need for: building networks and relationships with the Partners and initiating a “learning culture”. Having to do this work later in the project took longer than expected and added to difficulties achieving milestones.
16. It is important to identify capacity requirements for Backbone staff early and bring them in to the initiative at the beginning, if their work is needed to set the Common Agenda and project manage. It was difficult for Backbone staff to lend their expertise to key developmental aspects when they had already been set in the first Phase.
17. The development of tools is a key consideration. Tools have been required to understand and measure changes against the Action Plan indicators throughout the project.

Culture of Collective Impact

18. It is important to look for tools and training which leverage on-going interest in the Collective and create quick wins. The use of story-telling had a powerful influence on mobilising the Partners to support #tātou when the first whānau story was presented and Partners were at a stage where they weren't sure about the ways they could support whānau being recruited to #tātou.
19. Building good working relationships at an operational level improves the momentum, but can take longer than anticipated. Once operational networks were built, there were more ideas generated.
20. Be flexible and adaptable and prepared to make change quickly to keep the initiative on course.



PHASE THREE: READY AND TOGETHER JANUARY 2017 – APRIL 2017

WHĀNAU DRIVEN #TĀTOU

The kaiārahi have improved their ability to use social media and have gathered and analysed information from whānau to identify the focus for the first quarter of 2017. The momentum over the Xmas period was maintained through the use of social media and kaiārahi being available occasionally across the holiday break. New initiatives for whānau have been developed and themed “Walks, Cooks and Talks” based on kaiārahi analysis of whānau needs. Kaiārahi reports and initiatives are valuable avenues for data at the moment because the focus is on whānau.

There are aspirations for the future, and kaiārahi understand and see the potential for expansion should a continuation of the initiative eventuate.

COMMUNICATION

There were no face to face meetings with the Steering Committee planned for the period January-April 2017. The outcomes data analyst has instead focussed on producing snapshots of data information to demonstrate the changes happening with #tātou enrolled whānau and these have been distributed in newsletters to Partners and backbone staff.

Monthly meetings with operational staff are continuing and proving valuable because each of the main Partners is represented. The meetings are an opportunity for health coaching, service discussions sharing of videos and identifying further opportunities to contribute to the Collective. The coordinator continues to work on a one to one basis with the Partners.

Further efforts are now occurring to build stronger relationships with some of the other smaller Whānau Centre Services.

DATA AND RESEARCH

In the early part of 2017, the work of research was focussed on assisting the data team to better visualise the data being generated through #tātou.

Although a formal evaluation of the CI initiative has not been undertaken, all parties have become more aware of the importance of learnings as another set of information to monitor and understand progress. The challenge is integrating lessons in a useful way in the future. Those decisions are yet to be made at Steering Group level.

RIPPLE EFFECTS

The DHB is currently co-locating senior staff with TPM to strengthen working relationships.

Rather than Partners co-existing they are now collaborating and developing other initiatives to support. Examples include Work and Income offering two training workshops to kaimahi from other services about benefits available and Columbus cafe offering healthy specials to enrolled #tātou whānau.

#tātou is being seen as a strong initiative that other providers and whānau want to join.



PHASE THREE: READY AND TOGETHER JANUARY 2017 – APRIL 2017

The next regional CI initiatives under Te Pae Herenga o Tāmaki have already been given more favourable contract terms based on the shared learnings of this initiative.

FUTURE FOCUS FOR THE PARTNERS

Priority is to secure funding to continue supporting whānau. Funding for the initiative was due to shift at the end of June 2017 to another of the regional partners in Te Kāhui Ora Collective, therefore the WCCII initiative had commenced discussions with WDHB for funding to continue to support #tātou for the full two years that was offered to whānau. This is consistent with the role of CI Backbone services.

A number of Parallel developments are also occurring with the WCCII. There is an opportunity for Backbone services to learn from these developments because of their potential to support the long term financial sustainability of the CI initiative and provide deeper understanding of measuring and valuing change over time.

Social Value Aotearoa Network – Helping organisations gain an understanding of, and the benefit of understanding the impact/change their service/programs make. It is a network which is developing a learning platform for growing NZ best practice and provides the opportunity to share work being done by organisations, for example Social Return on Investment (SROI).

Social Return on Investment – Social Return on Investment (SROI) is an internationally recognised approach for understanding and measuring the impact of a program, organisation or policy. Through engaging with stakeholders, it is possible to identify the social, environmental, and economic benefits generated and place a financial value on this impact.

Outcomes 101 – The use of Whānau Tahi as the database for CI has resulted in the need for Kaimahi including kaiārahi with #tātou to not only become better versed in the use of the new Version 5 but also understand the differences between an indicator and outcome. Barriers have been identified (e.g. the need to align language to frontline staff understanding, recognising the type of change and what we are seeing from the data). Therefore a training package is being developed to assist implementation in a kaimahi friendly way.

Adaptive Leadership – “Effective leadership disrupts the status quo, navigates resistance and creates growth and new possibilities³³”. The need to constantly review the leadership of the initiative was borne out in the constant change facing the initiative, the need for innovation and the nature of CI itself as dealing with complex issues and working to find ways to “move the needle” on the Common Agenda. The experience of the Project Manager, was the energy and drive required to keep the Partners moving forward and the multi-levels of communication required to build relationships. This has necessitated constant self-analysis of how relationships are being managed and facilitated for growth amongst all parties in the Collective.

³³Adaptive Change Advisors, 2017 Adaptive Leadership: Mobilising For Change, <http://plusacumen.org/courses/adaptive-leadership/>



PHASE THREE: READY AND TOGETHER JANUARY 2017 – APRIL 2017

Building a Learning Culture – The first efforts to formally record learnings occurred in June 2016. It was difficult to introduce methods for gathering learnings when the Partners were focussed on the detail of their workstreams and engaging whānau. The learnings feedback progressively received in the second half of 2016 through different methods, indicates perhaps a variety of methods should be used. The feedback has been insightful and highlights the implementation issues of CI. Some of this feedback is consistent with the literature review provided with this report, discussing problems of implementing CI. The challenge going forward is to agree a focus for the gathering of learnings, for example Common Agenda, Operational issues and create regular space to discuss learnings amongst the Steering Committee, Partners and other staff, to inform progress and assess achievements. The risk is that research and gathering of learnings is viewed as an add-on rather than an integral part of the CI initiative. Moreover, not taking heed of the information, risks unnecessary action being taken to meet outcomes or the wrong or unimportant data being collected.



PHASE THREE: READY AND TOGETHER SUMMARY

Kaiārahi have gained traction in a number of areas. Whānau who have been difficult to engage with are now starting to interact on Facebook. There is a focus on building long term resources and connections through different approaches to the #tātou Facebook page (#tātou walks, talks, cooks) that whānau can be a part of now, or come back to when they are ready.

Operational level meetings are happening with key staff and different services have resulted.

Partners are sharing more training opportunities and meetings with Partners are a lot more productive with more actions being offered as opposed to being driven by backbone.

Backbone services acknowledge a stronger sense of readiness amongst the Partners to move to progress the initiative further. The CI collaboration is now much stronger. New and stronger relationships across partners are emerging such as the monthly health practitioners hui that includes all partners but with practitioners involved rather than just steering committee representatives.

Planning for long-term sustainability is underway with a number of parallel activities in train to provide the platform for the CI initiative to continue long term. This is over and above the work occurring within #tātou.

The learnings in this Phase are a product of taking time to reflect, consolidate and plan for the future.



**“Speed (of CI) is driven by the trust
and understanding between partners”**

– Jo Nicholson, Project Lead



PHASE THREE: READY AND TOGETHER

LEARNINGS FROM PHASE THREE

Whānau

1. It is important to consider the authenticity of whānau participation. Presently #tātou whānau and Partner staff enrolled in #tātou provide that conduit, but the question arises whether that is sufficient when compared to the Conditions for success most recently offered for CI³⁴ under Inclusive Community Engagement (Appendix Four).

Management

2. CI can be challenging for managers. It requires new ways of thinking and doing as well as changing ideas about self.

Backbone Services

3. Learnings and whānau stories provide additional and useful indicators of change. These have been evidenced in dialogue with participants.

Resourcing

4. It is important to be mindful of future considerations and the potential that directions may need to change quickly. Working in a funding environment for essentially a long-term approach such as CI requires strategic innovation.

³³Adaptive Change Advisors, 2017 Adaptive Leadership: Mobilising For Change, <http://plusacumen.org/courses/adaptive-leadership/>



PHASE THREE: READY AND TOGETHER

CONCLUSION

Ngā Pou o Te Whare o Waipareira have trodden a new path to understand the application of CI in an indigenous, New Zealand urban setting and recorded learnings. The challenges faced by the Partners and backbone staff in establishing the initiative can now be shared to be considered by others but in particular partners Te Pae Herenga o Tāmaki.

Additionally, the literature review aims to identify potential risks (some of which have become known to this initiative in practice) in the hope that these too can be mitigated for those new to CI.

The core group worked together to apply CI and the Action Plan is the embodiment of CI as the group saw themselves acting at that stage. They decided their direction and are now working collectively in that direction. There is still more to do to build a learning culture and improve their connectiveness and the lessons give some guidance for future improvement.

There is a recognition that they have been through a significant learning period and acknowledgement amongst the participants that there is more cohesiveness in the Collective.

Learnings

Five categories have been identified and the learnings grouped accordingly. They include:

- Whānau
- Management
- Backbone Services
- Resourcing
- Culture of Collective Impact

The learnings reflect the start up nature of the collective. Essentially the initiative started with both Partners and backbone staff inexperienced or lacking understanding of collective impact. Through the utilisation of CI methodologies, learnings have been evidenced through a variety of circumstances.

CI can be challenging for managers. It requires new ways of thinking and doing as well as changing ideas about self. They can contribute to enhancing organisational processes and resources for individual learning to travel towards collective organisational learning.

It has been found that everyone is learning and stronger relationships develop in an environment where people's voices are heard through open dialogue and valuing each others ideas.

The learnings have highlighted the importance of building strong relationships and not underestimating the time this takes, keeping communication lines open to clarify assumptions and creating safe opportunities to learn quickly from one another in applying the methodologies of CI towards a Common Agenda.



PHASE THREE: READY AND TOGETHER CONCLUSION

It is noted there is a need to be able to cope with change and to remain flexible with decisions should the needs of whānau determine a change of course.

The need for strong leadership which is able to push through barriers and drive development is important, as has been demonstrated by the role of backbone services, but equally important is the continued dialogue at all levels to keep all parties informed. There have been times when it seemed all about the Backbone, but ultimately, that is their role, to keep focus when Partners have other competing demands for their time. Partner leadership is also a key consideration, but it should be remembered that this initiative is still evolving.

Whilst there is a wide range of skills available across backbone services and amongst the Partners, all have experienced a learning journey that at times has been difficult, but resulted in the acquisition of new knowledge, opening themselves up to innovative thinking applying directly to the whānau engaged in #tātou. The power of whānau in helping the Collective focus cannot be underestimated. The positive effects of focussing on their journeys and their data, allowed the Partners to align with the conditions of CI in a practical way. There are still challenges facing the data and research team to find ways to measure change that is visually understandable and provides a common dashboard for the Steering Committee.

The Collective has been able to share learnings along the way with the Regional Partners of Te Pae Herenga o Tāmaki. These learnings have already resulted in additional resources being made available in the form of a Project manager and data analysts to the other regional Partners, longer contracting periods and an extension of six months to the #tātou initiative under Ngā Pou o te Whare o Waipareira.

Work continues on a range of other areas of learning and activities which have the potential to enhance the long term sustainability of #tātou and any other initiatives that may arise in the future.

Despite the fact that the Collective has been together for two years, there is a sense that that was a time of preparation to develop stronger collaboration and a sense of readiness to move forward collectively now.

E hara taku toa i te toa takitahi, ēngari he toa takitini

My achievements are not mine alone, but those of many



BIBLIOGRAPHY

Adaptive Change Advisors. (2017). *Adaptive Leadership: Mobilising For Change*. Retrieved from <http://plusacumen.org/courses/adaptive-leadership/>

Cabaj, M. & Weaver, L. (2016). *Collective impact 3.0: An evolving framework for community change*. Tamarack Institute.

Hapai Te Hauora. (2016). *Te Pou Matakana collective impact initiative: Formative and process evaluation*.

Hanleybrown, F., Kania, J. & Kramer, M. (2012). *Channeling change: Making collective impact work*. Stanford Social Innovation Review, 1-8.

Kania, J. & Kramer, M. (2011). *Collective Impact*. Stanford Social Innovation Review.

Pihama, L., & Penehira, M. (2005). *Building baseline data on Maori, whanau development and Maori realising their potential*. Auckland, New Zealand, Te Puni Kokiri.

SVA Consulting. (2015). *Whānau Centre Collective Impact Initiative – Ngā Pou o Te Whare o Waipareira: Final deliverable for October – December 2015 period*.

Te Pou Matakana. (2014). *He Whakamarama: An overview*.

Te Puni Kōkiri. (2015). *Whānau Ora Annual Summary Report 1 July 2014 – 30 June 2015*.

Te Whānau o Waipareira. (2016). *Annual Report 2015-2016*.

Te Whānau o Waipareira. (2015). *Whānau Centre Collective Impact Invitation to First Meeting 2015*.

Wai-Research. (2016). *Ngā Pou o Te Whare o Waipareira: Report on “Understanding Your Health Needs” survey findings*.

Wai-Research. (2016). *Ngā Pou o Te Whare o Waipareira – The Whānau Centre Collective Impact Initiative: A Report about the Baseline Partner Survey “Staff understanding of Services and Referral Practices”*

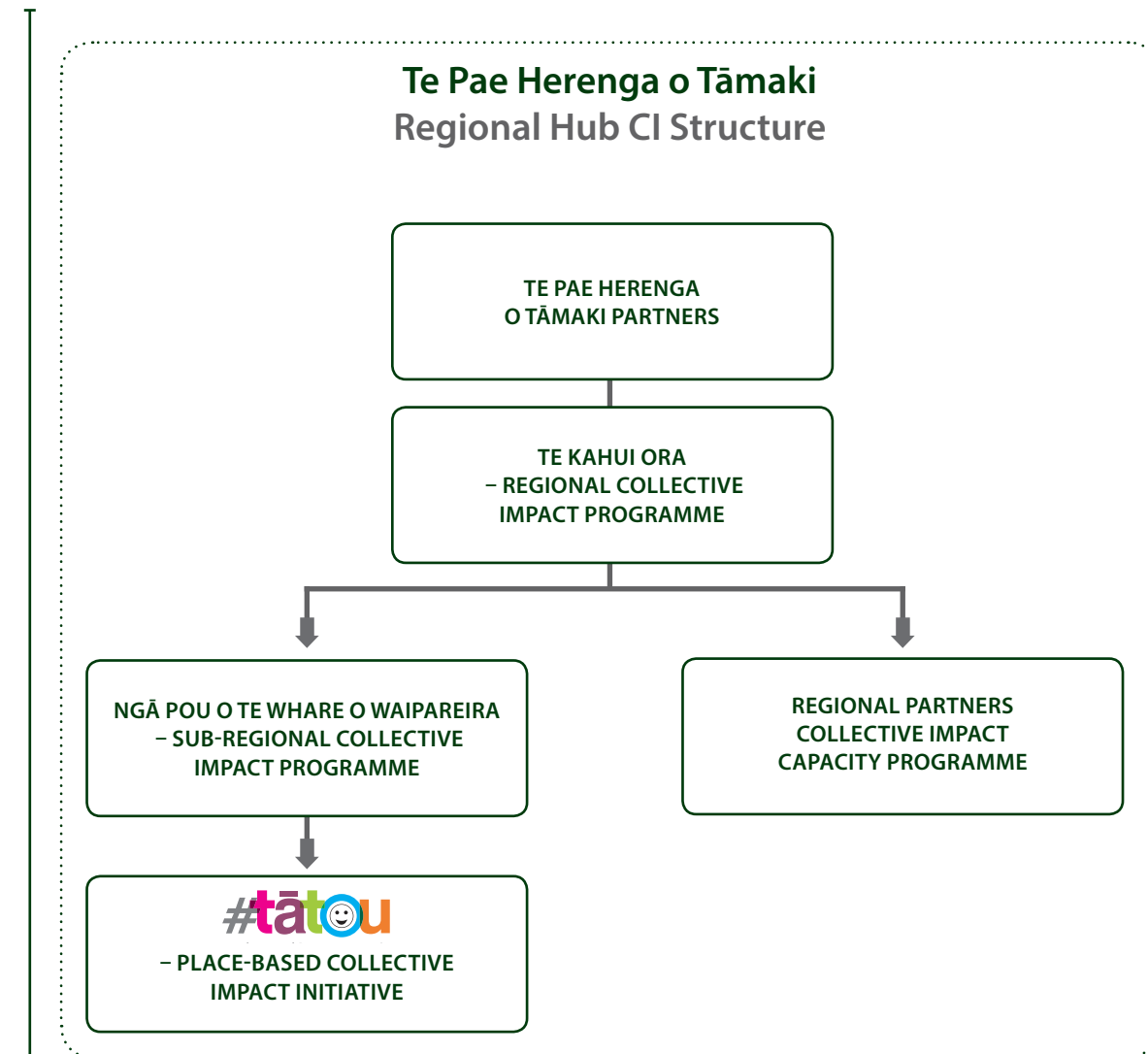
Whanau Centre. (2016). *Collective impact survey: health literacy*. Te Whanau o Waipareira Trust.

Whānau House Collective Impact Initiative. (2015). *A pre-reading pack for the partners of Ngā Pou o Te Whare o Waipareira*.

Whanau Ora Taskforce. (2010). *Whānau Ora: Report of the taskforce on Whānau-centred initiatives*.



APPENDIX ONE REGIONAL COLLECTIVE IMPACT STRUCTURE



APPENDIX TWO BACKBONE AND PARTNER REFLECTIONS

The following section is included to discuss reflections collected from members of Backbone services and some of the Partners. They highlight key learnings from the overall implementation of the Whānau Centre initiative. In keeping with the notion of Whānau at the centre, this section firstly looks at the role of Kaiārahi, Coordination, the Partners and lastly Research and Data.

KAIĀRAHI

At present in the evolvement of #tātou, kaiārahi are responsible for working directly with whānau, represented by the public and staff enrolled in the initiative. They were recruited for their lived experiences related to weight loss, fitness, training and exercise, coaching, nutrition, whānau networks and their tenacity at what they have been involved in.

Two group interviews occurred with this roopu of three kaiārahi, one in November 2016 and again in early April 2017.

Increased Understanding of CI/Challenging Role Norms

"Definitely been a big shift in the way I see Tātou. I came into this thinking it was a new service and I would be a kaimahi. I realised it is now more than that. I understand CI now. Tātou is a small portion of the bigger picture but still an important part. So it's been about whānau, Partners and data"

Another:

"It's more than I expected, not just the delivery to whānau to get them to lose weight but more than that – to work better with whānau and together and the data as well".

"We have whānau, we have partner relationships which takes a big chunk of our time. We have all the data and research alongside. Not only managing big caseloads, how can we best manage our time efficiently is the question".

Working Innovatively/Personal Development

This group have had to overcome personal barriers:

"There's another role and that's being innovative, the use of social media. Not something I've used..."

"We were shy before but we're not so shy now and we're actually enjoying using social media".

With the use of media they started with face to face, phone calls and emails and then set up a closed Facebook page. They wanted to have a safe space for Tātou whānau to share so put in things like links to services and live videos. They recently opened up the page to partners to see what they can offer to whānau. They're able to see who's not engaging. We have noticed quite a big increase in engagement on Facebook. As time goes on whānau experience shifts;



APPENDIX TWO

BACKBONE AND PARTNER REFLECTIONS

Texting involved weekly motivational texts. Some home visits have resulted from texts. They are reaching 122 whānau and most are engaged. Numbers have been seen to be increasing slightly each month. They shared that Twitter *"is not really for the whānau, it's mainly for organisational stuff"* It was notable however that one of the kaiārahi had a wide range of Twitter followers from whānau ora commissioners and researchers to other whānau ora providers around the country. Facebook has still been the best medium and texting. Snapchat hasn't really been used because of issues linking to their own private accounts, however they have observed it used in other initiatives.

What has been interesting to note in discussions with this roopu, is their passion to work with whānau. They have undergone a range of training eg use of the software, health literacy, health coaching as well as social media but in discussions with them, whānau are very much central.

Dynamic teams/Team leadership

They also shared their thoughts about the kaiārahi team as a whole;

"We have a good team makeup, a real highlight. The dynamic is important"

Their leadership was also an important part of the equation, explaining that Jo (the team leader) and Kristen provided good leadership to look at things and develop, putting them out of their comfort zone

- They needed to adjust to change:

"Disrupting the norm"

"... we are now consolidated in our roles"

Obstacles to working with whānau

They found challenges and barriers to focussing on whānau during 2016. These insightful thoughts show the need for understanding and advocating for a whānau centred approach. The ability to focus on whānau they saw as central to what they did

"Our main focus is it's their journey and our role as kaiārahi"

"The challenge was with the workload and the timeframes around collecting information. It would have been good to spend more time with whānau before gathering the data"

"We were lumped with quite a few tasks around collecting data. It affected the way we were able to engage with whānau in terms of "on their specific plans". We would have to go back and collect data and put whānau on hold"

"In order to get real weight loss and health gain – losing weight is the easy bit. Most of the work is what else is going on for them. On the one hand we are in this space and taking weight and measurements etc but whānau head space is somewhere else and thinking about things like – money, access, time, knowledge and convenience"



APPENDIX TWO

BACKBONE AND PARTNER REFLECTIONS

Kaiārahi wanted to run regular workshops in 2016 but couldn't because of other demands but feel they are getting there and running more things in 2017. They are:

"also getting the gear to take the baseline statistics now"

Building Relationships

Partner relationships also created demands on their time *"being the face of Tātou within the whānau centre"*. Each kaiārahi is now working with a Partner each. Now there are initiatives coming out of the other Partners. They have also worked with the café, who offer healthy specials for #tātou whānau and staff.

Meetings were started in December 2016 with Whānau centre key staff once a month.

They are still establishing relationships with the smaller providers in Whānau House such as physio and Smile Dental.

"In the future it would be good to open up the referrals because there are people that are wanting to come in but it depends on the roll over now"

"We have made a few changes and that's important"

PROJECT LEADERSHIP

The Project Coordinator and later her assistant were asked for reflective feedback. This was useful because of their role in managing coordination of the overall CI initiative, and development, establishment and overseeing of implementation of the #tātou initiative. Their feedback talked about the journeys they had been on. The following were noted;

Relationships take longer than anticipated

Having to forge new relationships at the start of 2016 slowed the implementation process;

"they didn't know me when I came on board. Don't underestimate the amount of time needed for relationship building"

Incorrect assumptions

Early assumptions proved incorrect, so affected the ability to move forward more quickly;

"... I didn't realise that the inherited hand over action plan hadn't been agreed to by all partners and was in fact instead a recommendation on the way forward"

Development of the Navigation Stream was subject to constant change and testing putting kaiārahi under *"considerable stress in the design and adapt stage"* highlighting a need for staff to know they face constant change particularly working in a time constrained environment.



APPENDIX TWO

BACKBONE AND PARTNER REFLECTIONS

Role of Steering Committee vs Operational staff

"the committee was used to try and implement the CI initiative and really (the) role of Steering Committee should be for strategic oversight, risk mitigation and relationship building. Once we got more operational staff coming to the meetings progress was made around how to implement".

Use frontline workers when brainstorming for whānau initially because they "have a strong idea of whānau needs and aspirations, of what works and barriers which meant we could get feedback that was 'good enough' for early stage development of the #tātou initiative". This should be supported by "a commitment to keep adapting to whānau feedback throughout".

Communication challenges

"Multi levels of communication needed. This is a full on role initially as relationships are forming".

"Need to keep kaimahi in the loop and build their knowledge of what we are trying to achieve".

"Operational staff need to be kept in the loop as they have the 'how to' knowledge".

"Community groups... they are interested and often need longer lead in times to be able to feed into the project".

"... felt at times like it was falling on deaf ears but as we progressed you could see that this has built up stronger relationships across partners as they shared more and were more trusting and eager to find ways to work together".

Keeping whānau in the picture

"Getting them in front of the steering committee and operational committee often breaks down road blocks"

A particular "ah ha" moment was considered to be the whānau story presentation at the May 2016 meeting:

"CI can remain more conceptual for partners whereas backbone is more immersed in the practicality of it everyday. Putting whānau at the centre makes it more real for them – but we wouldn't have had whānau to put at the centre if it hadn't started with backbone driving initially".

Partners not ready at the same time to participate

"The term herding cats is definitely apt during the implementation phase"

sometimes

"... changing the question is a better technique when faced with a roadblock... "



APPENDIX TWO

BACKBONE AND PARTNER REFLECTIONS

Innovation harder in practice

"... people can talk about new and innovative ways of working very easily but the practice of it often turns out a lot harder and more challenging than they estimated"

"Focus on engaging hard to reach whānau, grouping whānau in order to work smarter, developing Facebook group as alternative means of support".

Mutually Reinforcing Activities not well understood

"But idea of mutually reinforcing activities not widely understood at this point so was hard to synergise with existing services".

Measuring Change as soon as possible

"... look at medium and long term outcomes and indicators as early as possible and develop tools as soon as you can. This is hard to do when an initiative is developing so quickly but the more you can do this, the better placed you are to measure change without impeding as much on whānau or partners".

Backbone roles and responsibilities

"There were plenty of times when the backbone had to drive the momentum for this initiative and it seemed more like it was being controlled by us".

"Our position (being removed from the day to day focuses of each organisation allowed us to see the potential of this new way of working, but we had to take the first steps to show the other partners the way first, to find short term wins that spoke to them in order to convince them of the long term approach of shifting the way we work".

"... the way backbone has been refreshed to 'Container of Change' really articulates well how backbone functions – particularly around it being involved in "facilitation of the participants' inner journey of change ... required for them to be open to fundamentally new ways of doing things".

CI changing role perceptions and services

"Our kaiārahi, for example, went through huge struggles with the uncertainty and constantly changing nature of this initiative but now lead out their own changes and developments.

"Other services are adapting some of their approaches as it becomes clear that they can add value to their more practiced modes of working".

The process of building trust and changing the way we work takes way more time than you ever think it will but just because you can't always see it doesn't mean it's not happening.



APPENDIX TWO

BACKBONE AND PARTNER REFLECTIONS

PARTNER REFLECTIONS

In the first gathering of reflections in June 2016, it was clear that Partners were still growing their understanding of CI and the Whānau House initiative. Responses using the framework distributed by backbone services showed that workstream activities were taking much of their attention.

Role uncertainty Strategic vs Operational Activities

"We need to clarify our partner roles both strategic and operational... eg are we clear about the backbone role, partner roles etc"

"The current steering group meeting process has less of a strategic function and more of a working group function... Maybe formalise half the meeting for sharing workstream updates and the other half invest in strategic discussion..."

"The steering group... needs to move things along to targets... invest the time in planning and as an action forum

Project Management role

The role of coordination was seen as complex enough as well as leading a workstream;

"... it's hard to project manage the process and lead a workstream as well as manage the external politics of partners... which could affect the outcomes of the CI programs"

Role and responsibilities of Partners need to relate to the needs of CI

"Need to ensure that clarity of roles for each partner translates into behaviour reflecting the CI intent and delivery against target ie one stream fails, we all fail"

"There needs to be more collective ownership of the CI initiative"

Including whānau at the beginning

There was recognition that maybe whānau should have been the focus of their forum from the start;

"The most important milestone will be the cohort of 240 whānau, maybe that should have been the overriding focus of the steering group forum from the start".

CI changed the way we work together and think about things

"We were all sort of co-existing, with no information being shared, going about your tasks and people not getting any better, people getting worse."

"So this was a really great platform to come in and say – How can we make a difference for our community? And what are you bringing to the table – so what is your organisation interested in doing?"

"... biggest challenge trying to get my head around what collective impact meant, this was a new space for us... there are a lot of different ways of thinking about it and approaching it."



APPENDIX TWO

BACKBONE AND PARTNER REFLECTIONS

"... having to be open to the direction not being set by (their organisation) and really approach it as a true open Partner"

"... biggest challenge... ability to share information on a common platform so the population... can be identified and the overlap/duplication can be leveraged more effectively and efficiently."

"... learning is high complexity and vulnerability of the patient population."

"The evolutionary part of the data, what we really wanted as a collective to help form the picture for us in terms of – outcomes we'd actually set. I hadn't really done that as a developing process."

DATA AND RESEARCH

Data Collection Challenges

Some of the challenges facing the data analyst are the:

- "Multiple sources to get the raw data"
- "Data integrity / reconciliation"
- "Having enough progression data available"
- "There are many stakeholders in the initiative and it takes time for things to move from theory to action"

Ideas about data collection

- Useful to have "one system to capture all the data"
- Useful to have someone to "manage data integrity from day one"
- There is a need to document and integrate the data more effectively and efficiently.
- Require Involvement of analysis team from the start so as to design the data collection, indicators and outcomes and ways to access the data in a better way.



APPENDIX THREE CI LEARNINGS TOOL

Date: _____ **Collective Impact Partner Feedback**

Please reflect on progress to date in any of the following areas and share any personal learnings in column two.

Six Conditions of Collective Impact	Learnings / Progress to “move the needle” Are we on track?
Common Agenda <ul style="list-style-type: none">• Vision• Mission• Current Objectives• 17 priority outcomes Jan – June 2016	
Backbone Support <ul style="list-style-type: none">• Provide objective, independent support across all groups and activities	
Mutually Reinforcing Activities <ul style="list-style-type: none">• Activities we are engaging in across the health value chain• 4 Working Groups: Whānau navigation, Whānau Centre service integration, Whānau Centre workforce training, Whānau Centre workforce health	
Shared Measurement <ul style="list-style-type: none">• Staff outputs• Budgets• Milestone Indicator Framework	
Continuous Communications <ul style="list-style-type: none">• Planning Meetings• Other communications to progress to outcomes	
Whānau Engagement <ul style="list-style-type: none">• Identifying priority whānau• Health Literacy survey report	
Emergent Issues – the good , the bad and the ugly	
Any “ah ha” moments	
Suggestions for improvement	



APPENDIX FOUR CI CHANGES TO CONDITIONS FOR SUCCESS

From	To
The Leadership Paradigm	
Management	Movement Building
The Five Conditions	
<ul style="list-style-type: none">• Common Agenda• Shared Measurement• Mutually Reinforcing Activities• Continuous Communication• Backbone	<ul style="list-style-type: none">• Community Aspiration• Strategic Learning• High Leverage Activities• Inclusive Community Engagement• Containers for Change

Source: Cabaj, M. Weaver, L. 2015, Collective Impact 3.0 An Evolving Framework for Community Change – *From the Improbable to the Possible*.



GLOSSARY

Hapū	– Sub-tribe
Iwi	– Refers to a large group of people descended from a common ancestor and associated with a distinct territory
Kaiārahi	– Worker who navigates whānau through services
Māori	– Indigenous peoples of New Zealand
Reo	– Māori language
Tātou	– Us (including those spoken to)
Whakataukī	– Proverb, significant saying
Whānau	– Extended family, family group, a familiar term of address to a number of people - the primary economic unit of traditional Māori society
Whare	– House, building



Whānau Centre: Level 1, 6-8 Pioneer Street, Henderson
Postal: PO Box 21 081, Henderson, Auckland 0650
Phone: +64 9 836 6683 **Freephone:** 0800 924 942
Facsimile: +64 9 837 5378 **Website:** www.waipareira.com