

27 November 2023

Social Wellbeing Agency – Toi Hau Tāngata

Briefing to the Incoming Minister
for Social Investment

Hon Nicola Willis

**SOCIAL
WELLBEING
AGENCY**

TOI HAU
TĀNGATA



**Te Kāwanatanga
o Aotearoa**
New Zealand Government

Tēnā koe, Minister

Tēnā koe e te rangatira, nau mai, haere mai ki tō tūranga e te Minita mō Toi Hau Tāngata.

Welcome to your role as Minister for Social Investment.

Congratulations on your appointment.

Since we were established in 2016, we have built a small, agile, multi-disciplinary team. We can support the social sector to implement the social investment approach and can be deployed to help understand and address the most challenging cross-cutting social issues.

This initial briefing gives you an overview of:

- **our journey**
- **examples of our cross-system analytical advice and tools**
- **how we work with others**
- **implementing a social investment approach**
- **our current appropriation**
- **our organisation.**

The building blocks are in place to support an enhanced approach to achieve improved social outcomes.

We look forward to working with you to deliver on your ambitions for New Zealanders.



Renee Graham
Chief Executive, Te Tumu Whakarae
Social Wellbeing Agency, Toi Hau Tāngata

Our journey

We were initially established in 2016 as the Social Investment Unit and became the Social Investment Agency in 2017. Our purpose was to provide all-of-government social investment advice and build the components required to implement a social investment approach.

In March 2020, we changed to the Social Wellbeing Agency – Toi Hau Tāngata focusing on:

- providing cross-social system advice and supporting the social sector with cross-system work
- creating insights, tools, and practices that improve cross social system decision-making for improving wellbeing.

In addition to our role in strengthening the use of data and analytics, our roles have included:

- strategic advice on issues that cut across, or fall between, agency responsibilities
- resource that could be called upon to lead, on behalf of all agencies, cross-cutting pieces of work
- a strengthened secretariat for the Social Wellbeing Board
- support for the Officials Committee for the Social Wellbeing Committee, where necessary (for example, monitoring progress and activity against the Cabinet Priority Committee's priorities allocated to the Cabinet Social Wellbeing Committee (SWC)).

We support evidence-based decision-making on challenging social issues that don't fit neatly into the responsibilities of a single agency. We collaborate across the social sector and focus where our work can make the greatest impact for New Zealanders.

We will work with you to set our work programme to deliver on government priorities of the day.

You do not have any legislative or operational service delivery responsibilities in this portfolio. Working on other portfolio issues generally requires support from Ministers responsible for those portfolio areas.

Our structure and people

We are an operationally autonomous Departmental Agency, hosted by Te Kawa Mataaho Public Service Commission.

We are headed by our own chief executive and have two business groups that lead and support our work. As at 31 October 2023, we employ 41 people (39.2FTE). Eight of these are fixed-term staff.

The Ministry of Social Development provides corporate and IT services to us through a shared services agreement.

Our values

Our agency values, developed by our people, guide how we work and underpin what we do.



TĀNGATA

We're about people

People will do better, sooner and for longer when the social system works in partnership, acting on better evidence to develop and deliver services.



MANAWA MĀUI

We are a catalyst for change

We challenge the status quo constructively and seek better ways of doing things. We help create change to improve lives through different approaches.



TAUNAKITANGA

We influence through evidence

We use evidence to influence positive change for New Zealanders.



PUARETANGA

We're transparent by nature

We will share what we're doing, how we're doing it, and what we learn.

Cross-system analytical advice and tools

Our core capabilities

Our capabilities rest in four main areas that can be scaled up to achieve Government's goals and to support the social sector to improve outcomes for New Zealanders. Our independence and skills in identifying and translating complex data is where we can add value for social sector partners and decision-makers.



Insights and advice

We have insights and policy analysts that can advise social sector partners

and help them interpret data to understand what happened, why it happened, and what actions might be taken. This information is used by our partners in a variety of ways, including in their advice to decision-makers, informing their areas of focus, and to clarify/confirm topical issues.



Advanced analytics

Our data scientists are experts in using the Integrated Data

Infrastructure to understand the experiences and outcomes of New Zealanders. We analyse issues that cut across single-agency boundaries leading to more informed decision-making. We are also able to use the Integrated Data Infrastructure (IDI) to identify the effectiveness of programmes.



Data engineering and storage

Our data and analytics platform enables us and other social sector partners to safely and securely organise and store data so that it is easier to use, analyse and share in a cost-effective way.



Data visualisation and dashboards

Our data and analytics platform enables us to make complex data more accessible for non-technical users via data explorers and/or curated dashboards.

We also have capability in:

- **Stakeholder coordination and collaboration** - We work across the government sector to coordinate cross-sector advice. We also hold relationships and engage with external stakeholders to inform our work, for example we host a regular Wellbeing Researchers Forum.
- **Data protection, use and ethics** - We participate and contribute to social sector conversations regarding the safe and ethical use of data and new technologies as they emerge.

Providing cross-social system advice

Our evidence-based advice includes analysing integrated data to look at characteristics, experiences, needs and outcomes across different systems and over time. We identify people who received a support and compare outcomes to similar groups of people that did not receive the same support and we can simulate or project outcomes by looking back at the key factors that were associated with certain outcomes.

Some recent examples of our cross-sector insights and advice include:

- Providing insights on youth crime that directed resources and focus to the communities with concentrations of young people with high needs associated with offending.
- Supporting the response to Cyclone Gabrielle and the Auckland floods with analysis about the social outcomes of impacted areas.
- Identifying learners with highest needs to advise on potential improvements in how the education and health systems identify need and where there may be gaps.
- Evaluating Alternative Education and Teen Parent Units using the Integrated Data Infrastructure to understand the longer-term and intergenerational outcomes associated with these services.
- Supporting cross-agency work to improve older people's lives by identifying needs of older people and their experiences of vulnerability and disadvantage.
- Advising on an approach to build the evidence base for, and measure the progress of, the Government's strategy to eliminate family violence.
- Informing cross-agency work on debt to government by identifying the impact of persistent debt and the populations most impacted by government debt, understanding individuals with children who have debt to government, the persistence of debt, and the breakdown of private and public debt.

We are experts in using the IDI for cross-sector advice

We are well-recognised for our expertise in providing insights and advice using the Integrated Data Infrastructure (IDI) to shine a light on where the sector could prioritise its efforts to improve outcomes for New Zealanders.

The IDI is a large research database that holds de-identified data about people and households. The data is about life events, like education, income, benefits, migration, justice, and health. It comes from government agencies, the Census and other Stats NZ surveys, and non-government organisations.

The IDI enables us to link data to build a rich picture of the characteristics and experiences of New Zealanders. We can take a snapshot in time to understand what is happening, and we can also find patterns in the data to understand why it might be happening and what might happen next.

Supporting the Social Wellbeing Board

We provide secretariat support for the Social Wellbeing Board (SWB) — a cross-sector group of chief executives that oversees work seeking to achieve outcomes beyond the remit of any one agency. The SWB Secretariat is currently based at Te Kawa Mataaho Public Service Commission. SWB's current role is to work on the most challenging and cross-cutting issues that are beyond the remit of any single agency and require a people-centred, integrated, sustainable and enduring approach to improve outcomes. You may want to review these governance arrangements.

Creating insights, tools, and practices

We have had a focus on creating tools, insights, and practices to support evidence-based social sector decision-making. Over the years, this has included:

- Data Exchange (DX) – a safe, secure and easy method for government and service providers to transfer data. It is now owned and operated by Eight Wire Limited.
- Data Protection and Use Policy (DPUP) – we developed and now champion the guidelines for the respectful, trusted, and transparent use of people’s data and information. Ownership has been transferred to the Government Chief Privacy Officer (Department of Internal Affairs).
- Social Sector Data Sharing Standard – a standardised format for data collection and sharing, making it easier for organisations to share and use data.

Our current focus is on supporting others, especially smaller agencies, to build the skills and tools for evidence-based decision-making.

Our data and analytics platform

In partnership with Te Puni Kōkiri, we built a cloud-based, fit-for-purpose and cost-effective data and analytics platform. This enables secure and efficient access, storage, analysis, visualisation and sharing of data. We are building a library of curated, community-level social data. We use the platform to make the data accessible to social sector partners.

Smaller government agencies are beginning to use the platform to meet their data needs, monitor outcomes and inform decision-making. This enables agencies to save the costs of building their own platform – reducing duplication of infrastructure investment. In addition to Te Puni Kōkiri, we have agreements in place enabling the Independent Children’s Monitor, Te Puna Aonui and the Ministry for Ethnic Communities to use the platform. We seek financial contributions from agencies towards the maintenance and running of the platform.

Promoting data and evidence sharing

We promote the practice of sharing data, evidence, and insights so that people across the social sector can learn from each other’s work and findings and avoid duplication of effort.

- We host and participate in research forums and symposiums, including a quarterly Wellbeing Researchers’ Forum.
- We are exploring opportunities to revitalise The Hub website, the repository for Government-funded social science research www.thehub.swa.govt.nz

How we work with others

Relationships underpin our approach. Without funding, operational or policy levers of our own, we work through and influence others to improve the lives of New Zealanders.

We focus our efforts on building relationships in government, as the centre of funding, policy and programme decisions that impact New Zealanders. There are three ways that we partner and collaborate with social sector partners in government including:

- commissioned data and insights projects
- providing infrastructure and tools
- building data and analytics knowledge and skills.

Most of our partnerships have focused on commissioned data and insights projects, but we seek partnerships that include the data and analytics platform and building data and analytics knowledge and skills. These partnerships expand our ability to have impact across the sector beyond our own capacity through commissioned products.

We generally provide a cost-free service to government agencies (particularly those in the social sector). However, we enter contractual or cost-recovery arrangements if the project has significant costs and impact on the agency.

Supporting others to use the IDI

Using the IDI requires advanced skills in data analytics and safety. We have built up knowledge of the IDI and support the IDI community and researchers:

- We have built tools that assemble data and apply confidentiality rules quickly and efficiently.
- We contribute to the IDI community of practice by sharing codes, knowledge and skills via user groups, wiki pages and data dictionaries.
- We are working with Stats NZ to develop standard code modules that we can all use consistently.
- We share and publish the codes for all our indicators and definitions on our public GitHub website for researchers to reuse.

Our external relationships

We work with a wide range of agencies across Aotearoa New Zealand to share our insights, learn from other agencies' experience and look for common areas of work where we can make a difference to the outcomes of New Zealanders' lives. Below are some of our formal relationship arrangements.

Iwi/Māori

- Since 2013 **Te Hiku o te Ika Iwi** and the Crown have had a Social Accord. One area Te Hiku has expressed interest in is the development of a wellbeing monitoring tool to track progress towards outcomes of those living in the Far North.
- We are named in **Ngāti Maniapoto's** Deed of Settlement with the Crown. We have previously partnered with Ngāti Maniapoto on our project Aronui, which sought to address and remedy the effects for iwi after the 2018 Census left gaps in iwi data. We are now developing a work programme to support Ngāti Maniapoto with their data requirements.

Academia

- We don't currently employ a Chief Science Advisor, however we engage regularly with government **Chief Science Advisors** from other sectors.
- We partner with **Informatics for Social Services and Wellbeing** (an MBIE-funded programme with **Victoria University of Wellington and University of Auckland**). The programme is aimed at developing national linked data and leveraging the data approaches to improve the delivery of social services.

NGOs and community organisations

- We consult and test our work with community organisations and working groups to ensure we incorporate lived experience in our insights and advice.
- We partner with **Philanthropy New Zealand** to co-chair a quarterly Philanthropy and Government agency forum focusing on strengthening collaboration and innovative approaches that will benefit communities. The forum began in 2014 and now involves 19 government agencies. The next Philanthropy and Government Forum is scheduled for 23 February 2024.

Implementing a social investment approach

Improving outcomes for New Zealanders across the social sector

You have said that a social investment approach will be the organising framework for how social services are funded and delivered, and we anticipate the approach will be expected both within agencies and to address cross-cutting social issues.

In 2016 the social investment approach was introduced in the social sector and many of the tools and frameworks continue to be used across the social sector.

Within agencies the use of advanced analytics to inform investment and prioritisation decisions has developed. For example, the Ministry of Social Development uses an investment approach to purchase employment programmes and Ministry for Education uses integrated data to determine funding levels for schools.

At a system level, agencies gather, share, analyse and use data and evidence to identify priority cohorts of concern. This has included using integrated data through the IDI to highlight needs and issues beyond the focus of individual agencies informed by feedback from our frontline workforces such as Police and teachers. The IDI is a piece of critical infrastructure and we have become more sophisticated in its use. We have more information available to us about the indicators of poor outcomes than we had before and the use of the IDI to understand impact has developed. There are opportunities to build on existing and new capabilities both within and across agencies, like regional capability and collaboration, and decision-making mechanisms. Activities to embed a social investment approach include changing wider settings to drive broad change and impact (e.g. use of public sector targets, funding settings through the budget process, legislative obligations and entitlements) to more targeted activities. We could use the IDI to help inform the selection of targets and to identify cohorts at risk of poor outcomes.

Refreshing our approach

Central cross-system capability in SWA is small but able to deliver high quality IDI analysis alongside pockets of IDI capability in other agencies. There are some data gaps and delay in getting data into the IDI which hampers high quality and timely output. To make progress for social investment we need to improve our data system infrastructure. This needs sustained effort and investment across the 'data pipeline'. We already have a solid base of enablers and infrastructure to build on, and we know where attention is needed.

There are also some known gaps in our practices and capabilities that will need to be rebuilt or developed as we re-introduce the social investment approach, including our knowledge about what works for what people, advanced analytics, and any requirements to administer funding.

Our 2021-23 strategy focused on providing value to government agencies by aligning our work programme to government priorities and supporting cross-agency programmes of work where there were significant opportunities to make a difference for New Zealanders. These opportunities remain, and there is an immediate opportunity to refresh our approach and/or mandate to support your vision. You can refresh our mandate with Cabinet agreement.

Upcoming decisions

There are no upcoming decisions that urgently require your attention.

Our Strategic Intentions document, which outlines our strategic direction for the next four years, is currently scheduled to be published by 1 February 2024 as required by the Public Finance Act. Our strategic intentions document is incorporated into Te Kawa Maataho Public Service Commission's *Strategic Intentions 2025-2028*. We will work with you to finalise this before we can publish it.

Further briefings

We would like to talk further with you about social investment, in particular, your priorities and your ambition and pace for the change you want to achieve.

We can also discuss changing our name back to the Social Investment Agency, if required, and this could be an immediate action we can undertake relatively quickly.

To understand your vision for social investment, we propose a number of meetings with you, including other relevant agencies, as appropriate. Some topics for those meetings could include how we implement the social investment approach, how it is governed, key milestones and the data and infrastructure environment and the tools required.

This would ensure that we understand and align with your goals for the portfolio and ensure our activities are focused on delivery.

Current appropriations

We are funded through an appropriation in Vote: Public Service (Supporting Implementation of a Social Wellbeing Approach). This appropriation is intended to achieve the provision of strategic cross-system advice and support, and insights, tools, and practices in order to implement the social wellbeing approach to support and further the long-term wellbeing of New Zealanders.

We have improved the visibility and impact of our work while managing a decreasing baseline and increased costs. We are working through how we manage this while considering how we contribute to savings targets in the public service.

The table below shows our budget and our non-financial performance measures. We also have a set of performance measures that align to our 2021-23 organisational strategy that we monitor internally.

As a Departmental Agency, our accountability requirements are included in Te Kawa Maataho Public Service Commission's strategic intentions publication and its annual reports.

	2022/23	2022/23	2023/24
<i>Title and scope</i>	<i>Budget</i>	<i>Actual</i>	<i>Budget</i>
<i>Supporting implementation of a social wellbeing approach</i> Providing strategic cross-social-system advice and supporting cross-system work, creating insights, tools, and practices to support sector-wide implementation of a social wellbeing approach.	\$7,181,000	\$7,164,000	\$6,758,000

*Our 2017/18 total appropriation was \$16.2 million.

Non-financial performance measures

	2022/23		2023/24
<i>Assessment of Performance</i>	<i>Final Budgeted Standard</i>	<i>Actual</i>	<i>Budget Standard</i>
The satisfaction rating given by the Minister for the quality and timeliness of advice	At least 70%	100%	At least 70%
The percentage of key deliverables agreed with the Minister completed in accordance with organisational priorities and agreed standards will be no less than 85%	85% or higher	100%	85% or higher
The quality of our advice (as assessed annually using the policy project guidelines)	New measure	New measure	At least 75%
Our insights are shared widely (as measured by our publications, presentations, and social media presence)	New measure	New measure	At least 6 publications per year

Our organisation

Chief Executive, Te Tumu Whakarae

Renee Graham

Renee's career has been focused on leading change through policy and evidence in the social sector. Prior to this role she was Secretary for Women and Chief Executive of the Ministry for Women. She has also worked in leadership roles at the Ministry of Education, Ministry of Social Development and Work and Income.

Renee has a Master of Public Policy and Bachelor of Commerce and Administration from Te Herenga Waka, Victoria University of Wellington. Renee is of Ngāti Toa and Ngāti Raukawa descent.



Our chief executive has the same general responsibilities as a departmental chief executive under section 52 of the Public Service Act 2020.

A departmental agency chief executive also has the same powers to carry out their responsibilities and functions as a departmental chief executive under Schedule 6 of the Act (see section 5 of the Public Service Act 2020).

Deputy Chief Executive, Policy, Data and Insights

Aphra Green

Aphra brings experience from across the social and justice sectors, having held senior leadership roles in Oranga Tamariki and the Ministry of Justice.

Aphra has a Master of Laws and a Post-Graduate Certificate in Public Policy.



Policy, Data and Insights brings together the capabilities we need to use data and analytics to create tools, insights and advice for decision-makers. Its functions include advanced analysis using the IDI, data infrastructure and tools, and insights creation and visualisation.

Deputy Chief Executive, Strategy and Performance

Alistair Mason

Alistair has been with the Social Wellbeing Agency since its inception, holding a variety of roles across the organisation. Prior to joining the Agency, Alistair was Ministerial Advisor for a variety of Ministers, primarily covering social portfolios.

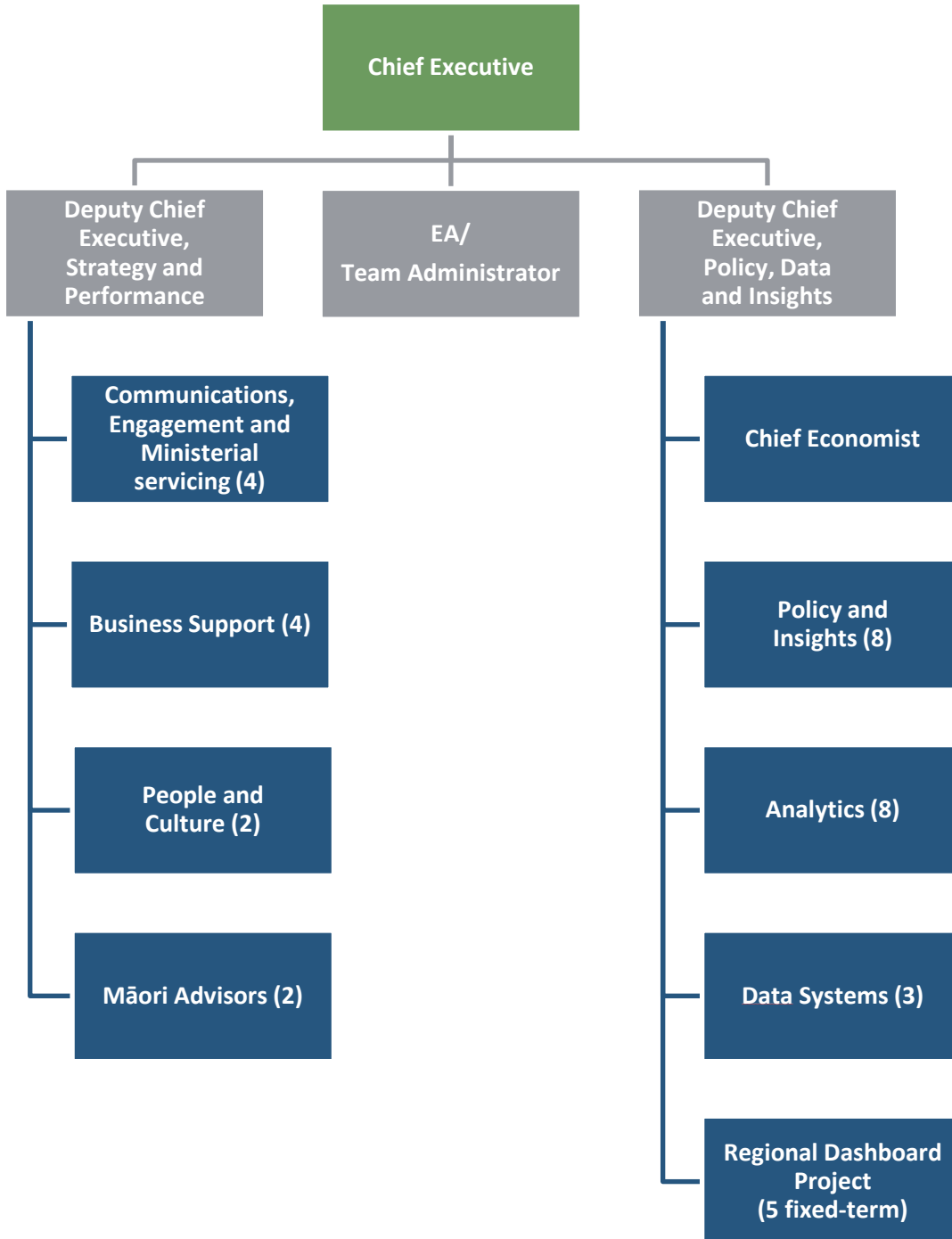
Alistair also has an extensive background in public relations, having worked for some of the world's leading public relations firms in London, Hong Kong, the UAE, and Wellington.



Strategy and Performance leads the provision of strategic advice and the delivery of organisational and capability plans. It ensures high quality and fit-for-purpose support to Ministers, as well as providing secretariat functions. Its functions include the management of SWA's corporate functions.

Our agency organisation chart

Our agency has 41 staff (as at 30 October 2023). The diagram below shows our two groups: Strategy and Performance, and Policy, Data and Insights, and the functions within these groups.



Key staff and contact details

Name	Title	Contact
Renee Graham	Chief Executive	9(2)(a)
Aphra Green	Deputy Chief Executive, Policy, Data and Insights	
Alistair Mason	Deputy Chief Executive, Strategy and Performance	
Luke Scullion	Private Secretary	
Pip Te Hira-Matatia	Chief Māori Advisor	
Andrew Webber	Chief Economist	
Rebecca Hollingsworth	Manager, Policy and Insights	
Louise Pirini	Manager, Analytics	
Tahia Eaqub	Manager, Data Systems	
Kirsty Anderson	Manager, Communications and Engagement	
Robin Van Ausdall	Principal Portfolio and Planning Advisor	