



# Social Investment Fund

# Application Guide for organisations

## Pathway Two: Contract Consolidation

This guide provides information for you on how to navigate the EOI step in the application process.

If you are longlisted, further guidance will be provided to you about submitting further documentation.



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# Overview and timeframes

# Fund Overview

## What is the Social Investment Fund?

In April 2025, Cabinet established the Social Investment Fund (the Fund) which will:

- invest early to help New Zealanders overcome a range of challenges to achieve their goals
- work in partnership with social sector organisations, iwi and other agencies
- enable us to test, demonstrate, and scale the social investment approach
- focus on priority outcomes and cohorts agreed by Ministers.

Read more information on the SIA website about the [Social Investment Fund](#), the [Social Investment Agency](#) and the [social investment approach](#). See Appendix B for further resources.

## What is the scope of the Fund?

The Social Investment Fund contains four investment pathways, each designed to support the Government’s social investment priorities and improved social outcomes.

<p><b>Pathway One: New Investment</b></p> <p>The commissioning of evidence informed innovative services and programmes that exemplify the social investment approach and align with priority groups and outcomes</p>	<p><b>Pathway Two: Contract Consolidation</b></p> <p>Social sector organisations can request the consolidation of multiple contracts across several agencies into one or more outcomes-based agreements, simplifying administration and focusing on measurable outcomes.</p>
<p><b>Pathway Three: Community commissioning</b></p> <p>A model where decision-making authority for social service investment is devolved to local leaders, empowering communities to tailor solutions to their specific needs.</p>	<p><b>Pathway Four: Co-investment</b></p> <p>Partnerships with philanthropic organisations or other funders to co-invest in initiatives that amplify collective impact and drive innovation.</p>



## What are the priority outcomes?

The Fund aims to support measurable improvements across key outcome domains that align with the Government's priorities (the nine Government Targets, the Child and Youth Strategy and the Employment Action Plan). By focusing on these broad domains, the Fund will invest in initiatives that both help people and families to achieve their goals and support the achievement of Government's broader objectives. These domains include:



### 1. Improved Health

Reducing serious health events and preventing hospitalisations that are potentially avoidable.



### 2. Greater Safety

Reducing the need for children to be placed in state care, as well as decreasing rates of violent crime, youth crime, family violence and sexual violence.



### 3. Ensuring stable and secure housing

Reducing the need for emergency housing.



### 4. Improving knowledge and skills

Improving attendance in education and supporting the attainment of qualifications.



### 5. Growing income and wealth

Enabling individuals to achieve higher incomes, improving financial security and wealth over time.



### 6. Supporting people into work

Increasing employment and reducing reliance on the benefit.



# Contract consolidation pathway

## Overview

**The Contract Consolidation (CC) pathway is focused on the consolidation of existing contracts held by social sector or community organisations with one or more central government agencies into a single outcomes-based agreement, administered by the Social Investment Fund.**

A first round of expressions of interest will be open on 1 September 2025.

The key components of this outcomes-based agreement are that it:

- Is held between the social sector or community organisation and the Social Investment Agency (SIA), the agency responsible for the Social Investment Fund
- Has a term of four years
- Includes allowance for annual funding increases
- Specifies the cohort (population group) which the social sector or community organisation will focus on
- Contains an evaluation approach which is agreed to by the organisation and SIA.

Consolidated contracts awarded under this pathway will not exceed the value of the pre-consolidation contract values.



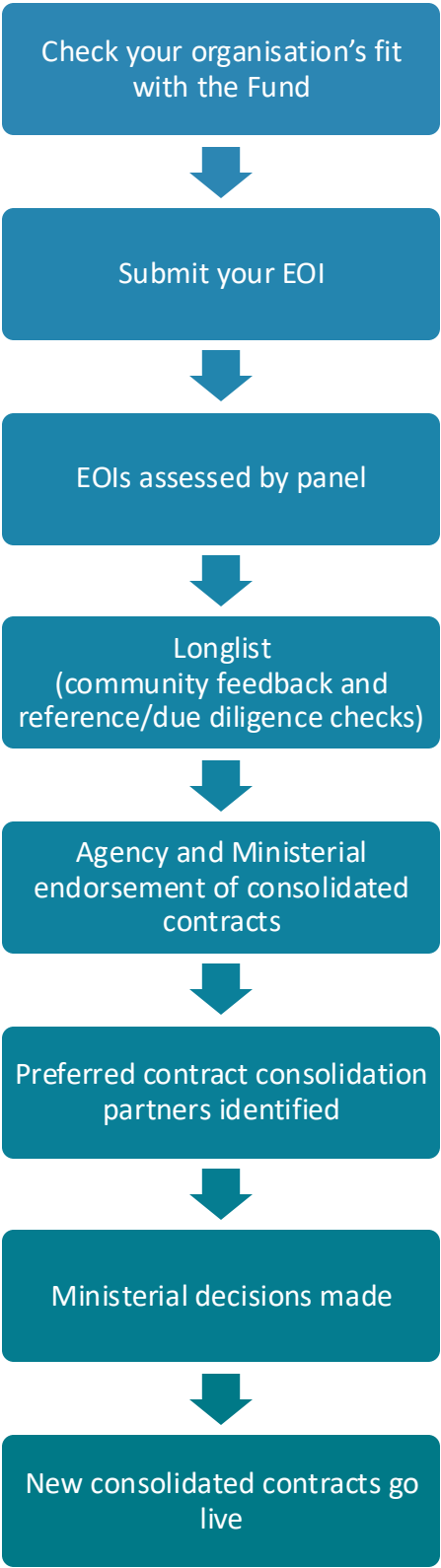
The benefits to social sector organisations are expected to come from:

- Stability of longer contract terms.
- Reduced administrative and compliance burden using a single agreement with simplified reporting requirements.
- Built in basic annual funding increases.
- Greater flexibility in service delivery with organisations able to deliver against a single theory of change for an identified cohort. Organisations are empowered to evolve their services as the needs of the people they work with change and both parties learn more about what works for the target cohort, within the evaluation approach.
- Shared learning between organisations and SIA, including access to de-identified cohort and community data and insights demonstrating the impact of an organisation's services for the communities and people they work with.

You may have heard about 'priority cohorts' that have been set for round one of the New Investment Pathway. Organisations applying for Contract Consolidation do not need to be working with those priority cohorts to submit an expression of interest.



# Pathway stages



# Key Timeframes

Below are anticipated key timeframes for the EOI process, including shortlist notification timeframes.

Date	Item
1 September 2025	EOI applications open for submission via the online portal
3 October 2025	Final date for organisations to submit questions regarding the EOI process
13 October 2025	EOI submissions close
Mid November 2025	Longlist published for community feedback  Engagement with longlisted organisations and relevant agencies to complete due diligence
December 2025	Preferred Contract Consolidation partners recommended to Social Investment Fund Ministers
Jan-March 2026	Ministerial decisions on Contract Consolidation
July 2026	New consolidated contracts in place

## Who can apply to the Fund?

We partner with organisations delivering health and social services across New Zealand. This includes:

- Registered charities and not-for-profit organisations
- Iwi and Māori organisations
- Whānau Ora providers
- Pacific organisations
- Community groups and trusts
- Social enterprises focused on health and social outcomes
- Other organisations with a primary purpose of delivering health and social services



To be eligible, organisations must be legal entities in New Zealand that can enter into contracts and have systems to safely collect and share participant information. We're committed to working with organisations at different stages of capability and we will support successful applicants to meet our data requirements and evaluation approach.







# **Check your organisation's fit**

# Considerations before you apply

## Have you completed the pre-application checklist?

Before you apply, we recommend you read the following information on the [Pathway Two: Contract Consolidation](#) page of the SIA website to identify whether this round might be suitable for your organisation:

- ☐ Read about the priority outcomes for this funding round
- ☐ View the Contract Consolidation Assessment Framework

## Are you within the scope of contract consolidation round one ?

The proposed scope for the first round of Contract Consolidation will be organisations that:

- provide government social services funded by central Government
- have more than one central government contract to deliver services that support the same cohort of people
- are willing to share the minimum data set required for evaluation with Stats NZ and input data to the IDI
- want to shift to a more flexible, outcomes based contracting model.

**Out of scope** for the first round will be:

- organisations that want to consolidate contracts that are held by local government, and
- organisations who do not have either the capacity, capability, or willingness to partner with SIA to develop the components of the evaluation framework (i.e. a Theory of Change, learning and impact approach, clear cohort they work with etc.)

We are unlikely, in round one, to progress consolidation where all contracts are held with a single agency. We would still be interested in hearing from your organisation if you hold multiple contracts with a single agency which you would be interested in consolidating. This information will help inform future contract consolidation rounds, advice to Ministers, and advice to other agencies on where contract consolidation opportunities exist.

For more information data sharing and learning, refer to the [Data, learning and impact for the Social Investment Fund](#) Quick Guide.



## Have you reviewed the Contract Consolidation Assessment Framework?

It may be helpful for you to review the Contract Consolidation assessment framework (Appendix A) well ahead of the EOI close date and prior to completing your application through the online portal.



Successful consolidated contract EOIs will be developed into outcomes-based agreements. These will be expected to have clear outcome(s), cohort(s), and delivery linked to a well-developed and evidenced theory of change, with elements of continuous learning and evaluation.

Refer to the Social Outcomes Agreement and Initiative Schedule Templates on the SIA website for an indication of the approach and type of agreement you can expect to have if successful.

Appendix B includes the link to quick guides for further information regarding some areas of the assessment framework (e.g. outcomes).

## Does your organisation meet the pre-conditions?

Each organisation will be required to meet all the pre-conditions below for their proposal to be evaluated. Pre-condition evidence will not be required during the EOI stage. However, if your organisation is longlisted, evidence will be collected.





# **Application process**

# Round One EOI application process

## Accessing the application portal

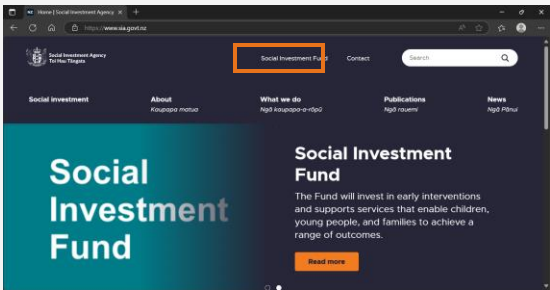
The application process is run through our online application portal. A link to the portal is available on the [Pathway Two: Contract Consolidation](#) page of the SIA website, [sia.govt.nz](http://sia.govt.nz).

To find this page on the SIA website, click on the Social Investment Fund link at the top of the homepage, then click on the Pathway Two page. The link to apply will be visible on the page.

1. Go to the SIA website:  
[www.sia.govt.nz](http://www.sia.govt.nz)

2. Select “Social Investment Fund”  
at the top of the homepage

3. Select the link to the Pathway  
Two page



## Getting started

When you click on the link, it will take you to the application portal. Select the Contract Consolidation application option to begin your application.



## Saving your application as you go

Once you have passed the pre-registration eligibility portion of the application in the online portal, you will be able to save and leave your application whenever you need. Simply press save and exit the site. You will receive an email with a link that you can use to re-enter your application.

If you have any issues with the portal, please contact: [info@sia.govt.nz](mailto:info@sia.govt.nz)





## Step 1. Complete pre-registration eligibility



You will be prompted to answer the pre-registration questions to determine if you are eligible for Round One of the Contract Consolidation pathway. Please fill in the fields or use the drop-down options as prompted.



When your answers to qualifying questions are completed you will be informed whether you are eligible for this round of Contract Consolidation funding. If you are eligible, the system will take you through to the registration portion of the application.

If you are not eligible for this round of funding, you will be invited, if you wish, to provide information on your current contracts to inform our analysis and advice for future rounds.

The registration pre-conditions are outlined on the next page.





## Registration pre-conditions

Application pre-conditions	
1.	<p><b>Working with SIA:</b> Is your organisation willing to enter into a consolidated contract administered by the Fund which includes:</p> <ul style="list-style-type: none"> <li>• A jointly agreed theory of change</li> <li>• A commitment to shared learning through feedback loops</li> <li>• A commitment to adaptive management</li> <li>• A jointly agreed evaluation approach</li> </ul>
2.	<p><b>Data sharing:</b> Does your organisation agree to share the following data with Stats NZ's Integrated Data Infrastructure (IDI) for the service?:</p> <p><u>Personal identifier(s):</u> Sufficient information for Stats NZ to identify an individual, such as an NHI number (if already collected); or a name, gender and date of birth. This data is used only by Stats NZ for linking in the IDI and is not shared with the Fund.</p> <p><u>Start date:</u> The date the individual began working with your organisation</p> <p><u>Exit date:</u> The date the individual ceased working with your organisation</p>
3.	<p><b>Cohorts:</b> Is your organisation proposing to consolidate contracts for services which are delivered to the same, defined population group (cohort)?</p>
4.	<p><b>Outcomes:</b> Is your organisation proposing to consolidate contracts for services which contribute to at least one of the agreed social investment outcomes?</p>
5.	<p><b>Legal status:</b> Is your organisation a legal entity in New Zealand? (Evidence could include an NZBN or other equivalent legal documentation).</p>
6.	<p><b>Authority:</b> You confirm that you have the have authority on behalf of your organisation to submit this application and be the contact for any potential questions we might have.</p>
7.	<p><b>Due diligence and reference checks:</b> Upon submission of this application, SIA will conduct due diligence checks on the application and/or my organisation and may use the information for evaluation purpose. If this application is progressed to shortlisting, the government departments and/or agencies that hold existing funding contracts with my organisation may share with SIA details and/or copies of the contracts my organisation has with them.</p>





## Step 2. Complete EOI submission sections

Once you have completed the eligibility portion of the application, you should automatically be able to begin populating the remainder of the EOI sections.

You will be guided through a series of questions in the online portal over multiple pages. For this section, please be aware that:

- It is important that you have the authority on behalf of your organisation(s) to submit this application. **If you do not have the authority, your application will not proceed.**
- If your application is moved through to the longlist stage, **your organisation(s) name will be published** alongside your proposal summary and the location your proposal will be delivered in, for community feedback.

Please refer to the table below for further information or quick links relevant to the sections of the EOI.

Section	Information
Registration	In this section we are seeking to understand more about your organisation such as legal entity information and contact information. If you cannot confirm that you have the authority to submit the application on behalf of your organisation, you will not be able to proceed with the remainder of the application.
Current Contracts	In this section we are seeking an overview of your current contracts.
Proposal	You will be prompted to provide a brief outline of your organisation's proposal e.g. "we seek [A] funding to deliver [B] outcome(s) to impact [C] cohort in [D] location." <b>Please note, this summary will be published on SIA's website if your proposal is longlisted.</b>





## → Step 3. Submit application

When you have answered all required areas of the application you will reach a page where you can submit your application form. At this stage, please ensure that you have reviewed your answers prior to submission as you will be unable to make amendments when the form has been submitted.

You will be prompted to complete a declaration prior to submitting your EOI. As part of this declaration, you must review and approve our Terms of Use. These are available on our website.

Upon submission you will receive confirmation of your submission, your application number and who you can contact regarding your application.

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### Next steps

If your application is longlisted, you will be provided with further guidance on the next steps in the process and given details on how to submit your due diligence documentation.

If you have any queries, please first read our prepared Frequently Asked Questions (see Appendix B). If you cannot find the information you are looking for through the FAQs or our quick guides, then please contact: [info@sia.govt.nz](mailto:info@sia.govt.nz)

### Thank you

We greatly appreciate the time you have taken to engage with this process.

This is our first Contract Consolidation funding round. We can only invest in a small number of demonstration initiatives to help us test and scale the social investment approach at pace. However, this work will pave the way for changes that will benefit the wider social sector.

There may be future rounds and there are other Fund pathways. Please stay in touch with us, even if you are not the right fit for Round One.

The Social Investment Fund is designed to work differently to ensure government, the social sector and other partners can work smarter to make a positive difference in the lives of New Zealanders. We've heard from the sector that they want to work differently with government, and we're committed to doing that through the Fund.

Ngā mihi nui





# Appendices

# Appendix A: Assessment Framework

## Social Investment Fund Assessment Framework for Contract Consolidation (part one)

Criteria	Description	Low (1)	Medium (2)	High (3)
<b>Benefit / value</b>	<p>What is the likely level of:</p> <ul style="list-style-type: none"> <li>Benefit to the cohort an organisation works with (will there be greater flexibility to respond to need? Does it reduce complexity in accessing services?)</li> <li>Benefit to the organisation (potential saving in personnel time, financial savings, opportunity for better practice)</li> </ul>	<p>The proposal includes high level statements about the benefit to the organisation of contract consolidation but does not articulate any benefit to the individuals supported by the service.</p> <p>The benefits presented in the proposal are minimal.</p>	<p>The proposal outlines some benefit to individuals based on changes to practice (e.g. redesigned referral pathways, changes to the scope of services provided).</p> <p>The proposal also outlines some benefit to the organisation, likely savings in personnel time or financial resources, due to improved practices or operational efficiency which are grounded in reasonable changes to service delivery / ways of working.</p>	<p>The proposal outlines significant benefit to individuals based on the organisations ability to engage in tailored and adaptive services, reduced complexity of referral pathways, and enhanced flexibility within the agreement.</p> <p>The proposal also outlines reasonable benefits to the organisation, likely savings in personnel time or financial resources, due to improved practices or operational efficiency.</p>
<b>Outcomes</b>	Is there a clear, defined outcome or outcomes that are aligned with the priority outcomes agreed by Social Investment Ministers?	<p>The proposal includes high-level statements on outcomes. There is an opportunity to build on this foundation by identifying specific, measurable outcomes.</p>	<p>The proposal outlines specific, measurable outcomes that are well aligned with one priority outcome or reasonably aligned with multiple priority outcomes.</p>	<p>The proposal identifies specific, measurable outcomes that align strongly with several priority outcomes, as well as other outcomes participants value.</p>
<b>Cohorts</b>	Is there a clear, defined, and evaluable cohort(s)?	<p>The proposal demonstrates limited understanding of what population group that will be supported by the initiative, OR</p> <p>The proposal is to offer a universal service which makes comparison not feasible, OR</p> <p>The proposal is to work with a population group which the organisation does not currently support and limited information has been provided on how the organisation will engage the new group.</p> <p>It is unclear how the initiative will reach more than 250 participants over the course of the programme.</p>	<p>The proposal is clear on the priority cohort(s) the organisation intends to reach and there is a credible plan for reaching and working with a priority cohort(s).</p> <p>It is likely that the initiative will reach more than 250 participants over the course of the programme.</p>	<p>The proposal demonstrates the organisation's track record of working with the cohort(s) they specify and includes referral pathways agreed with partners.</p> <p>The initiative will likely easily reach enough of the cohort(s) to enable a robust evaluation.</p>



# Appendix A: Assessment Framework (continued)

## Social Investment Fund Assessment Framework for Contract Consolidation (part two)

Criteria	Description	Low (1)	Medium (2)	High (3)
Risk	<p>How likely is it that an organisation is capable of managing risks of disruption to service continuity or delivery? Does it have the resources and processes to manage engagement with the contract consolidation process?</p> <p>Does the proposed contract consolidation pose challenges to SIA by featuring:</p> <ul style="list-style-type: none"> <li>• A high number of distinct agencies.</li> <li>• A high number of contracts.</li> <li>• Multiple distinct cohorts being supported across contracts.</li> <li>• Multiple outcomes sought across contracts.</li> <li>• Service delivery in area of potential serious high harm to the cohort supported.</li> <li>• Service delivery in an area highly governed or regulated by law.</li> </ul>	<p>The organisation has articulated a clear understanding of the potential risks of consolidation and a set of mitigations or plans to manage those risks. These plans include robust resources, systems, and processes in place to effectively handle engagement in the contract consolidation process.</p> <p>The proposed consolidation also involves:</p> <ul style="list-style-type: none"> <li>• A lower number of distinct agencies.</li> <li>• Contracts covering a narrow range of outcomes and cohorts.</li> <li>• Service delivery in areas with minimal risk of serious harm to clients.</li> <li>• Service delivery in areas with low levels of governance or legal regulation, reducing complexity and risk.</li> </ul>	<p>The organisation has identified some high-level risks and mitigations, however these lack detail and do not cover all potential areas of risk. There is limited detail provided on the organisations resourcing and processes to manage these risks during the consolidation.</p> <p>The proposed consolidation involves:</p> <ul style="list-style-type: none"> <li>• A moderate number of distinct agencies.</li> <li>• Contracts covering a broader range of outcomes and / or cohorts.</li> <li>• Service delivery in areas with moderate risk of serious harm to clients.</li> <li>• Service delivery in areas subject to moderate governance or legal regulation, requiring careful management to mitigate risks.</li> </ul>	<p>The organisation has not identified any meaningful risks or mitigations. No information has been provided on the organisations resourcing or processes to manage risks during the consolidation.</p> <p>The proposed consolidation involves:</p> <ul style="list-style-type: none"> <li>• A high number of distinct agencies, creating significant logistical challenges.</li> <li>• Contracts covering multiple outcomes and diverse cohorts, making consolidation highly complex.</li> <li>• Service delivery in areas with high potential for serious harm to clients, requiring careful and sensitive management.</li> <li>• Service delivery in areas highly governed or regulated by law, adding layers of complexity and risk that may be difficult to navigate.</li> </ul>



# Appendix B: Resources

Refer to the SIA website [www.sia.govt.nz](http://www.sia.govt.nz) for information and resources to help you prepare your application. Here is an outline of the resources you can find on each page on the website.

## Information about the Social Investment Fund

The [Social Investment Fund](#) page has the following information:

- Links to the four pathway pages
- FAQs about the Social Investment Fund [Social Investment Fund FAQs](#)
- Information about [Webinars](#)
- Links to Fund pages:
  - [Demonstration initiatives](#)
  - [Register your interest for Fund updates](#)
- Factsheets:
  - What is social investment?
  - About the Social Investment Agency
  - Demonstration initiatives

## Information about Pathway Two: Contract Consolidation

The [Pathway Two: Contract Consolidation](#) page has the following information:

- **Online EOI Application Form link**
- Information about Pathway Two
- Application Guide (this document)
- Key dates
- Resources like Quick Guides and application form templates
- About the Social Investment Fund

## More information about social investment

For more information on social investment, see:

- [What is social investment?](#)
- [Social investment FAQs](#)

