Social Investment Agency
Toi Hau Tāngata

SOCIAL INVESTMENT FUND

Summary of key changes to the Social Outcomes Agreement and Initiative Schedule templates

Key information: Summary of key changes to the Social Outcomes Agreement and Initiative Schedule templates

Date 25 August 2026

Introduction

This document summarises the main changes to the latest Social Outcomes Agreement and New Investment Initiative Schedule templates.

The Social Investment Agency has updated the templates based on what we have learned from using outcomes-based agreements and feedback from partner organisations. The updated templates make roles, responsibilities, data use and practical processes clearer. They keep a high-trust, relationship-based approach that supports people, whānau and communities to achieve positive outcomes. Some operational detail has moved into supporting documents, such as schedules and initiative-specific plans. This keeps the agreement clear, flexible and fit for different initiatives.

Summary of changes

	What has changed	Why has it changed	What this means in practice
People and roles	Key roles and terms, such as Agreement Leads and Initiative Leads, are clearer and more consistent.	This reduces confusion about who is responsible for what, especially when one agreement covers several parties or initiatives.	It should be easier to see who to contact, who makes decisions and how responsibilities are shared.
Multiple initiatives	The agreement now explains how it works when more than one initiative sits under the same agreement. It also explains how	This avoids uncertainty when initiatives under the same agreement have different timeframes or needs.	One initiative can end without automatically ending the others. Agreed changes can apply to all initiatives or

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	changes or ending an initiative affect each initiative.		only to a specific initiative.
Notification requirements	Delivery approach and subcontracting changes added as examples of material changes.	To give earlier visibility of changes that may affect delivery, assurance or risk.	Expectations are clearer as to when a notification might be made.
Data, Data Sharing Agreement (DSA) and IDI	The agreement makes it clearer that the DSA is subject to the Government Statistician. It also explains the purpose of data collection, including official statistics or research where approved.	To make the data pathway more transparent and to better explain the role of Statistics New Zealand and the Government Statistician. Partner feedback and recent public sector reviews showed we need to explain data use, decision-making and safeguards more clearly.	Partners should better understand why data is collected, how Statistics NZ is involved, and how IDI data may be used for research and evaluation.
Privacy	Agreement refers to Participants, legal guardians and primary caregivers, and more explicitly links awareness of data sharing to official statistics, insights and research in social investment and the social sector.	The privacy wording is more precise about who needs to be informed and why the data may be shared.	Clearer expectations support partners and the people they support to make informed choices.
Audit (Clinical option)	Adds optional Clinical Audit wording for clinical services, including standards, clinical records, observation, and participant/whānau interviews with consent, where relevant.	To provide stronger assurance options for initiatives involving clinical services or clinical risks.	The template can now be adapted for clinical services where additional assurance is needed. This clause would only be included where relevant.
Termination and wind-down	Adds more detailed treatment of evaluation costs, unspent funds, capital items and partial termination of initiatives.	This reduces uncertainty about the financial and operational considerations if an agreement or initiative ends early.	There is more clarity about what happens financially and operationally if an initiative or agreement ends early.
Financial management	The agreement adds pay equity settlement expectations and prior approval for capital items and unspent funding.	This clarifies expectations about how funding is managed and when approval is needed.	Partners should seek approval before using funding for capital items or carrying forward unspent funding, where applicable.

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Portal use	New addition on the use of a web-based portal for working with SIA.	The Agency has developed and launched a new online system.	Partners will have greater transparency and access to shared notes, agreed actions and the ability to raise and record questions or issues.
Records at the end of an initiative	Agreement adds that each party will take reasonable steps to delete or destroy data or information supplied by the other party when no longer reasonably needed, subject to exceptions including IDI-integrated data and relevant legislation.	This responds to feedback that the agreement should be clearer about what happens to information and data after an initiative ends.	There is now clearer wording about what happens to data and information after it is no longer needed, while recognising that IDI data and public records/privacy/statistics requirements may still apply.
Subcontractors	The agreement now asks for a subcontractor's New Zealand Business Numbers and explains Te Kāhui Kāhu's role more clearly.	This helps check subcontractor accreditation status more efficiently.	Organisations remain responsible for their subcontractors. Subcontractors must meet the same core obligations under the agreement.
What sits in the Schedule and agreement	The Schedule now shows that many operational details sit in supporting documents, such as the Theory of Change and Learning and Impact Plan, instead of being repeated in the agreement.	This avoids duplication and keeps the agreement flexible, while still recording expectations clearly.	Organisations will see fewer operational details in the agreement. Initiative-specific detail will be set out in supporting documents referenced in the Schedule.
Evaluation	Additional provisions set out what evaluation will assess and what the Learning and Impact Plan will include.	This responds to feedback that the agreement should be clearer about what evaluation will include and how the Learning and Impact Plan is agreed and developed.	Organisations can consider evaluation from the start, using the baseline information provided.

Additional information about how we will work together is available at Outcomes Agreement Guidance for Organisations | Social Investment Agency.