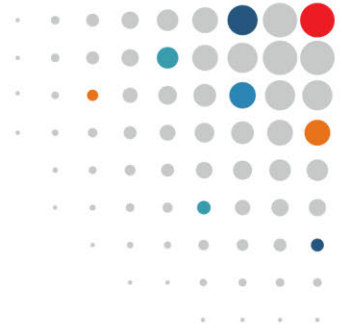




13 March 2025

File Ref:2024028

9(2)(a)

Thank you for your Official Information Act 1982 request, received on 13 January 2025. You requested:

I would like to request a copy of the following reports which are listed on your website but do not have any link or file attached to them

- SIA242562 - Briefing: Social Investment Fund Purpose and Design Principles
- SIA242539 - Briefing Design of Social Investment Fund

I would also like to request copies of all of the fortnightly provided between the dates of 2 August 2024 and 13 January 2025.

On 11 February we extended the timeframe for responding to your request by 20 working days because the consultations necessary to make a decision on your request were such that a proper response to your request could not reasonably be made within the original time limit.

SIA has identified 20 documents in scope of your request, as detailed in the attached Document Schedule. Please note, some information has been withheld under the following sections of the Act:

- | | |
|-------------|--|
| 9(2)(a) | to protect the privacy of natural persons, including that of deceased natural persons; |
| 9(2)(f)(iv) | to maintain the constitutional conventions for the time being which protect the confidentiality of advice tendered by Ministers of the Crown and Officials; and |
| 9(2)(g)(i) | to maintain the effective conduct of public affairs through the free and frank expression of opinions by or between or to Ministers of the Crown or members of an organisation or officers and employees of any public service agency or organisation in the course of their duty. |

Regarding section 9(1) of the OIA, I do not consider that the withholding of this information is outweighed by public interest considerations in making the information available.

If you are not satisfied with this response, you have a right to seek an investigation or review by the Ombudsman. Information about how to make a complaint is available at www.ombudsman.parliament.nz or by calling 0800 802 602.

As part of our commitment to transparency, we proactively release our responses to information requests where possible. This response, with your personal details removed, may be published on our website shortly.

Yours sincerely

A handwritten signature in blue ink, appearing to read 'K. Anderson', with a stylized flourish at the end.

Kirsty Anderson

Communications, Engagement and Ministerial Manager

Document Schedule

Documents released

#	Date	Description/Title	Withholding grounds
1	2 August 2024	SIA24/25-038 - Fortnightly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
2	16 August 2024	SIA24/25-041 - Fortnightly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
3	30 August 2024	SIA24/25-041 - Fortnightly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
4	30 August 2024	Annex one to Fortnightly Report: Impact Review – Initial insights for Minister	-
5	13 September 2024	SIA24/25-073 - Fortnightly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
6	27 September 2024	SIA24/25-083 - Fortnightly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
7	4 October 2024	SIA24/25-098 - Weekly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
8	11 October 2024	SIA24/25-106 - Weekly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
9	18 October 2024	SIA24/25-108 - Weekly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
10	25 October 2024	SIA24/25-117 - Weekly Report	9(2)(a), 9(2)(f)(iv)
11	1 November 2024	SIA24/25-122 - Weekly Report	9(2)(a), 9(2)(f)(iv)
12	8 November 2024	SIA24/25-126 - Weekly Report	9(2)(a), 9(2)(f)(iv)
13	15 November 2024	SIA24/25-127 - Weekly Report	9(2)(a), 9(2)(f)(iv)
14	22 November 2024	SIA24/25-130 - Weekly Report	9(2)(a), 9(2)(f)(iv)
15	29 November 2024	SIA24/25-134 - Weekly Report	9(2)(a), 9(2)(f)(iv)
16	6 December 2024	SIA24/25-140 - Weekly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
17	13 December 2024	SIA24/25-143 - Weekly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)
18	20 December 2024	SIA24/25-144 - Weekly Report	9(2)(a), 9(2)(f)(iv), 9(2)(g)(i)

Documents withheld in full

#	Date	Title/description	Withholding grounds
19	5 September 2024	SIA24/25-062 Briefing: Social Investment Fund Purpose and Design Principles	9(2)(f)(iv)
20	2 August 2024	SIA24/25-039 Briefing: Design parameters for Social Investment Fund	9(2)(f)(iv)



Social Investment Agency
Toi Hau Tāngata

Fortnightly Report Week Ending 2 August

To: Hon Nicola Willis
Minister for Social Investment



Priorities

The Social Investment Agency works to support your priorities to:

- set standards, establish the data and evidence infrastructure and develop new ways of working to deliver social investment
- roll out a programme to evaluate areas of existing social sector spending to better understand the return New Zealanders are getting from current social sector spending
- make sufficient progress early in this term to allow Budget 2025 to have a significant focus on social investment, if agreed.

We are also focused over the next quarter on supporting you to implement the changes set out in your recent Cabinet paper, including:

- establishing the Social Investment Board
- supporting the Social Investment Ministerial Group
- 9(2)(f)(iv) [REDACTED]
- jointly reporting back to Cabinet with StatsNZ by 1 October on data and evidence infrastructure needs for social investment.

Key actions from previous Agency meeting

None outstanding.

Governance and coordination of social investment

Upcoming Cabinet papers

9(2)(f)(iv)

Data and evidence infrastructure Cabinet paper

We propose to brief you and Minister Bayly next week to gain your direction and views on the data and evidence infrastructure Cabinet paper. In advance of that, Minister Bayly has requested a meeting with Social Investment Agency officials, which is scheduled for Monday 5 August.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment Board

Following Cabinet approval of the Social Investment Board's Terms of Reference, we have started seeking expressions of interest for Board membership. It is being publicised widely, and we have already had a lot of interest. As part of this process, you have sent letters seeking nominations from your Ministerial colleagues and coalition party leaders. This process will close on Sunday 11 August.

We expect to provide a short list of potential board members to you for your feedback on or around 14 August.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy Data and Insights

Recent and upcoming engagements

Advice on engagement and bringing a range of perspectives to our work

You have asked for advice on how we might engage more systematically with a range of stakeholders on our work – and also to support you to do the same. We are considering the best way to continue to bring key voices and technical expertise to bear on our work, for example through technical reference groups and regular forums. We will brief you on this in the next fortnight.

Recent engagements

Last week we had stakeholder meetings with the Chief Science Advisors, the Co-Chairs of Te Pūkotahitanga (the tangata whenua Ministerial Advisory Group for the National Strategy to Eliminate FVSV), the Ākina Foundation, New Zealand Council of Christian Social Services, Community Housing Aotearoa, the Social Service Providers Association (SSPA) and the New Zealand Society of Actuaries. All are enthusiastic about being engaged and are keen to provide input as social investment develops. SSPA is considering how it can provide a few forums for useful direct discussions with providers on social investment, including for you to speak directly to and hear from providers.

Upcoming iwi engagements

The Iwi Chairs Forum was held this Thursday and Friday in Auckland, hosted by Ngāti Whātua Ōrakei. A workshop session on social investment for a smaller group of Iwi Chairs, facilitated by Willie Te Aho, is scheduled for next Wednesday. We have indicated our availability to be involved in as much of the discussion as they would like.

We are also participating in a workshop session with the Executive Team of Ngāti Toa, have a regular relationship hui with Ngāi Tahu, and continue to meet regularly with Te Hiku o te Ika.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment: standard setting, data and evidence infrastructure and new ways of working

Impact and Value Measurement Standards

Implementation of the standards

We are currently testing the standards in our review of spend and will be reporting back to you on two priority areas in our report this week.

We also met with Chief Science Advisors last week to test the standards with them. Their overall feedback was positive. They stressed the importance of building evaluation capability and measuring the right outcomes. Chief Science Advisors from outside of the social sector also showed a keen interest in applying the standards to their context.

The Social Sector Commissioning and Procurement Committee (comprised of tier 3 and 4 procurement managers across the social sector) invited us to their monthly hui to present the standards. We asked the Committee to consider implementation of the standards in their context and to send us feedback based on their experiences of working/contracting with providers. The Committee is also keen to have us present on other social investment pieces as we progress our work.

We are considering the best mechanisms to support implementation of the standards (eg, Cabinet agreement, via Budget processes etc).

Next standards

We are seeing a need for a range of other standards, including data collection standards, and model standards for outcomes-based commissioning. We will brief you in the next two months on the plan for the next tranche of standards.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment: evaluating social sector spending

Insights on attendance

We have now completed the substantive work looking at the future outcomes of students who are referred to the Attendance Service. At a high level, we are seeing:

- Attendance Service participants experience an increase in their short-term attendance after they get referred, but there is evidence this begins to fade out over the next six months. The attendance increase is not as large as the increase for a matched group of students who are similar in terms of their demographics and their prior attendance history.
- Attendance Service participants go on to have relatively negative outcomes in later life, across educational attainment, employment and income, housing, victimisation and contact with the criminal justice system. For example, only 16% of participants referred because of non-enrolment (and 29% of those referred because of chronic absence) go on to achieve NCEA Level 2. About 5% are in emergency housing by the age of 22 (relative to a population average of 0.4%).
- Attendance Service participants have noticeably worse later life outcomes than those experienced by a group of people we matched them to. This matched group is similar across 98 different demographic and socio-economic characteristics, but may not be the same on aspects we can't observe in the IDI (such as whānau attitudes towards attendance, or the presence of a positive mentor in school or in the community)

We are currently discussing these results with the Education Review Office and the Ministry of Education, who are synthesizing these findings with the results of other analysis, including surveys and interviews of students, whānau, schools and Attendance Service providers. Broadly speaking we are seeing a lot of alignment between the strands of evidence. We expect some advice on preliminary findings and recommendations to be coming to Associate Education Minister Seymour in the next several weeks. We will brief you on the findings at the same time.

Contacts

Andrew Webber, 9(2)(a)
Chief Economist

Aroturuki Tamariki | Independent Children's Monitor analysis

SIA has a cost recovery arrangement with Aroturuki Tamariki | Independent Children's Monitor to support their first annual report on outcomes of the tamariki and rangatahi Māori who have experienced the Oranga Tamariki system, and their whānau.

We have shared initial insights with the ICM from a first tranche of selected employment and education indicators from the IDI. ICM was highly interested in the initial findings. The data indicates that employment and education outcomes are much poorer for Māori adults with experiences of Youth Justice and/or Care and Protection custody, compared to those with lower-level interactions with the system (such as a Report of Concern or Family Group Conference). The data also indicates very low Level 2 educational attainment for Māori 18-year-olds with recent Youth Justice custody or intervention.

The discussion confirmed our approach and we will continue to provide further data and insights on outcomes and experiences across a wide range of domains (such as education, employment, justice, corrections and health) for tamariki and rangatahi Māori who are currently in the system and adults who have now left the system.

We expect this analysis to be a useful input to other work, including in our spending reviews, insights on targets, and in providing advice on when and how to intervene earlier and more effectively in the lives of those who are most vulnerable.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: Initial insights and scope of reviewing the impacts of social sector spend	This will confirm the precise scope within each of the three identified priorities, and provide initial insights based on assessing publicly available information against our Impact Standards.	1 August 2024
Design parameters for Social Investment Fund	This briefing seeks your direction on parameters for the design of your Social Investment Fund prior to the Social Investment Agency progressing detailed design of the Fund.	1 August 2024
9(2)(f)(iv)		
Briefing: Proposed regional visits	This paper suggests potential stakeholder visits for your forthcoming regional visits.	2 August 2024
Briefing: Design of Social Investment Fund	9(2)(f)(iv)	2 August 2024
Briefing: Data and Evidence infrastructure	This will update you on our work on data and evidence infrastructure required for social investment.	8 August 2024
APH paper: Membership of Social Investment Board	This will seek Cabinet's approval of the Social Investment Board's membership, including the Chair.	14 August 2024
9(2)(g)(i)		
Draft Annual Report (to be part of Te Kawa Maataho Public Service Commission's report	This provided a draft of the Agency's Annual Report.	15 August 2024
9(2)(f)(iv)		

OIA requests

Topic / Requester	Comment	Due date
Departmental OIAs		
The Labour Leader's Office has requested all communication between tiers one, two and three regarding Baseline Savings Targets 2024.	A similar request has been sent to your office. We are coordinating to ensure we capture everything for the response.	16 August 2024
The Taxpayers' Union has requested information on Union members.	This has been sent to your office.	16 August 2024
The Taxpayers' Union has requested information on credit card access.	A copy will be forwarded to your office soon. This has been sent to your office.	23 August 2024
A request for information relating to Value Impact and Measurement Standards.	A response is being prepared.	27 August 2024
Ministerial OIAs		
All written and digital, text and/or any other recorded communication between the Minister or her office and any of the managers, staff, volunteers or contractors of the Skylight Trust which mentions ImpactLab or any contact details or employees of Impactlab or its website between 27 November 2023 and 3 May 2024.	A response has been forwarded to your office.	22 July 2024
Copies of the following reports provided to the Minister: Skylight Trust ImpactLab GoodMeasure Report, received 11 April 2024. Blue Light ImpactLab GoodMeasure Report	A response has been forwarded to your office.	26 July 2024
All reports and advice provided to the Minister for Social Investment since Jan 2024.	A response is being prepared.	27 August 2024

Cabinet Papers we have provided comment on

Topic	Comment
MSD sought comment from SIA on proposals in the name of the Minister for Social Development and Employment focused on the government's work programme to reduce benefit dependency. The proposals were presented in two papers: <i>Paper 1:</i> An overview of changes proposed or underway, including seeking decisions on the Traffic Light System, Non-Financial Sanctions and requiring Jobseeker Profiles <i>Paper 2:</i> Detailed information and decisions on the 26-week reapplication process for Jobseeker Support.	We recommended that the proposals outlined in the draft papers would be strengthened if a plan to monitor and evaluate the impact the proposed changes was indicated. We also noted that the papers could be strengthened if other elements of a social investment approach could be more clearly demonstrated. While desired outcomes were clear, other elements of social investment (as included in your social investment checklist) were not well articulated.
Suicide Prevention Action Plan	The paper seeks agreement to release a draft suicide prevention action plan for public consultation. Current activity is guided by the Every Life Matters – He Tapu te Oranga o ia tangata: Suicide Prevention Strategy 2019–2029 and the associated Suicide Prevention Action Plan 2019–2024. With the action plan coming to an end, the intention is for a second action plan to guide suicide prevention efforts during the remaining five years of the suicide prevention strategy. SIA did not have substantive comment on the paper.



Social Investment Agency
Toi Hau Tāngata

Fortnightly Report Week Ending 16 August

To: Hon Nicola Willis
Minister for Social Investment



Priorities

The Social Investment Agency works to support your priorities to:

- set standards, establish the data and evidence infrastructure and develop new ways of working to deliver social investment
- roll out a programme to evaluate areas of existing social sector spending to better understand the return New Zealanders are getting from current social sector spending
- make sufficient progress early in this term to allow Budget 2025 to have a significant focus on social investment, if agreed.

We are also focused over the next quarter on supporting you to implement the changes set out in your recent Cabinet paper, including:

- establishing the Social Investment Board
- supporting the Social Investment Ministerial Group
- 9(2)(f)(iv) [REDACTED]
[REDACTED]
- jointly reporting back to Cabinet with Stats NZ **by 1 October** on data and evidence infrastructure needs for social investment.

Governance and coordination of social investment

Upcoming Cabinet paper

9(2)(f)(iv)

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment Ministers meeting

The Social Investment Ministers Group is next scheduled to meet on **10 September 2024**. We will work with your office to prepare an agenda and relevant papers.

Options for the agenda include (suggest 2-3 items from the below list, with the first three being our recommended items):

- **Impact reviews** – an update on the approach to the reviews of the impact of spend that the Social Investment Agency is leading, possibly with some initial findings
- **Social Investment Fund** – an overview of the parameters being considered for the design of the Fund
- **Showcase an approach to social investment being taken within a portfolio** – Ministers are implementing the framework and may be keen to share and test their approach (eg, Minister of Education)
- **Data infrastructure** – an overview of the plan to improve the data infrastructure needed for social investment (as well as an update from Stats on progress to get data into the IDI). This update could provide an overview of the approach to the planned Cabinet report-back invited by 1 October (we expect to have initial advice to you on this work on week beginning 18 August)
- **Social investment implementation framework** – a (brief) discussion of the implementation framework that the Agency is developing to guide work to implement social investment ('Lead, Build, Do'), building on the work programme Ministers considered at their last meeting.

Based on your feedback, we'll provide you with a draft agenda for discussion at our next officials' meeting.

Contacts	Aphra Green, 9(2)(a) [REDACTED] Deputy Chief Executive, Policy Data and Insights
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Social Investment Board

The EOI has resulted in a substantial amount of interest (258 applications) from a wide variety of people. We have provided you with a briefing with the final full list of applicants, an initial shortlist and next steps.

We are still on track for APH in early September and to have the first meeting of the Board in mid-late September.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy Data and Insights

Recent and upcoming engagements

Last week we hosted representatives from Ngāi Tahu and are discussing an ongoing work programme with them. We also presented on social investment to the leadership team of Te Runanga o Toa Rangatira, with very strong interest in this kaupapa from their leadership

We presented on the Regional Data Tool to the Auckland Regional Leadership Group. The audience included representatives from iwi, Auckland Council and the Tāmaki Makaurau Recovery Office. There was great interest in the tool and also from iwi representatives to work with SIA in the future.

We presented to the Aotearoa New Zealand Evaluation Association (ANZEA) Wellington branch meeting, and met with the Children's Commissioner and the Auditor-General. We have also met with key social investment experts to discuss data infrastructure.

We have also had follow-up conversations with Genesis Youth Trust to learn more about their experience of Social Impact Bonds, and with Ghandi Nivas to understand more about their contracting concerns. Both follow-ups were positive.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment: standard setting, data and evidence infrastructure and new ways of working

Outcomes-based contracting standards

Last week you asked us to progress advice on whether our next set of standards might address perceived issues with contracting and commissioning. You also requested information on a stocktake of contracts in the social sector.

This information has been requested for you from MSD via the Office of the Minister for Social Development in two parts:

- Information and findings from a recent stocktake of contracts
- An overview of social sector commissioning, progress made towards outcomes based contracting and barriers/gaps.

The latter will feed into our advice to you, alongside other information and our views.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Value and Impact Measurement Standards – implementation and uptake

Following the distribution of the Social Investment Checklist and draft Value and Impact Measurement Standards to some government agencies, we have heard that Ministry of Transport is using the Standards to assess the quality of the evidence base that underlies their investment approach. We have offered to support them in implementing the standards in their work, and requested feedback for how we could further refine the standards (before or after they are more widely released). The Ministry of Education is also already applying the social investment framework and standards to its work, and has asked for our assistance to do so. The Ministry for Housing and Urban Development is also using the framework and standards to guide its approach to an outcomes-based contract (and which we are supporting them with).

9(2)(g)(i)

We consider this as evidence that the framework and standards are filling a critical gap in helping agencies to think about evidence-based investment decisions; that they are practical and not daunting for agencies to attempt to use; and that they can potentially be applied to contexts (such as transport) that are outside of the traditionally defined social sector.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Strategic Insights for Government Targets

As discussed with you, we are supporting the DPMC Delivery Unit's quarterly reporting on Government Targets. We will initially leverage data currently in the IDI and available for other work we have done. Accessing up-to-date data, either directly from agencies or within the IDI is critical to the value of this work in supporting Ministerial decision-making and prioritisation. This will require working closely with both the Delivery Unit, Stats NZ and agencies to make data availability a priority.

We expect this work will demonstrate how social investment can strengthen delivery against the targets through:

- Providing a deeper understanding of the different target populations impacted by each target and the extent to which they overlap (and where opportunities for early intervention are)
- Identifying and quantifying cross-cutting populations of relevance for multiple targets
- Analysing geographic disparities in performance against the targets
- Exploring 'what it will take' to meet the targets in relation to all of the above.

We believe that our Social Investment standards and guidance may also have a role in the further development of target Delivery Plans. We are working with the Delivery Unit and other central agency partners to incorporate this thinking into planning processes.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment: evaluating social sector spending

Impact of social sector spend

Following your approval of our proposed approach to the review of impact of spend, we continue at pace to refine our analysis. We have provided your office with draft letters to send to your colleagues, which will strengthen buy-in and mandate for these reviews.

As this is a new process (for ourselves and agencies), issues we are encountering and are working through with agencies include:

- Getting clear on who is 'leading' the reviews (or whether they are being done jointly) – our current approach positions us as leading on advice relating to the evidence of impact, but ensuring the partner agencies are clear that they can continue to advise on how to integrate this advice within the two strategies they have responsibility for; and
- How to best balance what is implied by the evidence of effectiveness with operational considerations such as existing contractual arrangements and capacity within regions to further scale up programmes.

We are also discussing with Treasury how these reviews will align to Budget timeframes.

9(2)(g)(i)

We are considering how to manage these complexities, which will could involve some external assurance (eg, expert academic advice) over our process and assessments.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Insights on attendance

We recently completed our final piece of work supporting the Education Review Office (ERO) with their review of the attendance service. Our analysis investigated which social factors outside of the education system are most influential to student's attendance. Attached to this report is a slide deck providing an overview of our findings.

We found the key factors associated with **increased** attendance were:

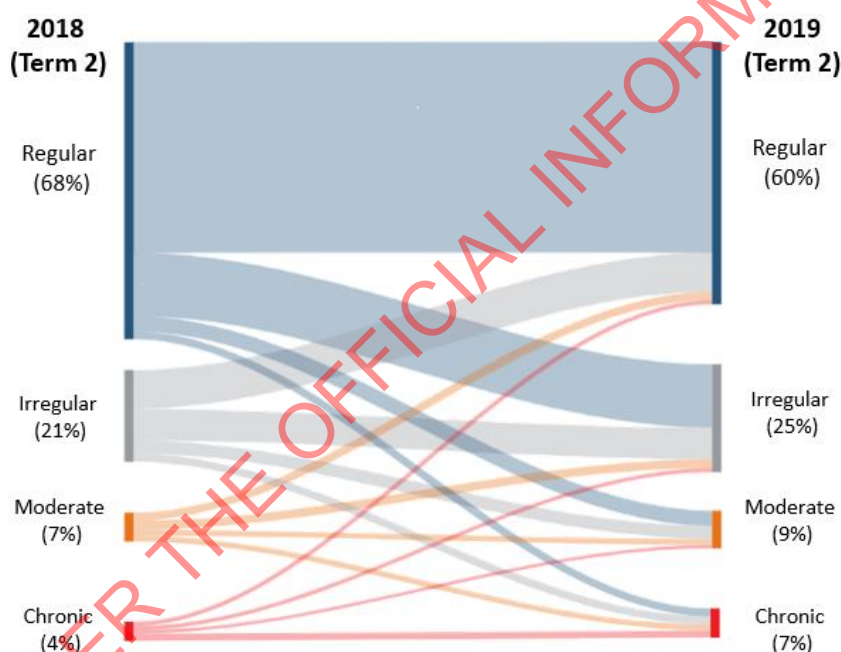
- Previously participating in early childhood education
- Having a mother with higher education attainment.

We also identified a number of factors that **decreased** the odds of regular attendance. A number of these align closely with Government Targets. Students are less likely to attend regularly if they:

- Have a record of offending (**Government Target**)

- Have been a victim of crime **(Government Target)**
- Live in social housing, or emergency housing **(Government Target)**
- Live with a family member who receives any type of benefits **(Government Target)**
- Had visited the emergency department in the last year **(Government Target)**
- Access mental health and addiction services, or have parents who had access these services
- Have been diagnosed with autistic spectrum disorder
- Had an OT investigation
- Live in high deprivation areas.

We also found that while attendance is ‘sticky’, and past non-attendance predicts future non-attendance, there are also many students who vary in their attendance patterns over time. For example, of the students with irregular attendance (attending 80-90% of the time) in 2018, only a third continued to have irregular attendance in 2019. The remainder were roughly evenly split between those who increased their attendance to regular, and those whose attendance dropped off. Students whose attendance dropped off were more likely to experience the above factors.



This work helps to highlight relationships that exist between the Government Targets, which we intend to discuss with DPMC, and feed into our strategic insights relating to the targets.

While we do not currently have any additional work planned with ERO specifically on attendance or the attendance service, we are currently discussing with them how we can support their work in NCEA achievement.

Contacts	Andrew Webber, 9(2)(a) Chief Economist
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Other

Financial Performance Plan

The Agency has begun scoping its Performance Plan, as required by The Treasury. The plan details how the agency will achieve results within its baseline funding and highlights risks and opportunities to improve fiscal sustainability. We will prepare a briefing for you in late August on this plan.

Contacts

Catherine Williams, 9(2)(a)
Director, Office of the Chief Executive

Publishing underlying data for previous work

In June 2023 we published information on outcomes for young people in Alternative Education. We have received a request for the underlying data relating to that work to inform the requester's applications for (initially) philanthropic funding of various initiatives to assist students to stay in school. The requester has also asked whether we conducted any analysis on the fiscal cost to government associated with Alternative Education, which we did but never published.

In addition to responding directly to the requester, we propose to add tabular data (ie, an excel spreadsheet) to the relevant publication page on our website, alongside what has already been publicly released in graphical form. We also propose to publish the fiscal calculations given there is likely to be broader interest in this information. This adds to the findings of the previously published report by showing the extent to which later life outcomes for those who participate in Alternative Education are costly for government and society (and the individual).

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: data and evidence infrastructure 9(2)(f)(iv)	This joint briefing to you and Minister Bayly seeks your direction for a report-back to Cabinet in October	22 August 2024
Briefing: Advice on release of Budget papers	This paper advises on the Agency's papers that will be released as part of Treasury's Budget 2024 release.	22 August 2024
Briefing: Paper to Joint Ministers to release tagged contingency funding from Budget 24	This paper will seek your agreement and the agreement of the Associate Minister of Finance to release the Vote Social Investment tagged contingency funding from Budget 2024.	29 August 2024
Briefing: Performance Plan	The plan details how the agency will achieve results within its baseline funding and highlights risks and opportunities to improve fiscal sustainability.	29 August 2024
Memo: Annual Report	Draft of the Agency's 2023/24 Annual Report for your information (will be part of Public Service Commission's final report)	29 August 2024
9(2)(g)(i)		
9(2)(g)(i)		

OIA requests

Topic / Requester	Comment	Due date to requestor
Departmental OIAs		
A request from the Labour Leader's Office for all communication between tiers one, two and three regarding Baseline Savings Targets 2024.	A response is being prepared. Documents for consultation with Minister's office due 16 August 2024.	23 August 2024
A request from Radio New Zealand for information relating to Value Impact and Measurement Standards.	A response is being prepared.	27 August 2024
A request from the Labour Leader's Office for correspondence and contracts in regard to ImpactLab, New Zealand Initiative, New Zealand Taxpayers' Union and the Salvation Army.	A response is being prepared.	3 September 2024
A request from Taxpayers' Union regarding credit card use: a detailed breakdown of credit card expenses and copies of invoices and receipts for these credit card expenses.	A response is being prepared.	11 September 2024
Ministerial OIAs		
A request from the Labour Leader's Office for all communication in the office regarding Baseline Savings Targets 2024.	A response is being prepared, with assistance from Treasury.	19 August 2024
A request from Radio New Zealand for all reports and advice provided to the Minister for Social Investment since Jan 2024.	A response is being prepared. Documents for consultation with Minister's office due 19 September 2024.	1 October 2024

Cabinet Papers we have provided comment on

Topic	Comment
Plan to deliver Target 8 and end the large-scale use of emergency housing	We provided feedback to about the use and description of our recent IDI analysis and indicators for quarterly reporting. In particular, we see greater opportunity for data to inform actions and decisions that prevent emergency housing need and to monitor where people go after they exit emergency housing to ensure sustainable exits and better outcomes. We also recommended (and offered to help with) inclusion in the September report back to Housing Ministers and the Minister of Finance to ensure (and make explicit) tight alignment of proposals with the Social investment Checklist, and provide detail on the opportunity and plan to improve transitions from state care.



Social Investment Agency
Toi Hau Tāngata

Fortnightly Report Week Ending 30 August 2024

To: Hon Nicola Willis
Minister for Social Investment



Priorities

The Social Investment Agency works to support your priorities to:

- set standards, establish the data and evidence infrastructure and develop new ways of working to deliver social investment
- roll out a programme to evaluate areas of existing social sector spending to better understand the return New Zealanders are getting from current social sector spending
- make sufficient progress early in this term to allow Budget 2025 to have a significant focus on social investment, if agreed.

We are also focused over the next quarter on supporting you to implement the changes set out in your recent Cabinet paper, including:

- establishing the Social Investment Board
- supporting the Social Investment Ministerial Group
- initial policy work to establish the Social Investment Fund
- 9(2)(f)(iv) [REDACTED]
- jointly reporting back to Cabinet with Stats NZ by 1 October 2024 on data and evidence infrastructure needs for social investment.

Governance and coordination of social investment

9(2)(f)(iv)

Upcoming Social Investment Ministers meeting

You have scheduled the next meeting of the Social Investment Ministers Group to be 10 September 2024 and identified two items for the agenda:

- The impact reviews of family violence and sexual violence spend – overview (presentation by the Agency)
- The role of commissioning, procurement and contract management for implementing social investment (round table discussion).

We have prepared a draft presentation on the impact reviews, which we have provided to your Office for your review and feedback.

We have also drafted a short briefing for you to present to your colleagues to initiate discussion on commissioning, which has also been provided to your Office for your review and feedback.

We will continue to work with your Office to finalise the agenda and these supporting documents to provide to the Ministers' Group as soon as possible.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy Data and Insights

Social Investment Fund – specialist resourcing in place

The Social Investment Fund implementation team is in place with detailed planning underway. We plan to brief you with a detailed work programme and key upcoming decisions over the next few weeks.

Contacts

Alistair Mason, 9(2)(a)
Deputy Chief Executive, Social Investment and Delivery

Social Investment Board appointment process

We understand you are engaging with your colleagues to refine a short list of potential Board members. This is based on the briefing we provided you with all Board applicants.

We remain ready to support the timely Board appointment process. The next step in this process after we have your feedback is to conduct appropriate checks, including referee checks. We now estimate the first Board meeting will be in early October 2024, following Cabinet approval of members.

Contacts	Craig Sengelow, 9(2)(a) Principal Advisor, Governance
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Social sector commissioning information request

Your Office recently reached out to Minister Upston's Office with a request for information relating to social sector commissioning. This request was focused on:

- Some basic stats about how many contracts are held with how many providers (and therefore how many contracts with agencies each provider holds).
- Information about where the social sector commissioning/relational commissioning work is at – recent activities and progress, what is planned next, and where it's all going.

We understand that the first part of this information request has been addressed, with the second half planned to be addressed shortly (to coincide with advice MSD are currently preparing for Minister Upston).

MSD have provided information about a stocktake of Social Sector Commissioning activity in 2020/21 undertaken by the Social Sector Commissioning Hub. This showed that:

- Commissioning of social services by government funders is split across 21 government agencies and Crown entities. It is common for each to focus on responding to the priorities of their Ministers, addressing their own portfolio issues, and implementing new initiatives.
- The sector includes an estimated \$6–7 billion in social supports and services through NGOs in more than 18,800 separate arrangements (including contracts, grants, and other funded agreements). There were over 5,800 providers involved in delivering services.
- The number of providers per government funding agency were as follows, noting there will be double counting where providers have arrangements with multiple government agencies:

5,613 MOH	1,845 MSD	1,835 DIA	957 MOE	778 ACC
584 OT	165 HUD	139 MOJ	87 TPK	78 MPP
55 Ara Poutama	41 Police	7 MBIE		

Contacts	Rebecca Hollingsworth, 9(2)(a) Manager, Policy and Insights
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Social Investment: standard setting, data and evidence infrastructure and new ways of working

Planning release of Value and Impact Measurement Standards and Social Investment 'Checklist'

We are receiving a lot of interest in the value and impact measurement standards, including an Official Information Act request for their release. 9(2)(f)(iv)

and we have therefore declined the OIA request on the basis that the standards are under active consideration. We are working with your Office on opportunities for you to publicly release the standards 9(2)(f)(iv)

We are working on getting the standards publication ready. We currently have both the short version of the standards along with a longer guidance document with editors for a plain English review. Similarly, we have also sought a plain English review of the Social Investment Checklist and are currently developing a companion document for the Checklist that will help step readers through different components of social investment.

9(2)(f)(iv)

. Release of these documents will support agencies, providers and individuals to learn more about these expectations and make progress on a more consistent measurement approach.

Contacts

Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

IDI Data for Government Targets

Stats NZ has sent letters to agencies requesting information on the data that they hold that could be useful for social investment but is not yet available in the IDI. Responses are expected the first week of September. We are working with Stats NZ on prioritising data to be inputted and are keen that information relevant to achievement of the government targets is given primacy.

We are also interested to hear from agencies what IDI data they would find useful to inform their policy and spending decisions, particularly in relation to the achievement of government targets. We are having bilateral conversations about data analysis for targets with relevant departments, including Ministry of Health, Ministry of Education, Ministry of Social Development, Ministry of Justice and Ministry of Housing and Urban Development.

Contacts

Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment: evaluating social sector spending

Impact Reviews update

We continue to be on track to deliver initial advice to you in the first week of October 2024.

We are currently undertaking a close reading of the (more than 60) evaluations we have so far, in order to summarise what they are telling us about the impact of each programme.

We have completed a scan of the broader literature about what works in prevention/response for family violence and sexual violence (FVSV). We have successfully developed a method that involves subject matter experts using AI tools to synthesise large bodies of evidence, to extract maximum insight with least time investment. We are now applying this approach to a similar literature scan focused on what works in the first 2,000 days.

We have output our first tranche of data from the IDI across the two analytical projects focused on FVSV and the first 2,000 days. We are discussing these early findings with data experts across several agencies to ensure the insights are robust and actionable. We have attached some initial things we are seeing in this data.

We are working with our lead partners to develop a structured process to arrive at the investment advice we will give you in the report back in early October.

We have sent requests for additional information to agencies for the first 2,000 days review. This asks them to validate the information we have already collected, as well as filling in any missing gaps. We are also holding information sessions with agencies to discuss the review and support their participation. Te Puna Aonui has sent similar requests to agencies for the FVSV review, and are providing a system coordination and leadership role in the delivery of that review.

9(2)(f)(iv)

[Redacted text block]

We are providing a slide pack that could be used to support the discussion about the Impact Reviews at the Social Investment Ministers meeting on 10 September. We are anticipating that, with the exceptions of Ministers Upston and Chhour, Social Investment Ministers are unlikely to have much knowledge of these reviews, and so the slides will provide the context, purpose and timelines for this work.

Contacts	Andrew Webber, 9(2)(a) Chief Economist
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Other

Tagged contingency paper

We have undertaken high level financial planning to inform our expected funding requirements and are currently engaging with the Treasury on a plan to draw down tagged contingency funding approved in Budget 2024. We will then submit a request to you and the Associate Minister of Finance seeking your agreement to draw down funding.

Contacts	Catherine Williams, 9(2)(a) Director, Office of the Chief Executive
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Strategy Planning and Strategic Intentions

As a new agency we need to product a Strategic Intentions document which sets our role, our organisational objectives and the outcomes we are seeking, before 1 January 2025. We will provide further information on this in September and provide a draft for discussion with you in October 2024.

Contacts	Catherine Williams, 9(2)(a) Director, Office of the Chief Executive
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NCEA achievement

We have an ongoing cost-recovery relationship with Education Review Office (ERO) to support analytical work in the IDI. We will be supporting ERO to investigate the value of the NCEA Level 1 qualification. We will look at the life outcomes of 28 to 30 year-olds with varying levels of NCEA/NZQA attainment, to determine whether there is a benefit of attaining only NCEA Level 1 (but not higher levels of NCEA), relative to no school qualifications.

This work aligns with the strategic insights work we are undertaking with DPMC on Government Targets, in that the best available administrative proxy for the student achievement target (in Year 8) is performance in NCEA Level 1 (in Year 11). We expect to have initial insights towards the end of September and will share with you in due course.

Contacts	Aphra Green, 9(2)(a) Deputy Chief Executive, Policy, Data and Insights
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Upcoming Papers

Briefings and reports

Title	Description	Due date
9(2)(f)(iv)		
Memo: Draft Social Wellbeing Agency Annual Report 2023/24	Draft of the Agency's 2023/24 Annual Report for your information (will be part of Public Service Commission's final report)	29 August 2024
Briefing: Initial Ministerial Priorities for the Social Investment Board	This paper seeks your feedback on initial focus areas for the Social Investment Board	29 August 2024
Briefing: Paper to Joint Ministers to release tagged contingency funding from Budget 24	This paper will seek your agreement and the agreement of the Associate Minister of Finance to release the Vote Social Investment tagged contingency funding from Budget 2024.	5 September 2024
Briefing: Performance Plan	The plan details how the agency will achieve results within its baseline funding and highlights risks and opportunities to improve fiscal sustainability.	5 September 2024
9(2)(f)(iv)		
9(2)(g)(i)		
Briefing: Strategic Intentions	This paper will seek your agreement on Strategic Intentions for the Social Investment Agency for financial years 2025-2029	9 October 2024

OIA requests

Topic / Requester	Comment	Due date to requestor
Departmental OIAs		
A request from the Labour Leader's Office for correspondence and contracts regarding ImpactLab, New Zealand Initiative, New Zealand Taxpayers' Union and the Salvation Army.	A response is being prepared.	3 September 2024
A request from Taxpayers' Union regarding credit card use: a detailed breakdown of credit card expenses and copies of invoices and receipts for these credit card expenses.	A response is being prepared.	11 September 2024
A request from Stuff requesting information regarding the 2024 change processes	A response is being prepared.	13 September 2024

Ministerial OIAs		
A request from Radio New Zealand for all reports and advice provided to the Minister for Social Investment since Jan 2024.	A response is being prepared. Documents for consultation with Minister's office due 19 September 2024.	1 October 2024

Cabinet Papers we have been consulted on

Topic	Comment
No papers this week.	Nil.

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Analytical approach for impact reviews

We are reviewing investment across two priority areas

We are examining the impact of investments supporting children in their first 2000 days; and recent investment in prevention or response to family or sexual violence. The purpose of this work is to identify opportunities for future investment decisions that align to the evidence about what works and for whom. These impact reviews are structured using the Social Investment Checklist recently developed by SIA (excerpt below).

OUTCOMES
☐ There is a discrete set of outcomes you are trying to achieve, and these are defined in terms of what people's lives would look like if the intervention is successful. ☐ The desired outcomes are measurable (indicators of the outcomes are defined). ☐ There is an ability to measure both immediate shifts and ultimate outcomes (and links between immediate and ultimate outcomes are logical and clear). ☐ IDEALLY: The outcomes are available across the whole population
WHO
☐ Evidence is available on specific (closely defined) groups that are not achieving or not likely to achieve the desired outcomes. ☐ There are operational opportunities to identify and better support these groups. ☐ Evidence on the experiences of these groups and on the factors contributing to the outcomes is articulated. ☐ IDEALLY: Partners have been identified that are close to the populations of interest and who can aid in designing and/or delivering services to them.

This work will be supported by SIA-led data analysis

We will use the Integrated Data Infrastructure (IDI) to provide advanced analytics enabling us to cover the 'outcomes' and 'who' sections of the Checklist. We have begun two analytical projects, each oriented around one of the priority areas. This will later be combined with insights arising from our assessments of impact, based on evaluation and monitoring of individual programmes, as well as our scan of the broader research literature on what works.

Our analyses aim to answer three core questions

1. **Who** are the people the government should prioritise effective support for?
This involves identifying a small target group of individuals/whānau for whom we have clear evidence of exceptional need for more effective support relating to the priority area.
2. **How** might we find these people?
This involves identifying a group that is easily operationally identifiable (for example, the clients of a single agency, or a geographically-bounded community) that has the largest overlap with the priority group we have identified.
3. **What** are the benefits of better supporting these people?
This involves describing what we know about the future needs and outcomes for the group we've identified, to provide evidence on the flow-on benefits of more effective support.



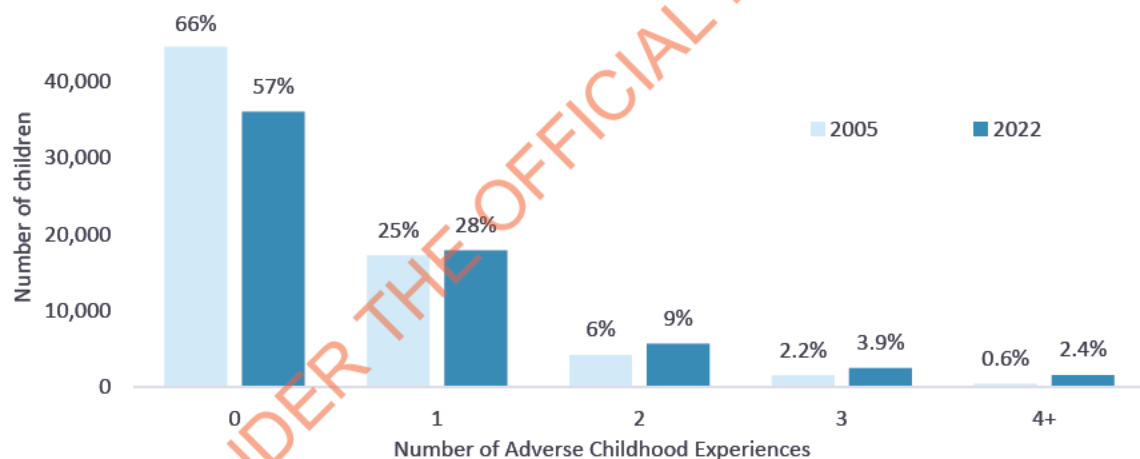
Emerging insights – First 2000 Days

Analysis for this priority area uses Adverse Childhood Experiences (ACEs) as a guiding framework, counting the number of ACEs experienced by children in the first five years of life.

Family violence	Any evidence of FV (Te Puna Aonui indicator)	10% of children
Sexual violence	Any evidence of SV (Te Puna Aonui indicator)	0.3% of children
Parents with substance abuse	Live with parents/caregivers who have specialist referral for alcohol/drug use	8% of children
Parents with mental illness	Live with parents/caregivers who have referral or diagnosis of serious mental illness	18% of children
Incarcerated parents	Parents/caregivers have custodial sentence spell	5% of children
Parental separation	Via various sources (Census, DIA, MSD)	28% of children

Need, as measured by ACEs, is increasing over time

We have identified two cohorts of children – those aged 5 in 2005, and those aged 5 in 2022. Relative to two decades ago, we can now identify many more children at the highest end of need, with four times as many five-year-olds having evidence of 4+ ACEs in 2022 than in 2005.



The ACEs that have experienced the biggest increases in prevalence over this time are children who have parents with evidence of serious mental health needs (7% to 18%), and children with evidence of exposure to family violence (3% to 10%). Some of this may be increases in coverage in administrative data, although the increase in mental health needs is mirrored in survey data.

We will demonstrate links between ACEs and adult outcomes

We plan on tracking the 2005 cohort forward to articulate the relationship between the number of ACEs experienced before the age of 5 and later life outcomes (across health, education, income, employment, and crime). We will then identify overlaps with the clients of various agencies, especially in the health, justice, and care systems.

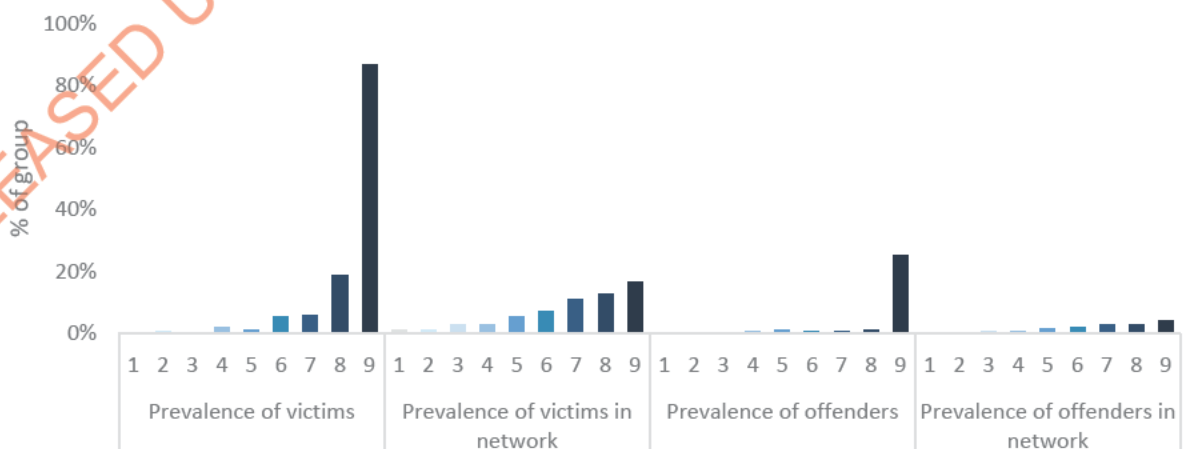
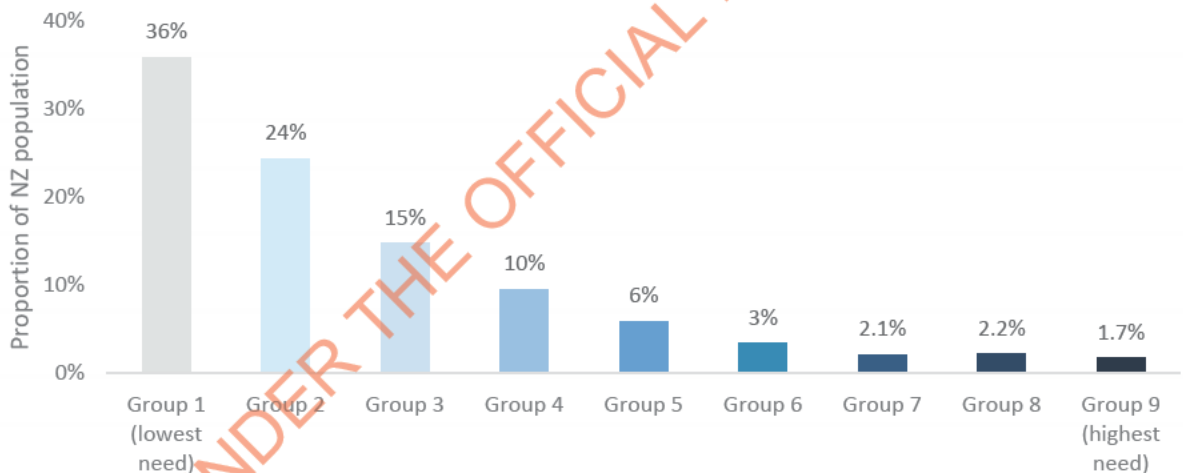


Emerging insights – FVSV

We have combined four basic types of information to assemble a large dataset that describes the lives of people in ways that are relevant to their exposure to family/sexual violence.

Signals of FVSV	Other signals of need	Actors	Relationships
Drawn from: -Police -Courts -Corrections -Oranga Tamariki -Hospitalisations -ACC	-Offending and victimisation -Mental health/AOD -Employment -Education -Community	-Those using violence -Victims of violence -Those observing violence	-People living in the same household -Extended family who live nearby

We have analysed this rich dataset using **cluster analysis**, a statistical method that identifies subgroups of people who are alike on many different attributes. This method results in segmenting the entire NZ population into nine groups of increasingly higher need. These groups increasingly concentrate the people we have evidence are victims and those who use violence, but also people who are in whānau networks with others who use or experience violence.



IDI disclaimer

These results are not official statistics. They have been created for research purposes from the Integrated Data Infrastructure (IDI) which is carefully managed by Stats NZ. For more information about the IDI please visit <https://www.stats.govt.nz/integrated-data/>.

Access to the data used in this study was provided by Stats NZ under conditions designed to give effect to the security and confidentiality provisions of the Data and Statistics Act 2022. The results presented in this study are the work of the author, not Stats NZ or individual data suppliers.

The results are based in part on tax data supplied by Inland Revenue to Stats NZ under the Tax Administration Act 1994 for statistical purposes. Any discussion of data limitations or weaknesses is in the context of using the IDI for statistical purposes, and is not related to the data's ability to support Inland Revenue's core operational requirements.





Fortnightly Report – week ending 13 September 2024

Date: 13 September 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-073

Purpose

This fortnightly report provides you delivery updates for the Social Investment portfolio for the fortnight ending 13 September 2024.

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Impact reviews

You have indicated that you expect the impact reviews to:

- focus on two areas of spend initially (First 2000 days and Family Violence and Sexual Violence)
- 9(2)(f)(iv)

These reviews will also include valuable insights and recommendations to improve the impact of social sector spend, supporting your focus on an ongoing programme of review.

9(2)(f)(iv)

Research spotlight – impact of Best Start Payment on child abuse and neglect

Finding Evidence of significant reductions in child abuse and neglect for some cohorts of New Zealand children are attributable to the Families Package

Description Using the IDI, researchers at Auckland University have assessed the impact of the Families Package on measures of child abuse and neglect the first three years of life and found:

- an overall reduction of 19% in referrals to family group conferences in nonurgent cases of suspected maltreatment, but no significant differences in urgent cases. For Māori children and those for whom OT had **previously** recorded notifications of concern for older (half) siblings, the reduction was 26%.
- a 40% reduction in neglect among single-mother families.

This research provides evidence of improved social outcomes for New Zealand children attributable to the Families Packages (particularly the Best Start payment), beyond the immediate impact of increased parental income. The impact was greatest for Māori children, those living in high deprivation neighbourhoods, children in single-mother families and those who had siblings for whom OT had previously recorded notifications of concern. Experiencing abuse and neglect in early life has long term negative impacts on cognitive, psychological and health outcomes. As such, prevention of child maltreatment is likely to improve long term outcomes.

The findings of this research are consistent with emerging international evidence that rates of child abuse and neglect may be amendable to public unconditional cash transfers to families. Together, this evidence provides support for the efficacy of the Best Start

BUDGET SENSITIVE

payment in supporting New Zealand families with young children, and could guide its targeting towards higher need cohorts.

We have shared this research with Treasury.

Reference: Moullin, S., & Milne, B. (2024). The Effects of Small Unconditional Cash Transfers on Child Abuse and Neglect in Early Childhood: Evidence from New Zealand. (No. 6yx4m). Center for Open Science.

Contact Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change, including:

- establishing the Social Investment Board
- supporting the Social Investment Ministerial Group
- establishing the Social Investment Fund
- 9(2)(f)(iv)
- jointly reporting back to Cabinet with Stats NZ by 1 October 2024 on data and evidence infrastructure needs for social investment.

Social Investment Board

Status Appointment process on track – membership briefing with your office

Description We understand your office is considering membership of the Social Investment Board. This follows the briefing we provided you on Friday 6 September with comments on the shorter list of Board members. All people on this list were met last week and referee checks on all of them are well underway.

The next step in this process will be formal consultation and then a paper seeking Cabinet approval of your proposed appointments to the Board (via APH or CBC). We now estimate the first Board meeting will be mid-to-late October 2024.

Contact Craig Sengelow, 9(2)(a)
Principal Advisor, Governance

Integrated Data – draft Cabinet paper

Status SIA providing input into draft Cabinet paper

Description Stats NZ are leading on the draft Cabinet Paper focused on integrated data infrastructure and settings needed to enable social investment. We are currently providing input to a draft of this paper, which is expected to be with you and Minister Bayly in the next two weeks.

Stats NZ are targeting a Social Outcomes Committee report back in the mid-to-late October 2024.

BUDGET SENSITIVE

Contact	Rebecca Hollingsworth, 9(2)(a) Manager, Policy and Insights
Integrated Data – improving IDI data for social investment	
Status	Prioritising data for the IDI
Description	Stats NZ has recently completed a process to collect information from agencies on data that it holds that could be added to the Integrated Data Infrastructure (IDI) to support social investment. We are working with them to prioritise this list, based on the following criteria: • Data which could support the achievement of Government Targets • Data which could enable identification of different groups served by specific social sector programmes (i.e. who is getting what and how much of it) • Data which could enhance understanding of the outcomes of social investments We anticipate this exercise will cover improvements to the quality and timeliness of existing datasets as well as identification of new datasets. Stats NZ will lead the conversations with agencies on progressing these improvements. We are further supporting Stats NZ to identify and partner with NGOs who might want to put data into the IDI directly in order to better understand the impact of their work.
Contact	Tahia Eaqub, 9(2)(a) Manager, Analytics and Data Systems

Other updates

Social Services Providers' Association Conference	
Status	Acting Chief Executive on panel at Social Services Providers' Association conference
Description	Whakamanawa – the Social Service Providers Association conference is taking place on 16-17 September in Christchurch. SIA's Acting Chief Executive will be taking part in a panel discussion on social investment, alongside Sir Bill English and Nicola Nation on day 1. While in Christchurch, we will take the opportunity to meet with Ngāi Tahu to discuss social investment and opportunities for collaboration (part of an ongoing conversation we are having with them).
Contact	Catherine Williams, 9(2)(a) Director, Office of the Chief Executive
Tagged contingency	
Status	Preparing request to draw down Budget 24 tagged contingency
Description	We are currently preparing for you and the Associate Minister of Finance, a briefing requesting draw down of tagged contingency funding approved in Budget 2024. In the meantime, we will submit the cost pressure template as part of the Performance Plan process on the basis that tagged contingency funding will be provided to fund the costs of

BUDGET SENSITIVE

Social Investment Agency's new functions. Ahead of submitting the tagged contingency paper we are engaging with Treasury.

Contact

Catherine Williams, 9(2)(a) [REDACTED]
Director, Office of the Chief Executive

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Upcoming Papers

Briefings and reports

Title	Description	Due date
Aide Memoire: Wise Group visit 13 September	Advice on visit to visit the Wise Group in Hamilton, 13 September 2024	12 September 2024
9(2)(g)(i)		
Briefing: Regional Data Tool release on 19 September	Draft press release and communications material for the public release of the Regional Data Tool on 19 September	12 September 2024
9(2)(f)(iv)		
9(2)(g)(i)		
9(2)(f)(iv)		
9(2)(f)(iv)		
Briefing: Request to Draw Down Tagged Contingency Funding	This paper will seek your agreement and the agreement of the Associate Minister of Finance to release the Vote Social Investment tagged contingency funding from Budget 2024.	23 September 2024
9(2)(f)(iv)		
9(2)(g)(i)		
Briefing: Strategic Intentions	This paper will seek your agreement on Strategic Intentions for the Social Investment Agency for financial years 2025-2029	9 October 2024

OIA and Ministerial Correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Azaria Howell - journalist from Newstalk ZB Wellington and the New Zealand Herald.	Request the total cost to set up the Social Investment Agency and transfer from the Social Wellbeing Agency to the Social Investment Agency.	29 September 2024
9(2)(a) member of the public.	Request for fortnightly reports from July 2023-2024. Briefings and memos from March – July 2024.	4 October 2024
9(2)(a) Researcher, Taxpayers' Union	Correspondence, documentation and costs regarding Wall Walks in the past three years.	8 October 2024
Ministerial OIAs		
Anusha Bradley - journalist from Radio New Zealand	All substantive policy advice about social investment, including the regular fortnightly report since January 2024.	1 October 2024
Ministerial Correspondence		
Shaun Robinson, CE of Mental Health Foundation.	Requesting to meet with the Minister to discuss approach to social investment. Concerned that standard approaches for calculating SROI are limited to measuring individual service interventions	12 September 2024

Cabinet Papers we have been consulted on

Topic	Comment
Refreshing the Child and Youth Strategy and associated measures – draft Cabinet paper	This draft paper is from the Minister for Child Poverty Reduction on refreshing the Child and Youth Strategy and associated measures, and the draft Child and Youth Strategy itself. We indicated our general support for the paper and suggested some minor changes to clarify some of the discussion about targets and to more clearly draw out some references to social investment.

Upcoming engagement and communications opportunities

Opportunity	Description	Date
Engagement: Wise Group visit 13 September	Visit to visit the Wise Group's integrated service delivery centre in Hamilton, 13 September 2024	13 September 2024
Announcement: Regional Data Tool release	The Regional Data Tool will be made available to the public on the SIA website on 19 September. You have the opportunity to highlight the tool with a press release	9(2)(g)(i)
9(2)(g)(i)		
Speech: IPANZ Public Sector Conference	We are working with your office to provide you with a speech aimed at the public service outlining your expectations and the social investment approach.	24 October 2024
9(2)(g)(i)		
Event: Social Investment Hui	We are currently working up options for a social investment hui bringing together the Board, peak providers, iwi/Māori, and other interested parties	November TBC
Announcement: Board appointments	Advice to come	October/November TBC
9(2)(f)(iv)		



Weekly Report – Week ending 27 September 2024

Date: 27 September 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-083

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 27 September 2024.

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Upcoming Cabinet papers	
Status	Sequencing lodgement of Cabinet papers
Description	We are working to deliver you three draft Cabinet papers before the end of the year: • 9(2)(f)(iv) [REDACTED] • Integrated Data and Social Investment (with Stats NZ) • 9(2)(f)(iv) [REDACTED] 9(2)(f)(iv) [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] ■ [REDACTED] ■ [REDACTED] We will work with Stats NZ over the next couple of weeks to ensure you and Minister Bayly have a draft Integrated Data paper to review and support agency consultation. 9(2)(f)(iv) [REDACTED] [REDACTED]
Contact	Rebecca Hollingsworth, 029 918 9346 Manager, Policy and Insights

Status	Papers underway, proposed agenda below for agreement
Description	The next Social Investment Ministers' meeting is scheduled for 14 October. As discussed with you, we are preparing for an agenda covering: • Social Investment Outcomes Contracting – parameters and proposed approach • Examples of Social Investment contracting underway – MHUD, Whānau Ora, SIA and MSD prototyping • Impact reviews – overview of findings • Report-back from StatsNZ on data gaps in IDI
Contact	Rebecca Hollingsworth, 9(2)(a) Manager, Policy and Insights

Changing the system

Status	Providing ongoing input to PIF Guidance, Performance Plans, Budget processes
Description	We are working with Central Agencies to bring social investment thinking to the public service. DPMC has included the value and impact measurement standards and Social Investment Checklist in guidance on Government Target Delivery Plans. The SIA has provided input in the process of updating the PSC Agency Performance Improvement Model. We have had conversations with Treasury around how SIA guidance can sit alongside Performance Plan and Budget templates. The Impact Reviews have already had the effect of encouraging behavioural change in agencies in terms of the information they are collecting about the services they commission and the investment decisions they are making. In addition, we have heard anecdotally from agencies about how they are using the standards and guidance in framing their work.
Contact	Aphra Green, 9(2)(a) Deputy Chief Executive, Policy, Data and Insights

Other updates

Social Services Providers' Association Conference

Status	Acting Chief Executive on panel at Social Services Providers' Association conference
Description	Acting Chief Executive Craig Jones participated in a social investment panel at the Social Service Providers' Association Conference. The other members of the panel were Nicola Nation (Chief Executive of Ākina Foundation) and Sir Bill English. Providers were interested in the design and implementation of social investment, the difference between the newly established SIA and the previous iteration, and emphasised their wish to be consulted and involved in design. Questions raised during the formal and informal conference sessions were positive.
Contact	Aphra Green, 9(2)(a) Deputy Chief Executive, Policy, Data and Insights

MHUD Paper: one-off funding transfer for emergency housing social outcomes contracting trial

Status	SIA comfortable with proposal, MHUD preparing Aide Memoire
Description	Along with Treasury, we met with officials from MHUD to discuss your questions on their paper seeking approval for a one-off funding transfer for emergency housing social outcomes contracting trial (HUD 2024-005349). We have been involved in prior conversations with MHUD on various aspects of the trial, including how outcomes might be measured in the IDI with reference to an appropriate comparison population. On the basis of the information gained through all of these discussions, we have assessed the MHUD proposal using the framework for social investment outcomes contracting that we are developing (with you for feedback) and consider that it meets all of the criteria to be considered a social investment outcomes contract. We continue to work with MHUD and Treasury to provide advice on the detailed design.

Contact	Aphra Green, 9(2)(a) Deputy Chief Executive, Policy, Data and Insights
Education Review Office – Evaluation of the Attendance Service	
Status	Draft report being finalised
Description	The Education Review Office (ERO) is in the final stages of completing their evaluation of the Attendance Service. The report looks at how well the education system identifies the students who are chronically absent or not enrolled, and works with them and their families to get them attending school regularly. We have contributed several analytical pieces over the course of the project to support ERO's fieldwork and survey of Attendance Services and Schools. Specifically, we have: - undertaken rapid evaluation of the attendance service in the IDI (similar to our review of Alternate Education providers) answering the following questions: - What are the characteristics of students who receive support from the Attendance Service? - What are the longer-term outcomes of students who are referred to the Attendance Service? - What is the effectiveness of the Attendance Service, in terms of longer-term outcomes? - Do estimates of effectiveness differ depending on type of student, or the type of provider? - investigated what factors contribute most to chronic and regular attendance This report will be circulated to Ministers as it is being finalised. Over the course of the review, we have kept you updated on our findings and will look to brief you on the final report, once finalised. Our analysis can also form the basis for understanding the potential impact of improvements in attendance service effectiveness, and could be used by the Ministry of Education to model any proposed changes to the service.
Contact	Andrew Webber, 9(2)(a) Chief Economist

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: Request to Draw Down Tagged Contingency Funding 9(2)(f)(iv)	This paper will seek your agreement and the agreement of the Associate Minister of Finance to release the Vote Social Investment tagged contingency funding from Budget 2024.	27 September 2024
Briefing: components of a social investment contract 9(2)(f)(iv)	This paper covers components of a social investment contract	27 September 2024

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Briefing: Findings from Impact Reviews	This paper advises you on the outcomes of the reviews of two areas of spend.	3 October 2024
Joint Briefing: Social Investment Outcomes Contracting (MSD)	This is a joint briefing with MSD on contracting and outcomes.	3 October 2024
Briefing: How the Social Investment Board may support you and initial Ministerial priorities	This briefing suggests priority areas for discussion for the Social Investment Board.	3 October 2024
Briefing: Social Investment Fund Implementation and Delivery	9(2)(f)(iv)	4 October 2024
9(2)(f)(iv)		
Briefing: Social Investment Fund approach to engagement	This briefing sets out a proposed approach to the first phase of engagement to inform design decisions and seeks your direction on the desired outcome of this phase.	4 October 2024
9(2)(g)(i)		
Papers for Social Investment Ministers' meeting	Agenda and papers for Social Investment Ministers' meeting	9 October 2024
9(2)(g)(i)		
Briefing: Strategic Intentions	This paper will seek your agreement on Strategic Intentions for the Social Investment Agency for financial years 2025-2029	16 October 2024
9(2)(f)(iv)		

OIA and Ministerial Correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
9(2)(a) member of the public.	Request for Fortnightly Reports for July 2024 and briefings and memos from March – July 2024.	4 October 2024
9(2)(a) - Researcher, Taxpayers' Union	Correspondence, documentation and costs regarding Wall Walk workshops in the past three years.	8 October 2024
9(2)(a) Office of Francisco Hernandez MP	Briefings on baseline savings exercise	15 October 2024
9(2)(a) Queenstown Advocate	Custom lists and advertising on social media	18 October 2024
Ministerial OIAs		
Anusha Bradley - journalist from Radio New Zealand	All substantive policy advice about social investment, including the regular fortnightly report since January 2024.	1 October 2024
Ministerial Correspondence		
Shaun Robinson, CE of Mental Health Foundation.	Requesting to meet with the Minister to discuss approach to social investment. Concerned that standard approaches for calculating SROI are limited to measuring individual service interventions	12 September 2024 (with office)

Cabinet Papers we have been consulted on

Topic	Comment
Learning Support Priorities Action Plan (MoE)	This draft paper outlines Minister Stanford's priorities for strengthening learning support in the education system. This includes making operational changes to make learning support easier to apply for, and basing funding models on data. We emphasised the opportunity to design data collection in a way that could be used to create a portfolio view of all learning supports; the ability to evaluate the effectiveness of these supports if the data is loaded in the IDI (showing our work on Teen Parent Units, the Attendance Service and Alternative Education as examples of what can be accomplished with the right data); and the opportunity to better share data on needs and supports between the education, health and care/protection systems (pointing to our previous IDI work on the Highest Needs Review). We have offered to support MoE with this design thinking.

Upcoming engagement and communications opportunities

Opportunity	Description	Date
Announcement: Board appointments	We will provide a draft communications material for your office's consideration.	21 October 2024
Speech: IPANZ Public Sector Conference	We are working with your office to provide you with a speech aimed at the public service outlining your expectations and the social investment approach.	24 October 2024
9(2)(f)(iv)		
Event: Social Investment Forum	We are currently working up options for a social investment forum bringing together the Board, peak providers, iwi/Māori, and other interested parties.	15 November 2024 (TBC)
9(2)(f)(iv)		



Weekly Report – Week ending 4 October September 2024

Date: 4 October 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-98

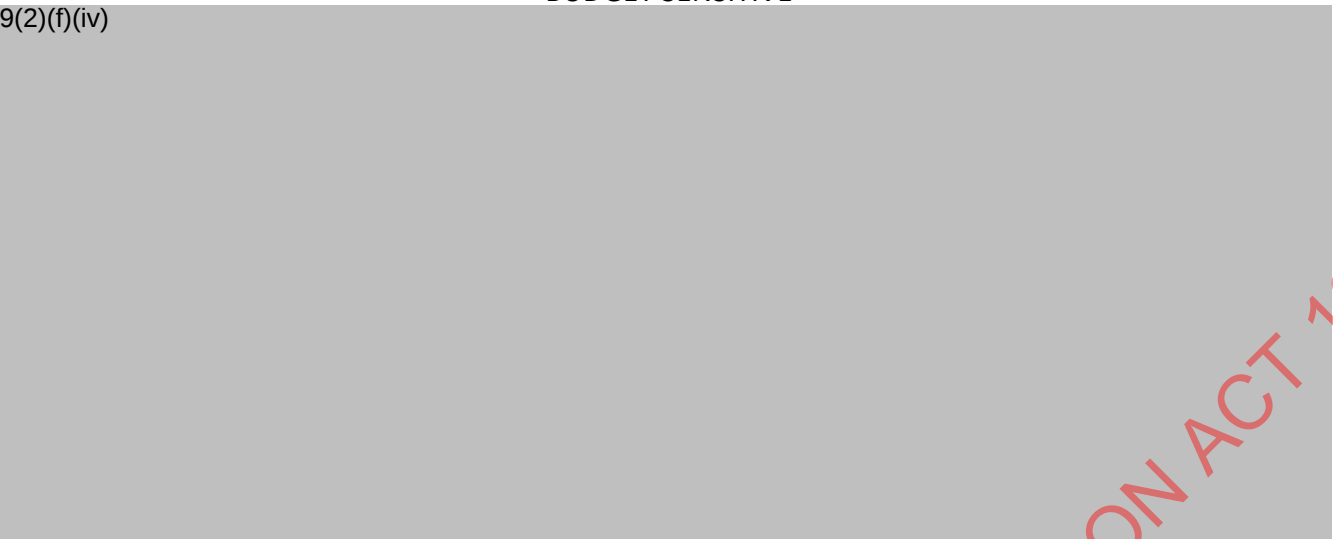
Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 4 October 2024.

9(2)(f)(iv)

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9(2)(f)(iv)



Social Investment Fund

Status	Briefings underway and next steps
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9(2)(f)(iv)



Impact reviews

Impact Reviews	
Status	Delivering findings and recommendations from the Impact Reviews
Description	You are receiving a set of briefings that will provide you with the high-level findings of the impact reviews and the key insights and recommendations for system change, 9(2)(f)(iv) for each of the Family Violence and Sexual Violence review and First 2000 days review. Child and Youth Ministers agreed that at the next meeting there should be a discussion about the first 2,000 days strategy priority area. Findings from the impact review will be integral to this discussion. 9(2)(f)(iv)
Contact	Andrew Webber, 9(2)(a) Chief Economist

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

Upcoming Cabinet papers	
Status	Updating Integrated Data and Social Investment draft Cabinet paper
Description	We are working with Stats NZ to refine the draft Cabinet paper on Realising Social Investment through better use of integrated data. 9(2)(f)(iv) Stats NZ are working to get the next version of this draft Cabinet paper to yourself and Minister Bayly in the next two weeks.
Contact	Rebecca Hollingsworth, 9(2)(a) Manager, Policy and Insights

Social Investment Ministers' meeting (14 October)

Status	Papers provided for agreement
Description	We have provided you, for approval: • Draft agenda • Draft supporting papers including: ○ Social investment contracts – rapid prototypes (paper from you to your colleagues inviting their participation in social investment contracting) ○ Impact Review slide deck (for presentation by Agency officials)

BUDGET SENSITIVE

- Draft annotated agenda

It is anticipated that a paper from Stats NZ will also be attached with the agenda when sent from your office. Stats NZ have advised that this paper will come to your office directly from Minister Bayly's office.

Contact Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

Other updates

ADHD evaluation options

Status SIA providing input into Ministry of Health-led advice on evaluation options

Description We have been supporting the Ministry of Health to brief you on options for how evaluating the outcomes from implemented changes to prescribing and diagnosing practices for ADHD and cost benefit assessment could be done. Our contribution has focused on ensuring options capture the role for integrated data to understand outcomes for people supported through proposed ADHD changes.

The briefing provides a high-level view on the options that could be carried out to fully understand the impacts of the proposed changes. Health officials are seeking to discuss the contents of the briefing in person to understand the direction Ministers are interested in taking and likely discuss any associated limiting factors and trade-offs.

You should receive this advice next week.

Contact Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

Evaluation of services for students who are chronically absent from school

Status ERO are providing the first draft of the review to Minister Seymour this week

Description The Education Review office is finalising its evaluation looking at the effectiveness and value for money of interventions aimed at getting chronically absent students back to school and keeping them there. The review was supported by the Ministry of Education and the Social Investment Agency. We supported this work through providing rapid evaluation of the Attendance Service within the IDI, which included:

- describing the characteristics and prior experiences of those that are referred to the attendance service,
- the effectiveness of the attendance service, in terms of longer-term outcomes
- cost to the Government of students with chronic absence compared to other groups.

Similarly to the findings from our evaluation of Alternate Education, we found the current Attendance Service model is not effective at creating sustained improvements in attendance. Outcomes for chronically absent students referred to the Attendance Service are worse than for a matched comparison group. The draft report is going to Minister Seymour's office this week and we will request a copy be provided to you, as appropriate.

Contact Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

Upcoming Papers

Briefings and reports

Title	Description	Due date
9(2)(g)(i)		
Papers for Social Investment Ministers' meeting	Final agenda and papers for Social Investment Ministers' meeting.	9 October 2024
Briefing: How the Social Investment Board may support you and initial Ministerial priorities	This briefing suggests priority areas for discussion for the Social Investment Board.	10 October 2024
Briefing: Social Investment Fund - Approach to engagement	This briefing will propose our approach to engagement as part of the Fund's development.	11 October 2024
9(2)(g)(i)		
Briefing: Strategic Intentions	This paper will seek your agreement on Strategic Intentions for the Social Investment Agency for financial years 2025-2029	16 October 2024
9(2)(f)(iv)		

OIA and Ministerial Correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
9(2)(a) - Researcher, Taxpayers' Union	Correspondence, documentation and costs regarding Wall Walk workshops in the past three years.	8 October 2024
9(2)(a), Office of Francisco Hernandez MP	Briefings on baseline savings exercise	15 October 2024
9(2)(a) Queenstown Advocate	Custom lists and advertising on social media	18 October 2024

Ministerial OIAs		
Anusha Bradley - journalist from Radio New Zealand	All substantive policy advice about social investment, including the regular fortnightly report since January 2024.	In progress
Ministerial Correspondence		
Deloitte	Commissioning: pain points and opportunities	10 September 2024

Cabinet Papers we have been consulted on

Topic	Comment
LEG Cabinet paper - Oranga Tamariki (Responding to Serious Youth Offending) Amendment Bill	SIA did not comment on this paper as it was not seeking policy decisions. We have previously commented on an earlier Cabinet paper seeking policy decisions.

Upcoming engagement and communications

Opportunity	Description	Date
Announcement: Board appointments	We will provide a draft communications material for your office's consideration.	21 October 2024
Speech: IPANZ Public Sector Conference	We are working with your office to provide you with a speech aimed at the public service outlining your expectations and the social investment approach.	24 October 2024
Release: Social Investment Factsheets	Public facing collateral under development, we are aiming to have ready for the Social Investment Hui and ongoing engagements.	15 November 2024
Event: Social Investment Hui	Planning is underway for a social investment hui bringing together the Board, peak providers, iwi/Māori, and other interested parties. A list of proposed invitees will come to your office shortly.	15 November 2024

9(2)(f)(iv)



Weekly Report – Week ending 11 October 2024

Date: 11 October 2024
Security level: Budget Sensitive
To: Hon Nicola Willis, Minister for Social Investment
Tracking Number SIA24/25-106

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 11 October 2024.

9(2)(f)(iv)

Impact reviews

Impact Reviews

Status	Potential inclusion of Impact Reviews as a key plank of Family Violence and Sexual Violence Action Plan
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Description	Te Puna Aonui are in the process of developing the 2025-2030 action plan for Te Aorerekura – the Government’s Family Violence and Sexual Violence Strategy (FVSV). The current draft of this Action Plan identifies two priorities in the first two years: • Working together with a focus on strengthening local multi-agency responses • Investing and commissioning well, building from the FVSV impact review and need to contract differently for better outcomes Te Puna Aonui anticipate the impact reviews as being foundational to how they start to think about FVSV investment. The Action Plan proposes an ongoing, annual impact review and reprioritisation process (with some potential involvement by SIA). We understand that the draft Action Plan will go to Ministers next week (with an aim to finalise for release by the end of the year).
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Similarly, the impact review focused on the First 2000 days continues to be foundational to the refresh of the Child and Youth Wellbeing Strategy. We understand that Minister Upston has asked that the discussion at the next Child and Youth Ministers meeting, scheduled for 18 November, focus on maternal mental health in the first 2000 days, including findings from the impact reviews.

9(2)(f)(iv) and 9(2)(g)(i)

Contact Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

Upcoming Cabinet papers

Status Updating Integrated Data and Social Investment draft Cabinet paper

Description Cabinet invited you and Minister Bayly to report back with detailed recommendations for the data and evidence infrastructure required for social investment. We are working with Stats NZ to develop the Cabinet paper for this report-back.

We have provided feedback to Stats NZ to ensure the paper aligns with your ambition for social investment. 9(2)(f)(iv)

We anticipate that this paper will be shared with your office, through Minister Bayly's office for your input and feedback in the next week.

There may be the opportunity to have both the Work Programme Cabinet Paper and the IDI Paper be considered by SOU at the same time.

Contact Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

Social Investment Ministers' meeting 14 October 2024

Status Papers circulated to Ministers, annotated agenda to come

Description We have provided an agenda and paper on outcomes contracts for the meeting scheduled on 14 October. These have been circulated to relevant departments. We expect an

BUDGET SENSITIVE

additional meeting paper from the Minister of Statistics will be provided to your office this week.

We will also send an annotated agenda to your office by Friday 11 October. This is to support you to Chair the meeting.

Contact	Rebecca Hollingsworth, 9(2)(a) Manager, Policy and Insights
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Social Investment Board

Status	Further conversations regarding Board membership are being undertaken by your office
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Description	We understand your office is considering membership of the Social Investment Board. This follows the provision to your office of a draft APH paper and further information on Māori applicants for potential Board membership.
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The next step in this process will be finalising, and submission, of a paper seeking Cabinet approval of the Board members, including the Chair through APH or Cabinet Business Committee. We now estimate the first Board meeting will be early November 2024.

Contact	Craig Sengelow, 9(2)(a) Principal Advisor, Governance
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Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: Strategic Intentions	This paper will seek your input on Strategic Intentions for the Social Investment Agency for financial years 2025-2029	16 October 2024
9(2)(g)(i)		
Briefing: How the Social Investment Board may support you and initial Ministerial priorities	This briefing suggests priority areas for discussion for the Social Investment Board.	17 October 2024
9(2)(f)(iv)		
Briefing: Social Investment Fund - Approach to engagement	This briefing will propose our approach to engagement as part of the Fund's development.	17 October 2024
Briefing: Social Investment Fund Implementation and delivery	This briefing will discuss next steps in the implementation of the Fund.	24 October 2024

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
9(2)(a) [REDACTED], Office of Francisco Hernandez MP	Briefings on baseline savings exercise	15 October 2024
9(2)(a) [REDACTED], member of the public	Fortnightly reports relating to engagement and briefings from February- June 2024	5 November 2024
Ministerial Correspondence		
9(2)(a) [REDACTED], Government & Public Sector Lead Partner, Deloitte	Commissioning: pain points and opportunities	10 October 2024

Cabinet Papers we have been consulted on

Topic	Comment
N/A	No Cabinet papers consulted on - no further action

Upcoming engagement and communications

Opportunity	Description	Date
Iwi Chairs Working group: attendance	We are attending a workshop of the working group convened by Amohaere Houkamou, under the auspices of Iwi Chairs. The aim of the workshop is for the group to share their work to date and to seek feedback from us.	15 October 2024
Speech: IPANZ Public Sector Conference	We are working with your office to provide you with a speech aimed at the public service outlining your expectations and the social investment approach.	24 October 2024
Announcement: Board appointments	We will provide a draft communications material for your office's consideration.	30 October 2024
Agency Speech: ANZEA Conference	Aphra Green is a keynote speaker at the Australia New Zealand Evaluation Association conference.	4 November 2024
Agency Speech: NZ Policy Research Institute	Craig Jones is a keynote speaker at the New Zealand Policy Research Institute symposium.	7 November 2024
Agency communication opportunity: Mihi Whakataui for Andrew Coster	Andrew Coster will be welcomed as the permanent Secretary for Social Investment with a Mihi Whakataui on 11 November.	11 November 2024
Agency Event: INFNZ Social Investment	ANZ are hosting an event on behalf of Institute of Finance Professionals New Zealand Inc. (INFNZ) and have asked SIA (Alistair Mason) to speak at the event to provide an overview of social investment	19 November 2024

9(2)(f)(iv)



Weekly Report – Week ending 18 October 2024

Date: 18 October 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-108

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 18 October 2024.

9(2)(f)(iv)

9(2)(f)(iv)



Social Investment Fund

9(2)(f)(iv)



Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

Upcoming Cabinet papers	
Status	Integrated Data and Social Investment draft Cabinet paper
Description	Cabinet invited you and Minister Bayly to report back with detailed recommendations for the data and evidence infrastructure required for social investment. We continue to work with Stats NZ to develop this Cabinet paper.

BUDGET SENSITIVE

Our advice to Stats NZ has been to clearly align the actions in the paper with your ambition for social investment – focusing it on the improvements needed to the IDI to support the social investment approach, identifying the need to get data in a consistent format, of sufficient quality (not necessarily ‘top quality’) into the IDI quickly, and improving social service providers’ access to data from the IDI to support their work. 9(2)(f)(iv)

The draft Cabinet paper has been sent to Minister Bayly for consideration. We anticipate that Minister Bayly will seek your views on the Cabinet paper shortly.

With both this and the Work Programme Cabinet papers now drafted, there is the opportunity to take these to SOU at the same time. We will discuss timing further with your office.

Contact	Rebecca Hollingsworth, 9(2)(a) Manager, Policy and Insights
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Social Investment Ministers Group

Status	Follow-up from 14 October meeting underway; preparation for 11 November meeting begun
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Description	At the Social Investment Ministers Group meeting on 14 October, Ministers agreed, among other things, to the social outcomes contract framework, providing mandate for our ongoing work to establish social investment outcomes contracts, as noted above. You also instructed us to work with the Ministry of Education (MoE) to ensure contracts across the system are well aligned. We have made initial contact with MoE officials and will work with them on the design of their contracts, as appropriate.
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We are now planning for your next meeting, scheduled for 11 November, and are working with your office to draft an agenda for this meeting. Our initial proposal for an agenda includes:

- Introduce the new CE of the Social Investment Agency and the Social Investment Board Chair (the whole Board is unlikely to have met by then)
- Budget 2025 discussion (invitation letters should have been issued)
- Updates/discussion:
 - » Social Investment Fund (design)
 - » Outcomes contracts.
- Updates from other Ministers, e.g.
 - » Minister of Education approach to outcomes contracting
 - » Minister Seymour would like to present work done by ERO on attendance

Contact	Rebecca Hollingsworth, 9(2)(a) Manager, Policy and Insights
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Social Investment Board

Status	Board membership is being finalised by your office
Description	We understand your office is undertaking further engagement to finalise the membership of the Social Investment Board. The next step in this process will be finalising, and submission, of a paper seeking Cabinet approval of the Board members, including the Chair through APH or Cabinet Business Committee. We now estimate the first Board meeting will be in early November 2024.
Contact	Craig Sengelow, 9(2)(a) Principal Advisor, Governance

Other updates

Social Investment Hui

Status	Progressing the arrangements for the Social Investment Hui
Description	We are continuing to prepare for the Social Investment Hui, to be held on 15 November. We are expecting to get invitations out this week and continue to confirm speakers.
Contact	Kirsty Anderson, 9(2)(a) Manager, Office of the Chief Executive

SIA Insights on Government Targets

Status	We have completed IDI work on Government Targets to align with quarterly reporting
Description	As discussed with you, we have been working with the Delivery Unit at DPMC to provide analytical support for reporting on Government Targets. As part of this work, we have developed a cross-cutting insights briefing (attached), based on IDI analysis. The key findings of the work are: • Around 1/3 of New Zealanders are in scope of the targets in a 12-month period. • Most of these are confined to one target area and there is relatively little overlap in target populations outside of Health and Education. • People who are the victims of crime or using Emergency Housing are more likely to appear in other targets, but half of them will not. • People living in a household with recent family violence, receiving mental health treatment, or interacting with Oranga Tamariki Care and Protection are more likely to be in target populations but represent a small proportion of those populations. • There is regional variation in target performance, with some regions indicated across the board. However, target achievement largely depends on success in the most heavily populated regions. Future analysis could include identifying local 'hot spots' for focusing support to deliver outcomes aligned with one or more targets and identifying opportunities for early intervention with specific groups to reduce their likelihood of entering target populations. This analysis may also support the development of social investment initiatives for Budget 2025 and potential targets for the Social Investment Fund. We are working with DPMC to understand which future products would be most helpful for them and for lead agencies in supporting target delivery, at both the national and local levels.

BUDGET SENSITIVE

The analysis was limited by the availability of data in some key areas. We are working with Stats NZ to improve the quality and timeliness of IDI data relating to targets as a priority.

Contact Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Mental Health Innovation Fund

Status Providing advice to Health NZ on assessing applications

Description Health New Zealand are currently assessing applications to the Mental Health and Addiction Community Sector Innovation Fund. One of the selection criteria for initiatives is that they can evidence positive social return on investment (SROI). They have talked us through their proposed approach to assessing this, which has involved using the Value Measurement Standards. We agree their assessment is aligned with these standards.

9(2)(g)(i)

Contact Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: How the Social Investment Board may support you and initial Ministerial priorities	This briefing suggests priority areas for discussion for the Social Investment Board.	17 October 2024
9(2)(f)(iv)		

BUDGET SENSITIVE

Briefing: Social Investment Fund - Approach to engagement	This briefing will propose our approach to engagement as part of the Fund's development.	17 October 2024
Briefing: Draft Strategic Intentions	This briefing has a draft 'plan on a page' to test as input to the Strategic Intentions document	17 October 2024
Briefing: Social Investment Fund Implementation and delivery	This briefing will discuss next steps in the implementation of the Fund.	24 October 2024
Briefing: Social Investment Contracts prototyping update	This briefing provides an update on joint work between MSD and SIA to prototype social investment outcomes contracts.	31 October 2024
Briefing: Performance Plan	The briefing will be provided following feedback on the Strategic Intentions document.	31 October 2024

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
9(2)(a) [redacted], member of the public	Fortnightly reports relating to engagement. Social Wellbeing Agency briefings from February- June 2024, Quarter 3 and 4 reports.	5 November 2024
9(2)(a) [redacted] Labour Leaders	Advice or briefings related to family violence/sexual violence since November 23 to October 2024	13 November 2024

Cabinet Papers we have been consulted on

Topic	Comment
N/A	No Cabinet papers consulted on - no further action

Upcoming engagement and communications

Opportunity	Description	Date
Speech: IPANZ Public Sector Conference	A draft speech was provided to your office on 16 October.	24 October 2024
Announcement: Board appointments	We will provide a draft communications material for your office's consideration following lodgement of the cabinet paper.	30 October 2024
Agency Speech: ANZEA Conference	Aphra Green is a keynote speaker at the Australia New Zealand Evaluation Association conference.	4 November 2024
Agency Speech: NZ Policy Research Institute	Craig Jones is a keynote speaker at the New Zealand Policy Research Institute symposium.	7 November 2024
Agency Event: Social Investment Hui	An opportunity for a wider discussion on social investment with stakeholders.	15 November 2024
Agency Event: INFINZ Social Investment	ANZ is hosting an event on behalf of Institute of Finance Professionals New Zealand Inc. (INFINZ) and have asked SIA (Alistair Mason) to speak at	19 November 2024

BUDGET SENSITIVE

	the event to provide an overview of social investment.	
Event: Philanthropy & Government Forum	An opportunity to introduce Andy Coster, possibly you as Minister for Social Investment to speak, and for SIA to provide an overview of SI Fund programme of work.	29 November 2024
Event: Communities Webinar	We are working with peak bodies and your office to find a date for you to speak to communities at a lunchtime webinar. Members include those who work at a grassroots level to support services including Volunteering NZ, trusts, and smaller foundations.	November/ December 2024

9(2)(f)(iv)

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Weekly Report – Week ending 25 October 2024

Date: 25 October 2024
Security level: Budget Sensitive
To: Hon Nicola Willis, Minister for Social Investment
Tracking Number SIA24/25-117

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 25 October 2024.

9(2)(f)(iv)

9(2)(f)(iv)

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

Upcoming Cabinet papers

Status	Draft Integrated Data Cabinet paper released for departmental and agency consultation
Description	Cabinet invited you and Minister Bayly to report back with detailed recommendations for the data and evidence infrastructure required for social investment. We continue to work with Stats NZ to develop this Cabinet paper.

BUDGET SENSITIVE

The Cabinet paper has been circulated to Ministers and departments for consultation, with comments sought by 1 November 2024.

9(2)(f)(iv)

Contact

Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

9(2)(f)(iv)

Social Investment Board

Status

Further conversations regarding Board membership are being undertaken by your office

Description

We understand your office is completing engagement to finalise the membership of the Social Investment Board. Cabinet endorsement will be sought following this. Your office has set aside time in your diary to meet with the Board on Thursday 14 November, the day before the Social Investment Hui. Prior to this meeting we will discuss with you the initial focus areas and how the Board will provide advice to you. We have provided a briefing on these priorities (SIA 2425-057).

Contact

Craig Sengelow, 9(2)(a)
Principal Advisor, Governance

Other updates

Social Investment Hui

Status

Update on planning for the Hui

Description

Invitations have been sent to over 70 stakeholders and we have had great interest from people wishing to attend the Hui. We are continuing to finalise the speakers and programme and you will receive a full event briefing on 7 November 2024.

Contact

Kirsty Anderson, 9(2)(a)
Manager, Office of the Chief Executive

Maternal mental health

Status	IDI analysis underway
Description	Child Wellbeing and Poverty Reduction group at MSD has asked for analytical support for their upcoming Child and Youth Ministerial Group meeting in early December. The focus for the meeting is on maternal mental health which is one of the priority areas of their updated investment strategy. We will build on the Impact Reviews IDI analysis on the Children with Adverse Childhood experiences (ACEs) in the first 2000 days which had parental mental health as an ACE indicator. The analysis will identify size of the cohort, describe the factors associated with maternal mental conditions, identify outcomes over time, and describe the characteristics of children whose mothers have mental health conditions. We expect to deliver this analysis in early November. If interested, we can share our findings with your office.
Contact	Tahia Eaquib, 9(2)(a) Manager Analytics (acting) and Data Systems

Ngāti Toa - Hāpu Māmā

Status	IDI analysis underway
Description	Ngāti Toa has requested analytical support for their Te Wāhi Tiaki Tātou: Manaaki Māmā Project. Te Wāhi Tiaki Tātou aims to transform health and well-being services for the Porirua community. The IDI analysis will look at a range of health, educational engagement, employment, safety, economic and housing indicators related to Hapū Māmā in Porirua. The analysis will identify cohorts that need support and inform their investment decision. We expect to deliver this analysis by in early February 2025. If interested, we can share our findings with your office.
Contact	Tahia Eaquib, 9(2)(a) Manager Analytics (acting) and Data Systems

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: Social Investment Fund - Approach to engagement	This briefing will propose our approach to engagement as part of the Fund's development.	23 October 2024
Briefing: Performance Plan	The briefing will be provided following feedback on the Strategic Intentions document.	23 October 2024
Briefing: Social Investment Fund Implementation and delivery	This briefing will discuss next steps in the implementation of the Fund.	31 October 2024
Briefing: Next steps SIA/MSD social investment contract prototypes	This briefing provides an update on joint work between MSD and SIA to prototype social investment outcomes contracts.	31 October 2024

BUDGET SENSITIVE

Briefing: Strategic Intentions Initial Draft 9(2)(f)(iv)	This briefing will provide an early draft of Strategic Intentions.	31 October 2024
Briefing: Funding options for the IDI	This briefing provides funding options for the IDI. (It is possible that this advice is delivered through a planned Stats NZ briefing to Ministers)	1 November 2024
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	7 November 2024

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Member of the public	Fortnightly reports relating to engagement. Social Wellbeing Agency briefings from February- June 2024, Quarter 3 and 4 reports.	5 November 2024
Labour Leader's Office	Advice or briefings related to family violence/sexual violence since November 23 to October 2024	13 November 2024
Member of the public	Provide data on the COVID steering group on the 'Unvaccinated Population'	15 November 2024
Member of the public	Reviews of restructurings carried out in the Agency	18 November 2024

Cabinet Papers we have been consulted on

Topic	Comment
Stronger responses for children with serious and persistent offending behaviour (Minister for Children)	This draft paper updates Cabinet on legislative and operational options to strengthen the Government's response to children aged 10-13 years old with serious and persistent offending behaviour in the Family Court. The paper made the claim that "These proposals are a valuable social investment". Our comments were that not enough was done to demonstrate how the proposals represented a 'valuable social investment'. We also suggested that the proposals seemed to be good candidates for provision of support via social investment outcomes contracting and that this option be considered through implementation stages of the policy. We further recommended more be done to demonstrate how the impact of the proposals will be monitored and measured.

Upcoming engagement and communications

Opportunity	Description	Date
Announcement: Board appointments	We will provide draft communications material for your office's consideration following lodgement of the cabinet paper.	4 November 2024
Agency Speech: ANZEA Conference	Aphra Green is a speaker at the Australia New Zealand Evaluation Association conference.	4 November 2024
Agency Speech: NZ Policy Research Institute	Craig Jones is a keynote speaker at the New Zealand Policy Research Institute symposium.	7 November 2024
Event: Social Investment Hui	An opportunity for a wider discussion on social investment with stakeholders.	15 November 2024
Agency Event: INFINZ Social Investment	ANZ is hosting an event on behalf of Institute of Finance Professionals New Zealand Inc. (INFINZ) and have asked SIA (Alistair Mason) to speak at the event to provide an overview of social investment.	19 November 2024
Event: Philanthropy & Government Forum	An opportunity to introduce Andy Coster, possibly you as Minister for Social Investment to speak, and for SIA to provide an overview of SI Fund programme of work.	29 November 2024
Event: Communities Webinar	We are working with your office to find a date for you to speak to communities at a lunchtime webinar. Members include those who work at a grassroots level to support services including Volunteering NZ, trusts, and smaller foundations. This is an opportunity to speak directly to the sector, and answer any questions.	November/ December 2024

9(2)(f)(iv)



Weekly Report – Week ending 1 November 2024

Date: 1 November 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-122

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 1 November 2024.

9(2)(f)(iv)

9(2)(f)(iv)



Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

Upcoming Cabinet papers

9(2)(f)(iv)



9(2)(f)(iv)

Social Investment Board

Status

Preparing for first meeting of the Board 14 November

Description

The Board appointment paper is expected to be approved by Cabinet on Monday 4 November. A communications plan and draft press release to announce the Board has been sent to your office for consideration.

We are currently preparing for the first Board meeting. This will take place on 14 November, one day prior to the Social Investment Hui. The Board will be invited to participate in the Hui once the appointments are confirmed. At this stage, we expect Board meetings to take place monthly and in-person.

We have briefed you on suggested working arrangements with the Board, including setting out initial priority areas for the Board.

Contact

Craig Sengelow, 9(2)(a)
Principal Advisor, Governance

Other updates

Social Investment Hui

Status

Update on planning for the Hui

Description

We have received over 60 acceptances for the Hui and are waiting to hear from other invitees. We have sent invitations to social sector Chief Executives for them or a delegate to attend the Hui. This week we are finalising the programme, including confirming the speaker from the Victorian Department of Treasury and Finance, and confirming the themes for the roundtable discussions for the afternoon sessions at the Hui. We have invited Treasury officials to attend the Hui.

Contact

Kirsty Anderson, 9(2)(a)
Manager, Office of the Chief Executive

Diversity, Equity and Inclusion Plan

Status

In progress

Description

The Agency has an annual requirement to update and publish its Diversity, Equity and Inclusion Plan. We are currently finalising the Plan which describes our commitments

BUDGET SENSITIVE

under the public service's plans for diversity, equity and inclusion. We will publish the final plan on our website on 15 November 2024 and will send it to the Public Service Commission.

Contact Catherine Williams, 9(2)(a)
Director, Office of the Chief Executive

Upcoming Papers

Briefings and reports

Title	Description	Due date
Noting paper: Discovering Communities Regional Data Tool	This noting paper is to share with your colleagues.	31 October 2024
Briefing: Next steps SIA/MSD social investment contract prototypes	This briefing provides an update on joint work between MSD and SIA to prototype social investment outcomes contracts.	31 October 2024
Briefing: Strategic Intentions Initial Draft	This briefing will provide an early draft of Strategic Intentions.	31 October 2024
Briefing: Social Investment Ministers Group November meeting pack	This briefing presents a draft agenda and attachments for consideration for the meeting scheduled 14 November.	31 October 2024
Aide memoire: Funding options for the IDI	This briefing provides funding options for the IDI. (It is possible that this advice is delivered through a planned Stats NZ briefing to Ministers.)	1 November 2024
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	7 November 2024
9(2)(f)(iv)		

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Member of the public	Fortnightly reports relating to engagement. Social Wellbeing Agency briefings from February- June 2024, Quarter 3 and 4 reports.	5 November 2024
Labour Leader's Office	Advice or briefings related to family violence/sexual violence since November 23 to October 2024	13 November 2024
Member of the public	Provide data on the COVID steering group on the 'Unvaccinated Population'	15 November 2024
Member of the public	Reviews of restructurings carried out in the Agency	18 November 2024

Cabinet Papers we have been consulted on

Topic	Comment
N/A	No Cabinet papers consulted on - no further action

Upcoming engagement and communications

Opportunity	Description	Date
Announcement: Board appointments	We will provide draft communications material for your office's consideration following lodgement of the Cabinet paper.	4 November 2024
Agency Speech: OECD Forum (Rome, Italy)	Verity Warn, a former staff member currently studying in Europe, will be presenting, on SIA's behalf, on our Older Peoples' experience of vulnerability and multiple disadvantage project. The project is an example of how integrated data can enable a multidimensional picture of wellbeing.	4 November 2024
Agency Speech: ANZEA Conference	Zach Penman is a speaker at the Australia New Zealand Evaluation Association conference.	4 November 2024
Agency Speech: NZ Policy Research Institute	Craig Jones is a keynote speaker at the New Zealand Policy Research Institute symposium.	7 November 2024
Event: Social Investment Hui	An opportunity for a wider discussion on social investment with stakeholders.	15 November 2024
Agency Event: INFINZ Social Investment	ANZ is hosting an event on behalf of Institute of Finance Professionals New Zealand Inc. (INFINZ) and have asked SIA (Alistair Mason) to speak at the event to provide an overview of social investment.	19 November 2024
Event: Philanthropy & Government Forum	An opportunity to introduce Andrew Coster, possibly you as Minister for Social Investment to speak, and for SIA to provide an overview of Social Investment Fund programme of work. We are working with your office to confirm your availability	29 November 2024
Event: Communities Webinar	We are working with your office to find a date for you to speak to communities at a lunchtime webinar. Members include those who work at a grassroots level to support services including Volunteering NZ, trusts, and smaller foundations. This is an opportunity to speak directly to the sector, and answer any questions.	November/ December 2024

9(2)(f)(iv)



Weekly Report – Week ending 8 November 2024

Date: 8 November 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-126

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 8 November 2024.

9(2)(f)(iv)

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

9(2)(f)(iv)

9(2)(f)(iv)

Social Investment Board

Status	Preparing for first meeting of the Board 14 November
Description	The Board has now been appointed and will meet for the first time on Thursday 14 November. You are scheduled to attend for part of the meeting. You may like to use this time to set out your priorities for them, and to hear initial thoughts from them on how they are seeking the development of social investment and how they can assist you. All but one Board member will be able to attend the Social Investment Hui the following day.
Contact	Craig Sengelow, 9(2)(a) Principal Advisor, Governance

Other updates

Social Investment Hui

Status	Update on the Social Investment Hui
Description	We are in the final stages of the Hui planning and confirming all of the arrangements. We have over 75 stakeholders confirmed as attending. We will send reminders to stakeholders early next week. Your office will also receive the event briefing this week.
Contact	Kirsty Anderson, 9(2)(a) Manager, Office of the Chief Executive

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	14 November 2024
Briefing: Social Investment Fund Implementation and delivery	9(2)(f)(iv)	14 November 2024
Briefing: Strategic Intentions Initial Draft	This briefing will provide an early draft of Strategic Intentions.	14 November 2024

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Labour Leader's Office	Advice or briefings related to family violence/sexual violence since November 23 to October 2024	13 November 2024
Member of the public	Provide data on the COVID steering group on the 'Unvaccinated Population'	15 November 2024
Member of the public	Fortnightly reports relating to engagement. Social Wellbeing Agency briefings from February- June 2024, Quarter 3 and 4 reports.	2 December 2024
Member of the public	Data usage on Education Review Office report, <i>"Left Behind: How do we get our chronically absent students back to school?"</i>	2 December 2024
Taxpayers' Union	Carbon neutral public service targets.	4 December 2024

Cabinet Papers we have been consulted on

Topic	Comment
LEG Cabinet paper- Ministry of Education (Early Learning Cabinet paper)	Social Investment Agency did not comment on this paper. We note the paper is for the Cabinet Legislative Committee with policy decisions taken by Cabinet 4 November.

Upcoming engagement and communications

Opportunity	Description	Date
Event: Mihi whakatau for Andy Coster	You are invited to attend and speak at Andy Coster's mihi whakatau	11 November 2024
Event: Social Investment Hui	An opportunity for a wider discussion on social investment with stakeholders.	15 November 2024
Agency Event: INFINZ Social Investment	ANZ is hosting an event on behalf of Institute of Finance Professionals New Zealand Inc. (INFINZ) and have asked SIA (Alistair Mason) to speak at the event to provide an overview of social investment.	19 November 2024
Event: Philanthropy & Government Forum	An opportunity to introduce Andrew Coster, possibly you as Minister for Social Investment to speak, and for SIA to provide an overview of Social Investment Fund programme of work. We are working with your office to confirm your availability	29 November 2024

BUDGET SENSITIVE

Event: Communities Webinar

We are working with your office to find a date for you to speak to communities at a lunchtime webinar. Members include those who work at a grassroots level to support services including Volunteering NZ, trusts, and smaller foundations. This is an opportunity to speak directly to the sector, and answer any questions.

November/
December 2024

9(2)(f)(iv)

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Weekly Report – Week ending 15 November 2024

Date: 15 November 2024
Security level: Budget Sensitive
To: Hon Nicola Willis, Minister for Social Investment
Tracking Number SIA24/25-127

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 15 November 2024.

Priorities

9(2)(f)(iv)

9(2)(f)(iv)



9(2)(f)(iv)



Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

9(2)(f)(iv)

Social Investment Board

Status	The Board held its first meeting on 14 November
Description	The Board held the first meeting on Thursday 14 November. A summary of the minutes once agreed by the Chair will be provided to your office. The Board will also attend the Social Investment Hui on 15 November and facilitate the round table discussions in the afternoon session. The Board intends to meet again mid-December 2024. A summary of the minutes once agreed by the Chair will be provided to your office.
Contact	Craig Sengelow, 9(2)(a) Principal Advisor, Governance

Other updates

Maternal mental health analysis

Status	We have produced some analysis looking at maternal mental health, which is due to be discussed at the upcoming Child and Youth Strategy Ministerial Group
Description	The Child Wellbeing and Poverty Reduction Group (MSD) commissioned a short analysis on what we know about the group of young children whose mothers experience mental health issues. We found: • Children of mothers with mental illness are 1.5 times more likely to have other adverse childhood experiences • In particular, these children are 4 times more likely to experience sexual violence, 2.7 times more likely to have a father with mental illness, and twice as likely to have incarcerated parents • Children of mothers with mental illness were much more likely to later experience negative outcomes by age 23, including serious youth offending, family violence, emergency housing, school non-attendance, imprisonment and benefit receipt.

BUDGET SENSITIVE

The Child and Youth Strategy Ministerial Group are meeting on 3 December, where Ministers Upston and Doocey are leading a discussion on maternal mental health. It is planned that the SIA slides will be sent to the group in advance of the meeting, but the discussion will focus on effective approaches to maternal mental health, as opposed to the SIA analysis.

You have been invited to the Ministerial Group meeting and SIA officials will attend the meeting to support the discussion as necessary. We will share the report to you next week.

Contact

Andrew Webber, 9(2)(a)
Chief Economist

9(2)(f)(iv)

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: Social Investment Fund Implementation and delivery	9(2)(f)(iv)	21 November 2024
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	December 2024

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Member of the public	Fortnightly reports relating to engagement. Social Wellbeing Agency briefings from February - June 2024, Quarter 3 and 4 reports.	2 December 2024
Member of the public	Data usage on Education Review Office report, "Left Behind: How do we get our chronically absent students back to school?"	2 December 2024
Taxpayers' Union	Carbon neutral public service targets.	4 December 2024
Labour Leader's Office	Advice or briefings related to family violence/sexual violence since November 2023 to October 2024	11 December 2024
Member of the public	Provide data on the COVID steering group on the 'Unvaccinated Population'	13 December 2024

Cabinet Papers we have been consulted on

Topic	Comment
9(2)(f)(iv)	
Report back on: People in Mental Distress Presenting via 111:	Feedback is due by 18 November 2024 – we are considering our response.

Transitioning to a Multi-Agency Response

Māori Education Action Plan	We are working with Education on this paper – it proposes to invite the Social Investment Agency and the Ministry of Education to jointly explore the approach to strengthening outcomes contracting of Alternative Education.
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Upcoming engagement and communications

Opportunity	Description	Date
Meeting: Social Investment Board	Your first engagement with the Board, your office advised they will take a photo for social media	14 November 2024
Event: Social Investment Hui	An opportunity for a wider discussion on social investment with stakeholders.	15 November 2024
Event: Communities Webinar	You are speaking and taking questions with the Communities sector, who are very interested in the social investment approach and how it might impact them. Members include those who work at a grassroots level to support services including Volunteering NZ, trusts, and smaller foundations. This is an opportunity to speak directly to the sector, and answer any questions. We will provide an aide-memoire with further information to your office	26 November 2024
Event: Philanthropy & Government Forum	An opportunity to introduce Andrew Coster and for SIA to provide an overview of Social Investment Fund programme of work.	29 November 2024

9(2)(f)(iv)



Weekly Report – Week ending 22 November 2024

Date: 22 November 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-130

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 22 November 2024.

Priorities

9(2)(f)(iv)

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Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

9(2)(f)(iv)

Social Investment Board	
Status	First Board meeting
Description	The Board were energised from both their first meeting on 14 November 2024 and the Social Investment Hui on the following day. The focus of the Board's meeting was to hear your priorities as well as hearing from each other on their views on social investment. The Board also discussed priorities for providing advice to you, including the need for a social investment roadmap. The Board were introduced at the Hui by the Chair and facilitated the hui discussions in the afternoon session. Their next meeting is planned for 9 December 2024.
Contact	Craig Sengelow, 9(2)(a) Principal Advisor, Governance

Upcoming Papers

Briefings and reports

Title	Description	Due date
Aide-Memoire: Supporting material for Communities Webinar 26 November	This aide-memoire provides information, talking points and Q&A material for your upcoming webinar	20 November 2024
Briefing: Social Investment Fund Implementation and delivery	9(2)(f)(iv)	28 November 2024
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	Mid December 2024

BUDGET SENSITIVE

Briefing: Examples of International Funds investing in social outcomes (Finnish example)	This briefing provides an overview and lessons learnt from overseas examples of significant funds investing in social outcomes.	Mid December 2024
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OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Member of the public	Fortnightly reports relating to engagement. Social Wellbeing Agency briefings from February - June 2024, Quarter 3 and 4 reports.	2 December 2024
Member of the public	Data usage on Education Review Office report, <i>"Left Behind: How do we get our chronically absent students back to school?"</i>	2 December 2024
Taxpayers' Union	Carbon neutral public service targets.	4 December 2024
Labour Leader's Office	Advice or briefings related to family violence/sexual violence since November 2023 to October 2024	11 December 2024
Member of the public	Provide data on the COVID steering group on the 'Unvaccinated Population'	13 December 2024
Taxpayers' Union	The total budgeted for Christmas/New Year bonuses to staff this year.	16 December 2024
Taxpayers' Union	The total times adult entertainment websites have been blocked by your agency's web filter, on staff devices or any work environment. A breakdown of these figures by month.	16 December 2024
Member of the public	The cost breakdown of the welcome for the new Chief Executive and Secretary of Social Investment	17 December 2024
Member of the Freedom Party	Background to our vaccination research in 2021	18 December 2024

Cabinet Papers we have been consulted on

Topic	Comment
9(2)(f)(iv)	
Report back on: People in Mental Distress Presenting via 111: Transitioning to a Multi-Agency Response	We suggested strengthened monitoring of the outcomes of this change, and a focus on prevention to stem the flow of people into mental health crisis.
Māori Education Action Plan	This paper asks MOE and SIA to work together on options to prototype outcomes contracting for Alternative Education.

Upcoming engagement and communications

Opportunity	Description	Date
Event: Communities Webinar	You are speaking and taking questions with the Communities sector, who are very interested in the social investment approach and how it might impact them. Members include those who work at a grassroots level to support services including Volunteering NZ, trusts, and smaller foundations. This is an opportunity to speak directly to the sector, and answer any questions. We have provided an aide-memoire with further information to your office	26 November 2024
Agency Event: Philanthropy & Government Forum	An opportunity to introduce Andrew Coster and for SIA to provide an overview of Social Investment Agency programme of work.	29 November 2024
Agency Release: Regional Data Tool	We are aiming to publish the regional data tool on our website before the end of the year. A communications plan and note for other ministers' offices will come over later this month.	December TBC



Weekly Report – Week ending 29 November 2024

Date: 29 November 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA24/25-134

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 29 November 2024.

Priorities

9(2)(f)(iv)

9(2)(f)(iv)

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

Upcoming Cabinet papers

9(2)(f)(iv)

Social Investment Board

Status Second Board meeting

Description The second Board meeting, scheduled for the 9 December 2024, will focus on the development of the social investment roadmap. It is also expected to include a focus on Budget 25, data infrastructure and outcomes contracting.

Contact Craig Sengelow, 9(2)(a)
Principal Advisor, Governance

Other updates

Dingle Foundation proposal

Status SIA drafting response to proposal

Description The Graeme Dingle Foundation has sent you a proposal seeking a partnership between the Government and the Foundation to drive positive outcomes for young people and communities. The proposal seeks multi-year funding, working towards baseline funding and to use the Social Investment Fund.

We are drafting a short response for your consideration. This draft response will advise that you are not in a position to accept the proposal. The response will provide an update on the Social Investment Fund.

Contact Rebecca Hollingsworth, 9(2)(a)
Manager, Policy and Insights

Iwi engagement on social investment

Status Significant demand from iwi across a range of areas

Description We are facing significant demand from iwi for engagement in the design of the social investment system, further engagement on social investment, and bespoke data requests. In particular:

- Following the National Iwi Chairs' Forum, we have provided text for the PM's response to their follow-up correspondence. This text is based on your previous letter to the Iwi Chairs.
- We received a letter from the Pou Tangata Chair and CE lead Debbie Power noting their intent to delay the proposed social investment symposium to early next year – our view is that we need to lead this engagement to enable it to be well-coordinated with your engagements.
- Following the hui we have had follow-up requests from iwi – we are going to work with Stats NZ and the Data Iwi Leaders' Group on how best to meet iwi data needs.
- Following the Hui we met with Amohaere Houkamou to discuss how best to engage with the Iwi Social Investment Design Group.

We are mindful of the need to manage expectations while also harnessing the significant enthusiasm within iwi to partner on a social investment approach.

Contact Aphra Green, DCE Policy, Data and Insights
9(2)(a)

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing: Social Investment Fund Implementation and delivery	9(2)(f)(iv)	5 December 2024
Briefing: Examples of International Funds investing in social outcomes (Finnish example)	This briefing provides an overview and lessons learnt from overseas examples of significant funds investing in social outcomes.	5 December 2024
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	12 December 2024
9(2)(f)(iv)		

OIA requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Member of the public	Fortnightly reports relating to engagement. Social Wellbeing Agency briefings from February - June 2024, Quarter 3 and 4 reports.	2 December 2024
Taxpayers' Union	Carbon neutral public service targets.	4 December 2024
Labour Leader's Office	Advice or briefings related to family violence/sexual violence since November 2023 to October 2024	11 December 2024
Taxpayers' Union	The total times adult entertainment websites have been blocked by your agency's web filter, on staff devices or any work environment. A breakdown of these figures by month.	16 December 2024
Member of the public	The cost breakdown of the welcome for the new Chief Executive and Secretary of Social Investment	17 December 2024
Leader NZ Outdoors and Freedom Party	Research into unvaccinated rates	18 December 2024
Member of the public	Data usage on Education Review Office report, <i>"Left Behind: How do we get our chronically absent students back to school?"</i>	24 December 2024

Ministerial correspondence

Requester	Topic	Due date to requestor
Graeme Dingle Foundation	Delivering on the services and priorities that matter to New Zealanders	28/11/2024
Tautoko Tāne	Social Investment rebuilding lives of male survivors	29/11/2024
Habilis NZ Ltd	Social Investment successes for Pharmac and the community	5/12/2024

Cabinet papers we have been consulted on

Topic	Comment
Policy work to improve the sustainability of Disability Support Services	We provided a brief comment on this paper. This was that we think the paper would benefit from a stronger focus on monitoring and understanding the impact of changes on outcomes for disabled peoples.
9(2)(f)(iv)	[REDACTED]

Upcoming engagement and communications

Opportunity	Description	Date
Agency Event: Philanthropy & Government Forum	SIA and Philanthropy NZ co-host the Philanthropy NZ-Government Forum quarterly. This will be an opportunity for Andrew Coster to meet the sector, and for SIA to provide an overview of Social Investment Agency programme of work. Dr Graham Scott has also been asked to speak.	29 November 2024
Agency participation: Launch of the inaugural Ethnic Indicators report	Ministry for Ethnic Communities will be launching "Ethnic Evidence - Increasing the visibility and value of New Zealand's diversity". This report aims to raise the visibility of Ethnic Communities to ensure that data and evidence is drawn into public policy and service delivery. SIA has been invited to take part in a panel discussion alongside Professor Edwina Pio, Dr James To -National Secretary for the NZ Chinese Association, and Pratima Namasivayam – DCE Ministry for Ethnic Communities.	09 December 2024

BUDGET SENSITIVE

Agency Release: Regional Data
Tool

We are aiming to publish the regional data tool on our website before the end of the year. A communications plan and note for other ministers' offices will come over to your press secretary later this month.

December TBC

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Weekly Report – Week ending 6 December 2024

Date:	6 December 2024
Security level:	Budget Sensitive
To:	Hon Nicola Willis, Minister for Social Investment
Tracking Number	SIA 24/25-140

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 6 December 2024.

9(2)(f)(iv)

9(2)(f)(iv)

Contact Aphra Green, 9(2)(a)
Deputy Chief Executive, Policy, Data and Insights

Social Investment Fund

Status Work progressing on Fund design, implementation work programme, approach to initial investments, and approach to engagement.

Description We are preparing a briefing setting out the plan for implementation and delivery of the Fund. This will outline the approach to an incubation phase, managed by the Agency, including any early decisions that may be needed to facilitate this. The briefing will also propose advice and decision-making processes for investments during the incubation phase: 9(2)(f)(iv)

Contact Alistair Mason, 9(2)(a)
Deputy Chief Executive, Investment and Delivery

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

9(2)(f)(iv)

Social Investment Board

Status	Meeting with the Board Chair on the 12 December
Description	Following the second Social Investment Board meeting on the 9 December, you are meeting with the Board Chair on the 12 December. This will be your first meeting with the Chair since the Board first met on 14 November. This is expected to be the first of a series of regular meetings with the Chair as he keeps you up to date with Board progress.
Contact	Craig Sengelow, 9(2)(a) Principal Advisor, Governance

Strategic Intentions document

Status	Publishing the Strategic Intentions 2024 – 2029 document
Description	We will work with your office to ensure our Strategic Intentions 2024 – 2029 document is ready for publication and prepared for presentation in Parliament
Contact	Sarah O’Grady, 9(2)(a) Acting Director, Office of the Chief Executive

Upcoming Papers

Briefings and reports

Title	Description	Due date
Briefing; Final Strategic Intentions document 9(2)(f)(iv)	This briefing is the final sign-off for the 2024-2029 Strategic Intentions.	11 December 2024
Briefing: International approaches to social impact investment (including Finland)	This briefing will provide information on international approaches to social impact investment.	18 December 2024
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	18 December 2024

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Labour Leader’s Office	Advice or briefings related to family violence/sexual violence since November 2023 to October 2024	11 December 2024
Member of the public	The cost breakdown of the welcome for the new Chief Executive and Secretary of Social Investment	17 December 2024

BUDGET SENSITIVE

Leader NZ Outdoors and Freedom Party	Research into unvaccinated rates	18 December 2024
Ministerial OIAs		
Member of the public	Numbers of Ministerial/Departmental Items received between 15 May 2024 and 15 November 2024, by the Minister's office and broken down by timeframes	13 December 2024
Office of Francisco Hernandez	All correspondence and advice sent or received by the Minister or their staff, regarding the Carbon Neutral Government Programme, since 27 November 2023.	13 January 2025
Member of the public	Access to 2024 Cabinet papers on social investment	22 January 2025

Cabinet Papers we have been consulted on

Topic	Comment
	SIA has not provided comment through agency consultation on any draft Cabinet papers this week.

Upcoming engagement and communications

Opportunity	Description	Date
Agency participation: Launch of the inaugural Ethnic Indicators report	Ministry for Ethnic Communities will be launching "Ethnic Evidence - Increasing the visibility and value of New Zealand's diversity". This report aims to raise the visibility of Ethnic Communities to ensure that data and evidence is drawn into public policy and service delivery. SIA has been invited to take part in a panel discussion alongside Professor Edwina Pio, Dr James To - National Secretary for the NZ Chinese Association, and Pratima Namasivayam – DCE Ministry for Ethnic Communities.	9 December 2024
Agency Release: Regional Data Tool	We are aiming to publish the regional data tool on our website before the end of the year. A communications plan and note for other Ministers' offices was sent to your office on 4 December.	13 December 2024
9(2)(g)(i)		
Pou Tangata Social Investment Symposium	We will engage in the new year with Pou Tangata and MSD on leading planning for the Symposium.	TBC February 2025
Social Investment Hui 2.0	Planning will commence shortly for a second Hui, likely in Auckland for March next year.	TBC March 2025



Weekly Report – Week ending 13 December 2024

Date: 13 December 2024

Security level: Budget Sensitive

To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA 24/25 - 143

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 13 December 2024

9(2)(f)(iv)

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

Lead and build the system

You set out in your Accelerating Social Investment Cabinet paper key changes that will support you to implement change.

Social Outcomes Contracting Prototypes	
Status	Work progressing on design and prototype
Description	Discovery and design work update SIA work with providers to develop a template contract and guidance is nearing completion, with discussions underway with these providers about next steps. It is anticipated that one provider will move straight into prototype contracting as part of the joint work with MSD. Prototype update SIA and MSD provided lead agencies with guidance to support engagement with delivery partners and further information on the prototype process. Lead agencies have engaged with proposed iwi partners and providers. Of the six delivery partners engaged, two have agreed to participate, one has declined, and discussions are ongoing with three others. Discovery work of size and scale of contracts held by each delivery partner and confirmation of contracts suitable for bundling will commence this month. This work will be led by the assigned lead agency with support from SIA and MSD. Support arrangements include the Treasury and Ministry of Business, Innovation and Employment (MBIE) so barriers encountered with procurement or funding models are raised early and solutions found. SIA and MSD continue development of collateral to support lead agencies. Implementation of scale-up 9(2)(f)(iv) [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]
Contact	Alistair Mason, 9(2)(a) [REDACTED] Deputy Chief Executive, Investment and Delivery

Social Investment Board meeting**Status****Board meeting on 9 December****Description**

The Social Investment Board met on 9 December 2024. The meeting was focused in the morning on the roadmap for Social Investment, with the Chief Executive presenting his thoughts on the way forward for discussion with the Board. The afternoon was focused on deep dives on Social Investment Outcomes Contracting, 9(2)(f)(iv), the Social Investment Fund, and the data infrastructure needed for Social Investment. The next Board meeting is scheduled for the end of January 2025 and is to be held in Auckland.

Contact

Craig Sengelow, 9(2)(a)
Principal Advisor, Governance

Status**Data infrastructure to support social investment****Description**

Stats NZ and SIA are working together closely on immediate improvements to the integrated data system and a plan for future investment. 9(2)(f)(iv)

Beyond these immediate improvements, SIA and Stats NZ are working on a business case setting out options for ongoing investment in data infrastructure to support social investment. 9(2)(f)(iv)

Contact

Craig Jones, 9(2)(a)
Chief Advisor

Upcoming Papers

Briefings and reports

Title	Description	Due date
9(2)(f)(iv)		
Briefing: International approaches to social impact investment (including Finland)	This briefing will provide information on international approaches to social impact investment.	18 December 2024
Briefing: Social investment and the Victorian Early Intervention Investment Framework (EIIF)	This briefing provides an overview of the EIIF, alignment and lessons for social investment implementation in NZ.	18 December 2024

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
Member of the public	The cost breakdown of the welcome for the new Chief Executive and Secretary of Social Investment	17 December 2024
Leader NZ Outdoors and Freedom Party	Research into unvaccinated rates	18 December 2024
Ministerial OIAs		
Member of the public	Numbers of Ministerial/Departmental Items received between 15 May 2024 and 15 November 2024, by the Minister's office and broken down by timeframes	13 December 2024
Office of Francisco Hernandez	All correspondence and advice sent or received by the Minister or their staff, regarding the Carbon Neutral Government Programme, since 27 November 2023.	13 January 2025
Member of the public	Access to 2024 Cabinet papers on social investment	22 January 2025
Ministerial correspondence		
Hui E	Follow-up to Communities webinar	16 January 2025
Great Potentials Foundation	Reply to letter on social investment	16 January 2025
Wellbeing Economy Alliance	Reply to letter on Wellbeing of Generations Act	16 January 2025

Cabinet Papers we have been consulted on

Topic	Comment
SIA has not provided comment through agency consultation on any draft Cabinet papers this week.	

Upcoming engagement and communications

Opportunity	Description	Date
9(2)(g)(i)		



Weekly Report – Week ending 20 December 2024

Date: 18 December 2024

Security level: Budget Sensitive

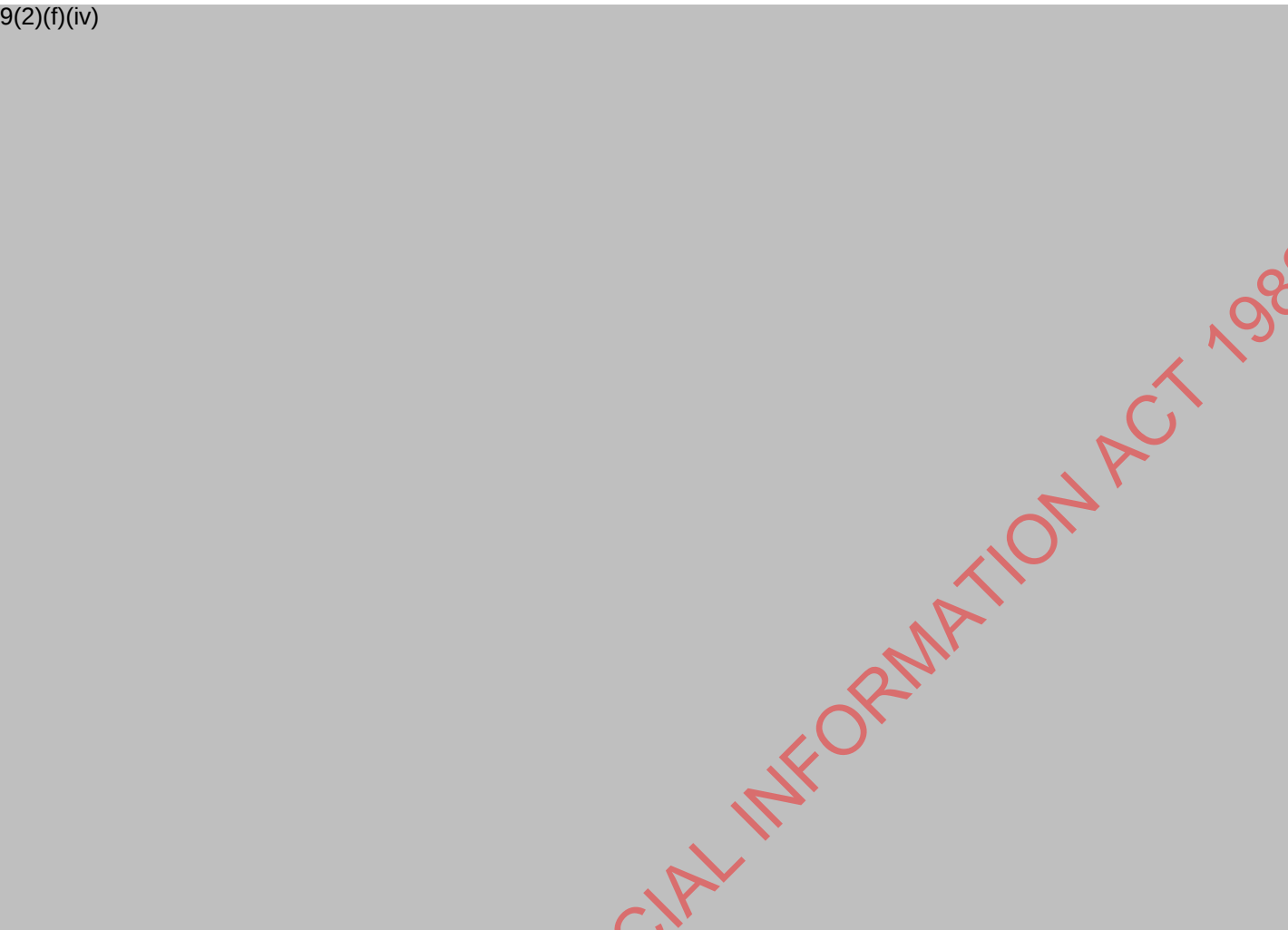
To: Hon Nicola Willis, Minister for Social Investment

Tracking Number SIA 24/25 - 144

Purpose

This weekly report provides you delivery updates for the Social Investment portfolio for the week ending 20 December 2024.

9(2)(f)(iv)



Other items

Infrastructure to support social investment

Status	Work progressing on test-and-learn projects to test data flows required for social investment contracts
Description	We are working with Stats NZ and a small number of providers to test the data flows required for managing outcomes contracts, including data required for impact measurement. The intention is to use the Integrated Data Infrastructure for this purpose and the SIA Data and Analytics Platform for reporting purposes. These 'test-and-learn' projects will begin early in the new year. In parallel, we are liaising with the Office of the Privacy Commissioner, Crown Law and the Stats NZ-led Data Ethics Advisory Group to make sure privacy and ethical practice are designed into this process from the outset.
Contact	Craig Jones, 9(2)(a) Chief Advisor

Upcoming Papers

Briefings and reports

Title	Description	Due date
9(2)(g)(i)		

OIA and Ministerial correspondence requests

Requester	Topic	Due date to requestor
Departmental OIAs		
<i>None in progress</i>		
Ministerial OIAs		
Member of the public	Access to 2024 Cabinet papers on social investment	22 January 2025
Media organisation	Copies of all substantive policy advice about social investment or social bonds since 1 August 2024	24 January 2025
Ministerial correspondence		
Hui E	Follow-up to Communities webinar	16 January 2025
Letter to Hon Chhour	Follow up letter	16 January 2025

Cabinet Papers we have been consulted on

Topic	Comment
<i>None</i>	

Upcoming engagement and communications

Opportunity	Description	Date
9(2)(g)(i)		
Philanthropy NZ Govt Forum	You have been invited to speak at the Philanthropy-NZ Govt Forum in February, further advice is being developed for your office as you have also been invited to speak to Philanthropy NZ outside of the Forum that morning	28 February 2025
9(2)(f)(iv)		