Whānau Ora

Action Research: Pipiri / June 2013

Whānau potential is high and ready to be unleashed; Whānau Ora provider networks are extensive, committed, innovative and ready to learn from each other; and Whānau Ora is already anchored on solid foundations that will bring fresh opportunities and gains for whānau in the decade ahead. (Professor Sir Mason Durie – Chair, Whānau Ora Governance Group)

Whānau Ora action research is providing tangible evidence of transformation following whānau planning and engagement.

Action research – as part of the wider measurement activity for the Whānau Ora approach – is focused on providing evidence of provider practice, developing improved whānau-centred service delivery and the impact on whānau. The key research question is *'how could agencies and providers most usefully contribute to best outcomes for whānau?'*

The action research process requires researchers to work with Whānau Ora provider collectives to instil the notion of building 'learning organisations'. The purpose and intent is to create a 'change' methodology within organisations. Therefore, a substantive amount of information in the initial stages of the action research implementation is focused on the provider collective shift towards transformation and collaboration.

Action research reports are analysed for evidence of a 'shift' or a 'change' for provider collectives in implementing the Whānau Ora approach. Initial benchmarking information currently gathered about whānau is to develop a baseline to demonstrate change or improvement they experience from a Whānau Ora service delivery approach.

Summary of key findings

- **KEY FINDING 1: A growing confidence in a collective approach**

Despite the challenges, single provider organisations are working together. Governance entities and guidelines are being developed and change management functions are in place to focus on establishing new and shared systems. Providers are seeing the strengths of working collectively to develop common referral and assessment systems for consistency, have confidence in referring whānau to other services in the collective and are collaborating to work more strategically in mutually beneficial ways.

A perception that some providers have been 'forced together' as collectives is demonstrated through suggestions that trust is often tested at a governance level. This quote from a key informant in a focus group of provider staff offers further insight into the trust aspect and the time needed to build relationships across the collective:

> *We were kind of pushed together. We've had to have time to absorb that we are focused on building relationships, of establishing trust first, before trying to do anything else ... that takes time.* (Provider)

Conversely, a further comment on trust through the building of relationships as a collective demonstrates an emerging confidence in working as a collective:

They weren't as open as I thought but after I got to know them, I think trust has grown. You know, there's more honesty and transparency – you don't have to worry about them cutting your throat to get anything because you've all got the same thing in mind. (Provider)

The balance between operating as a single provider – business as usual – and keeping pace with development as a collective is an ongoing challenge. The recruitment of new staff and the development of new service delivery models and shared systems have been difficult to develop alongside the demands of operating single provider organisations. Protocols have been developed, articulating where a collective approach would be more effective and where maintaining a single provider approach is appropriate.

Some collectives have established a change management function where external advice is engaged to focus on the 'nuts and bolts' of transformation to a collective entity. This approach seems more evident in the larger provider collectives than for the smaller ones where there are fewer providers and services to integrate.

The research indicates that despite the challenges that are presented in developing a collective approach, emerging evidence suggests that working as a collective is 'breaking down some of the barriers experienced by providers'.

- **KEY FINDING 2: Navigation drives organisational change**

Navigational approach

Although navigator-type roles or approaches existed prior to a Whānau Ora approach – for example, key whānau worker – Whānau Ora demands a shift in practice for staff to think 'longer term with whānau' as well as broader across a range of sectors in addressing needs.

Navigators are more likely than other staff to work with whānau who present with complex and multiple issues and are often in crisis. There is a tension, however, that navigators run the risk of being over-burdened with too many referrals from other agencies because those agencies do not have the capability to deal appropriately with whānau. Some referrals have required a 'basic' level of support which should have already been provided by the referring agency.

On the other hand, a critical aspect of navigation is supporting whānau to plan and establish a pathway to achieve aspirational goals. One collective has explored the use of navigators *within whānau* which they term as 'whānau champions'. A whānau champion seems to be effective in motivating and supporting whānau to set goals. The following case study example further demonstrates how this has occurred:

> *One whānau champion identified education as a vehicle to transformation for his whānau. He moved ... to a place of empowerment and transformation. His enrolment at a local polytechnic led to other whānau enrolling also ...* (Navigator)

In tandem with this development is an exploration of whānau leadership to identify qualities required to encourage and inspire whānau. Whānau have acknowledged that whānau leadership is 'contextual', suggesting that more than one leader is required across various situations and environments; for example, in the home or on the marae. Exploration is continuing and reflection with the provider collectives should indicate how this knowledge will inform provider collective transformation and effect change for whānau.

Navigator attributes

The importance of getting the right person for the navigator role is stressed. Key components of a successful navigator are identified as having strong relationship management skills and whakapapa connections as well as local knowledge of the community and available services. The following comment further illustrates the attributes required for the role:

> *She's everybody's aunty, in a really good way. The results that we've had with some really difficult people have been because of the type of personality that she has … her empathetic style and immediate acceptance by clients of her and the ability for whānau to feel relaxed and respected, means she is able to make progress with whānau who are struggling with social issues as well as the immediate health concern with which they present.* (Provider)

The same provider collective has identified navigation as an 'opportunistic intervention' – although a client may present with a health issue, wider issues emerge in discussions facilitated by the navigator. This is attributed to the way in which whānau are engaged by the navigator.

The terms 'navigator' and 'navigation' are not universally used across all provider collectives and are more widely observed in Te Puni Kōkiri reporting requirements. Māori terms have been used in some cases to describe navigator roles as these seemed to fit better with Māori cultural philosophies and practices.

Regardless of the terminology and the varied application from coordination to more focused engagement, the navigator role appears to be the key 'driver of change' across provider collectives, sectors and regions. A broad picture of a navigational role is emerging as:

- supporting whānau through crises and matching needs with appropriate services
- assisting whānau to develop a plan with realistic and aspirational goals
- brokering services and negotiating with organisations and agencies to ensure the most appropriate response to meet broader whānau needs
- reinforcing the need for organisations to work together on addressing whānau needs in an inter-sectoral way rather than separately responding to each issue in isolation – working towards a holistic approach
- helping whānau to develop a step-by-step approach to achieving their goals
- working towards developing a level of support for the required amount of time that allows whānau to take ownership of their responsibilities to achieve.

KEY FINDING 3: A developing workforce combining inherent skills with professional practice

Workforce development – cultural competency training

There is acknowledgement that change requires critical reflection on current practice; for example, reviewing how whānau are engaged as opposed to practices geared towards engagement with individuals. Traditional models of engagement continue to be utilised with more specification about how and where they are applied across the organisation and how they are making a difference.

The process of whakawhanaungatanga (relationships) was noted as fundamental for engaging whānau to build trust. The ability to apply the values and practices of awhi (support) within a professional context was identified as a key aspect of the engagement process. There was credit given to the Whānau Ora approach for prompting the need for a 'significant change in how to enquire, listen and support whānau' without being judgemental or making assumptions.

Some provider collectives are reviewing – through training – their cultural competencies and how they are applied in all areas across the organisation, not just in advocacy or brokerage roles. Training is provided as a mechanism to review cultural competencies, their application by staff and their alignment to organisational values and principles of engagement.

Outcomes-focused workforce

The importance of encouraging staff to focus on outcomes has brought about the demand for training in the Results Based Accountability (RBA) model. This model prompts reporting on measures of population and performance. The approach asks users to reflect on what they are doing, how well they are doing it and whether anyone is better off as a result. The uptake of RBA training funded by Te Puni Kōkiri is increasing across provider collectives as well as the Whānau Ora Regional Leadership Groups.

Training staff to become facilitators of planning with whānau and to improve their ability to engage with whānau is occurring across provider collectives. A number of models are being used to train staff in whānau planning.

Preparing the workforce to be proficient in applying whānau-centred practice is an ongoing challenge for provider collectives. Current training approaches are also seen as opportunities for staff to review their practice – specifically application of skills and competencies.

Developing the appropriate workforce also requires valuing the unique skills and intelligence amongst staff and ensuring the sustainability of 'self-care', particularly for those who work with whānau with complex needs.

- **KEY FINDING 4: Resourcing and capacity needs to match whānau-centred service delivery**

Contracting environment

A recurring theme in the research is that provider collectives are working in a competitive contracting environment. The provider collectives also refer to the difficulty of multi-reporting requirements often seen as 'duplication of information' and stress the need for single reporting across sectors.

The simultaneous roll out of other government initiatives places considerable burden on providers to report separately on related initiatives. This adds to the complexity of reporting on activity attributed to Whānau Ora because of the similar nature of the initiatives and what other agencies are seeking from them.

It was noted that government contracting processes are slow and impact on the timeliness of implementation and reporting. Also noted was the mismatch of contract deliverables with what staff are actually doing to respond to whānau needs. Examples of staff 'working beyond the contract' and 'being there 24-seven' are repeated in the action research reports.

Despite the constraints of the contract, staff responded to whānau because of the inherent responsibility they felt. This could be seen as 'placing whānau at the centre' and an indication of the level of disempowerment amongst whānau. The consequence of this, however, is that if crucial activity is not reported on through contract deliverables, the Government will not fully understand the extent to which providers respond to whānau or the resources required.

On another level, provider collectives in their review of practice will need to ensure that staff capacity and capability is appropriately used when responding to whānau, particularly in managing complex issues. This point also relates to referring whānau to the most appropriate service when needed.

- **KEY FINDING 5: Whānau planning is a 'change' tool for whānau**

Whānau planning

The aim of whānau planning is centred on supporting whānau to develop a plan that sets out aspirational goals beyond their immediate needs. The plan is seen as a 'starting point' for some who are interested in a broader view to address issues and achieve goals. Plans are also seen as useful 'change' tools for whānau containing actions as a pathway for achieving goals.

Common goals identified in plans included:

- financial planning and stability
- connections to whānau and mokopuna (grandchildren)
- building on cultural knowledge
- healthy lifestyles
- greater confidence in developing effective parenting
- engaging in community life
- coping with grief and loss.

Staff noted that 'whānau ownership of the plan is critical' and that the role of the provider is to support the development of goals and to work with the whānau to provide direction towards achieving them. Critical to the support role by staff is working with whānau towards 'self-sustainability' and not about completing actions on behalf of the whānau. It was also noted that all whānau members should be involved in the planning process.

It was acknowledged by staff that whānau need to be in the right frame of mind and in the right place to engage in planning. Those whānau who present with an immediate need will not be focused on planning until that need has been addressed. It is only then that whānau will consider planning for broader purposes.

Whānau experiences

Whānau experiences of planning indicate that they are able to determine when to exit from programmes as goals and milestones are achieved. Whānau spoke of restored confidence and hope in being able to achieve set goals. This was also seen by some as motivation to act for themselves.

Whānau saw planning as establishing a sense of control and priority in their lives. One comment, albeit from a provider, illustrated the impact of planning on whānau:

> *Having a plan is like an intervention in itself.* (Provider)

It was noted by whānau that the attributes of staff were central to engaging and building positive relationships with them. Whānau spoke of the 'passion and commitment' to ensuring that their engagement in planning was a positive and inspirational experience.

- **KEY FINDING 6: Collaboration to effect change for whānau**

There is a 'level of confidence' forming in the governance entities to provide strategic support to activity 'on the ground', looking more broadly for opportunities to work together on contracts and to address regional issues. Rallying as a collective to support a single provider at risk of losing a significant contract demonstrated one value aspect of adopting a collective approach.

The combining of resources and knowledge across the collective to influence the funder resulted in the contract remaining with the provider and a specific need in the community continued to be addressed. Although this is a positive result, it is noted that time and commitment in addressing contractual issues with the funder and developing an appropriate legal entity was significant in this case.

The move by provider collectives to collaborate on contracts and regional priorities increasingly places them in a strong position to connect into government priorities and initiatives to improve service delivery; for example, Better, Sooner, More Convenient, Investing in Services for Outcomes and the ensuing work on integrating multi-agency contracts.[1]

Emerging Pacific response

Although it is still too early to identify a uniquely Pacific response to Whānau Ora regarding a change or shift, progress reports from the action research implementation stage suggest a 'determined' process is occurring. At the Pacific provider collective level, similar activity to that of Māori provider collectives is taking place; for example, developing governance entities and exploring a collective approach.

Through fono and focus groups, Pacific provider collectives have sought feedback from Pacific families on their priorities and needs regarding wellbeing. A summary of these priorities includes:

- strengthening spiritual relationships
- maintaining cultural values in their daily lives in New Zealand
- building and strengthening relationships with each other
- safety in the home
- access to employment and education opportunities.

Although the priorities for Pacific families and Māori whānau are similar, Pacific provider collectives have noted a number of key challenges that are unique to working with Pacific families. Of particular note are:

- shift work, childcare and travel costs impact on the participation of Pacific families in community initiatives – described as 'unforeseen dynamics' by one provider collective
- shared understanding and clarity of roles, specifically within families and provider collectives
- men working with women and young women with older men – establishing appropriate protocols and boundaries
- acknowledging Pacific models of communication including technology
- differences in translation; for example, formal and informal
- accommodating for a range of Pacific languages and cultures.

Benefits of Action Research

There is a developing awareness amongst provider collectives of the benefits of using action research to inform development. These learnings are summarised here as:

- understanding how action research can inform quality management and continuous improvement systems
- reflection to review actions is an iterative and ongoing process

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[1] Led by the Ministry of Business Innovation and Employment

- data enables practice – understanding organisational behaviour and practice and whānau response from data collection and analysis, identifying what needs to change, and adjusting and making improvements to performance
- being open to trial and error
- continually up-skilling and developing knowledge.

Whānau Ora investment

There is growing recognition and application of working collectively and collaboratively to contribute to best outcomes for whānau. Although timeframes are constrained and complexities have arisen regarding relationships and differing perspectives, there is an emerging shift towards working collectively.

Whānau Ora provider collectives are well placed to deliver whānau-centred services. They have a strong commitment to and empathy with their whānau and wider communities. They are examining models and approaches for their effectiveness in contributing to improved outcomes for whānau and are developing more collaborative ways to contribute to improved outcomes for whānau.

Emerging themes of the realities of working with whānau and the inherent skills required, are identifying resource and capacity issues requiring more strategic discussion across sector agencies and provider collectives. These issues relate to matching relevant contract deliverables with skills and providing appropriate workforce development training.

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