

tātou COLLECTIVE

us, together.

ANNUAL REPORT 2026 - 1 JULY 2025 to 30 JUNE 2026

TĀTOU MEANS "US, TOGETHER"

a name that reflects our belief in collective responsibility and the power of intergenerational wellbeing.

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TABLE OF CONTENTS

02

Performance Snapshot

He Mihi 03

Chairman's Report 04

Chairman's Acknowledgements 05

Establishment Chief Executive's Report 06

08

Introduction

Year One Against the Five Key Shifts 10

About Tātou Collective 12

14

Our Board

Whānau Ora Investment Board 16

About Whānau Ora 18

Year One Performance Summary 20

Establishment and Year One Delivery 22

24

Strategic Planning

Service Delivery and Network Performance 32

38

Whānau Progression

Other Whānau Initiatives 40

Targeted Support Services and Community Based Capability Building Funding Pathways 41

50

Probity, Assurance and Accountability

Financial Summary 52

Future Directions 54

PERFORMANCE SNAPSHOT

1 July 2025 to 30 June 2026

4,000 (approx)
whānau connected with our Delivery Partners

2,767
whānau enrolled in Navigator support as of 30 June 2026

2,322
upward movements in whānau wellbeing

540
movements of more than one stage on the Progression Framework

In our first year of commissioning Whānau Ora services, approximately 4,000 whānau connected with our Delivery Partners. As of 30 June 2026, 2,767 were receiving ongoing Navigator support. Across the year, we recorded 2,322 upward movements in whānau wellbeing, including 540 movements of more than one stage on the Progression Framework. We also recorded 210 downward movements, reflecting that whānau progress is not always linear.

At year end, approximately 2,800 people remained in the intake and allocation pipeline, indicating substantial unmet demand. Overall, these results exceeded our projected modelling and demonstrate a strong first year across the Tātou Collective network.

Year One achievements

By the end of Year One, Tātou Collective had:

- maintained a national Pacific Navigator workforce of 128 FTE
- established a national reporting system and signed a Data Sharing Agreement with Stats NZ
- established a Whānau Ora Investment Board to bring investment decisions closer to communities
- completed three strategic documents that now form part of our Outcome Agreement (Regional Needs Analysis, Investment Plan, Navigator Profile)
- delivered a workforce development programme and translated core practice tools into eight Pacific languages
- contracted with 48 delivery partners for Navigator Services and a further 33 organisations to provide targeted support and community-based capability building

HE MIHI

Tuia ki te rangi, tuia ki te whenua, tuia ki te moana, tuia ki te here tāngata.
Ka rongo te pō, ka rongo te ao.

Ka mihi ki te Atua, te puna o te ora, mō ngā manaakitanga ki a tātou katoa

E ngā mate, okioki atu rā. E te māreikura, e Kahurangi Tariana Turia, ka kawea tonutia e mātou tō wawata mō Whānau Ora. Tīhei mauri ora

E ngā iwi, e ngā hapū, e ngā mana whenua o ngā tōpito o te motu, mai i Te Hiku o te Ika ki Te Waipounamu, ki Rakiura, tēnā koutou katoa.

E ngā uri o te Moana-nui-a-Kiwa: Sāmoa, Tonga, ngā Kuki Airani, Niue, Tuvalu, Tokelau, Fiji, Kiribati, ka mihi ki ō koutou reo me ō koutou tikanga.

E te Minita mō Whānau Ora, e te rangatira e Tama Potaka, e Te Puni Kōkiri, ka mihi ki tā koutou ārahitanga, kia ū ki te oranga o ngā whānau

E Rangitāmiro, e Māhutonga, e Te Tauraki,
mā tātou tahi e hāpai te kaupapa o Whānau Ora.

E ngā kaiwhakarato, e ngā kaiārahi, ngā ringa raupā o Whānau Ora,
tēnā koutou mō tō koutou manawanui.

E ngā whānau, kei a koutou te mana, kei ō koutou ringa ngā hoe hei whakatere i ō koutou waka ki te pae o te ora.

Tēnei mātou o Tātou Collective e mihi atu nei ki a koutou katoa.
Mauri ora ki a tātou.

CHAIRMAN'S REPORT



Pacific peoples are the youngest and fastest-growing population in this country. Yet too many of our families experience poorer health, lower incomes and fewer opportunities than their neighbours. The question before us is how we create lasting change for families now, while changing the trajectory for the generations that follow.

This has not been an easy time for our families, yet there is also opportunity. The policy conversation is moving towards data-driven investment, devolution and services delivered closer to communities. This creates an opening for Whānau Ora, which starts with the aspirations of families, draws on the strengths of communities and places decisions with those who best understand what will make a real difference.

In March 2025, The Cause Collective was given the mandate to establish Tātou Collective (Tātou), the Whānau Ora Commissioning Agency for Region Four, serving Pacific peoples across Aotearoa. We signed an Outcome Agreement with Te Puni Kōkiri in late April 2025, and on 1 July 2025 Whānau Ora Navigator Services went live with 128 funded Navigator full-time equivalent (FTE) positions across the country.

Community commissioning is only as strong as the foundation it is built on. We made a deliberate decision to prioritise frontline services and get the basics right before moving to scale: robust data and reporting systems, a clear understanding of our network's capability, and consistent, quality Navigator practice.

Under the Whānau Ora reset, the performance of the whole network matters. When one organisation becomes stronger, the network benefits. When one-part struggles, it affects our collective result. We are accountable to one another, as well as for our individual contracts. We will not always agree, but we must remain united in protecting the integrity of Whānau Ora and improving outcomes for our most vulnerable families.

Tātou is still a start-up and we will make mistakes. We are working towards generational change, not a quick fix, and there is no blueprint. Our success will be measured by whether we learn, improve and stay focused on the families we serve and the generations who follow.

We enter our second year clear about the responsibility we carry: to honour the trust placed in us, strengthen the network around our families, and turn this year's foundations into measurable and lasting change.



Leopino Foliaki
Chairman, Tātou Collective

CHAIRMAN'S ACKNOWLEDGEMENTS

We acknowledge the Minister for Whānau Ora, Hon Tama Potaka, for his leadership of the reset and his confidence in Tātou Collective to establish a Pacific-led commissioning model at national scale.

To Te Puni Kōkiri, thank you for your support throughout our establishment. We acknowledge former Secretary for Māori Development, Dave Samuels, whose stewardship of the reset helped create the conditions for agencies such as ours, and we welcome the incoming Secretary, Mr Dion Tuuta.

To the members of the Tātou Collective Board, Deputy Chairman Dr Uluomato'otua Saulaulu Aiono, Associate Professor Yvonne Crichton-Hill, Dr Julie Wharewera-Mika and Mr Alex Fala, thank you for your stewardship and commitment.

To the Whānau Ora Investment Board, Deputy Chair Tofilau Nina Kirifi-Alai, Professor Tracie Mafile'o, Pulotu Tupe Solomon-Tanoa'i, Fila Fuamatu, Tua'ipulotu William Cuthers and Pauline-Jean Luyten, thank you for your wisdom, challenge and focus on directing investment where it can make the greatest impact.

To our Delivery Partners, including those who joined through Targeted Support Services and Community-Based Capability Building, thank you for trusting a new agency. To our Navigators and Community Navigators, your daily service sits at the heart of everything reported here.

To our fellow Whānau Ora commissioning agencies, Rangitāmiro, Māhutonga and Te Tauraki, thank you for your partnership. While each agency serves distinct communities, we share a collective responsibility to strengthen Whānau Ora across Aotearoa.

To the Ministry for Pacific Peoples, New Zealand Police, the Ministry of Social Development, Kāinga Ora and Stats NZ, thank you for your collaboration and for sharing your knowledge with our workforce.

To the University of Otago, thank you for your collaboration. Together, we have begun work that will strengthen the evidence for Pacific-led commissioning.

To the team at The Cause Collective, thank you for the infrastructure, systems, strategic advice and operational support behind the scenes. Our establishment year would have been much harder without you.

To our Establishment Chief Executive, Leasiosiofa'asisina Rachel Enosa, and the establishment team, thank you for carrying an extraordinary responsibility with focus and discipline, building a new agency and national network at pace on solid foundations.

Above all, we acknowledge the whānau who entrusted us with their aspirations, challenges, safety and futures. This report belongs to them as much as to us.

CHIEF EXECUTIVE'S REPORT



More than ten years ago, those of us involved in establishing The Cause Collective (TCC), including our Tātou Chairman, Leopino Foliaki and Deputy Chairman Dr Uluomato'otua Saulaulu Aiono, submitted a proposal to become the Whānau Ora Commissioning Agency for Pacific peoples and underserved communities across Aotearoa New Zealand. We were unsuccessful, but we were not deterred.

The aspiration we held then is the same one we carry today: to bring funding decisions and service design closer to families and communities, strengthen frontline organisations and to work alongside whānau as partners in creating meaningful change.

It is therefore a privilege to present the first Annual Report of Tātou Collective, covering our establishment year from 1 July 2025 to 30 June 2026.

Laying the foundations

Our first responsibility was to establish a national Pacific commissioning agency and ensure that services were available from day one. We began with 128 funded Navigator FTE across 48 Delivery Partners, giving Tātou a national frontline presence from the outset. Our Navigators and Community Navigators continued supporting families while adapting to a new commissioning model, new practice expectations and a national data and reporting system. They serve with humility, commitment and care, often supporting families through the most difficult times in their lives.

Their willingness to learn and adapt, while remaining focused on whānau, has been central to what we achieved this year.

Following the submission of our Investment Strategy in March 2026, we established funding relationships with a further 33 organisations through Community-Based Capability Building and Targeted Support Services. These partnerships extended our reach into communities that Navigator Services alone could not reach, including Manawatū and South Canterbury.

Whānau Ora cannot be available only where strong services already exist. It must reach the places where Pacific families live, including smaller towns and growing communities where support is harder to find. Our network brings together organisations with different levels of experience, infrastructure and capability. Strengthening that network is not separate from our role as a commissioning agency; it is central to it.

What we have built is more than the infrastructure of a commissioning agency. We have created the foundations for Pacific and underserved communities to have a stronger voice in where investment goes, how support is delivered and how success is understood.

This first year required us to build systems while services were already operating, develop national relationships while responding to local needs, and introduce greater consistency without losing the

cultural knowledge and community connections that make Pacific organisations effective. That balance has not always been easy, but it is essential.

Building the evidence

During the year, we also began developing the evidence base for a community commissioning model. Our six-month foundation project with the University of Otago independently assessed the quality of our data, considered how the Whānau Ora Outcomes Framework could better reflect what matters to Pacific whānau, and established guidance for a long-term research partnership. I regard this as one of our most important achievements. Good evidence must do more than report activity after it has happened. It should help us understand where the need is greatest, where support is making a difference, and where we need to change our approach. Over time, it should also give government and communities greater confidence in the value of Whānau Ora.

Where we are heading

Tātou Collective represents a new approach to community commissioning. This is emergent practice, we are learning, testing and adapting as the evidence develops.

Our second year will focus on depth, quality of practice and deepening our evidence base. We will strengthen organisations where capability gaps remain, improve reporting and safety planning, embed our new funding relationships, and turn our first year of data into clear evidence of what is changing for families.

We must also continue extending our reach. The promise of Whānau Ora will not be fulfilled if support remains available to only a small proportion of the families who could benefit from it.

We look forward with hope and determination to what becomes possible when our families and communities receive the right support at the right time, with opportunities to lead the change they want for themselves.



Leasiosiofa'asisina Rachel Enosa
Establishment Chief Executive, Tātou Collective

INTRODUCTION

This is the first Annual Report of Tātou Collective Limited. It reports on the year ended 30 June 2026, being the establishment year of Tātou Collective as the Whānau Ora Commissioning Agency for Region 4.

Tātou Collective is a commissioning agency and does not deliver frontline services itself. Its function is to steward public funds appropriated for Whānau Ora, allocate them against assessed need, contract Delivery Partners, monitor performance and account for results. This report is the primary public account of how that function was discharged in Year One.

Activity in Year One was directed to establishing the Navigator network, completing the strategic planning documents required under Schedule 1 of our Outcome Agreement, establishing the Whānau Ora Investment Board and commencing investment through the Other Whānau Initiatives pathways. Accordingly, this report evidences service reach, practice quality and early whānau progression.

Accountability framework

Tātou Collective is accountable to the Minister for Whānau Ora, through Te Puni Kōkiri, under an Outcome Agreement for the 2025 to 2028 triennial period within a twelve-year horizon. The annual commissioning envelope is $28.34 million. Accountability is discharged through:

- Four monthly Service Performance Reporting.
- Strategic planning documents.
- Progression Framework data.
- De-identified data provided to Stats NZ under a data sharing agreement for linkage into the Integrated Data Infrastructure.
- Annual reporting and audited financial statements under the Companies Act 1993 and the Charities Act 2005.

Probity and assurance

All Year One procurement was subject to independent probity assurance by Grant Thornton New Zealand Limited, covering the Whānau Ora Navigator Services Request for Tender and the concurrent Targeted Support Services and Community-Based Capability Building Request for Proposal processes. Grant Thornton reviewed procurement planning, tender documentation, evaluation criteria and conflict of interest processes, observed evaluation moderation, and confirmed to the Board that the processes were conducted in accordance with probity best practice and New Zealand government procurement rules. No probity concerns were identified.

Evaluation and decision-making are separated. Applications were assessed by independent evaluation panels against published criteria and moderated for consistency. Allocations were approved by the Tātou Collective Board and reviewed by the Whānau Ora Investment Board. Each allocation is supported by a documented evidence trail linking the assessment score, moderation outcome and any treatment decision to the procurement and purchasing framework.

Conflicts of interest are recorded in a register maintained by Tātou Collective and provided to Te Puni Kōkiri with each Service Performance Report. Delivery Partners are required to notify Tātou Collective of any actual, perceived or potential conflict.

Basis of preparation

Information in this report is drawn from the three Service Performance Reports provided to Te Puni Kōkiri for the 2025/26 year, including the full-year Progression Data Summary; the strategic planning documents; reporting under the Whānau Ora Sector Capability Uplift Fund; the independent probity assurance statement and Investment Board and Board approved procurement and purchasing documentation which confirm final funding allocations. Financial information is drawn from our annual audited accounts.



YEAR ONE AGAINST THE FIVE KEY SHIFTS

The five key shifts underpin the Whānau Ora reset and are restated in the Minister's 2026/27 Letter of Expectations. The table sets out Tātou Collective's Year One position against each shift.

Shift	What is expected	Year One position
1. Greater service reach	**Increased funding to frontline delivery, and greater spread, reach and number of Navigator services.**	• 128 FTE Navigators employed across 48 Delivery Partners • Whānau Ora engagement across 31 territorial authorities • 81 organisations funded across all pathways.
2. Strengthened evidence base	**De-identified Whānau Ora data linked to the Stats NZ Integrated Data Infrastructure (IDI).**	• Single national reporting system live from 1 July 2025 • Data sharing agreement with Stats NZ in place • Navigator-collected data linked into the IDI
3. Data-driven investment planning	**Evidence based decision making with Investment Boards providing localised, representative input into investment decisions.**	• Investment Board appointed through an open process and inducted • Regional Needs Analysis Report • Investment Strategy • Navigator Profile • $5.8 million allocated through independently assured procurement
4. Workforce development and retention	**Regional workforce development plans so that Navigators can meet community need**	• Workforce Development Plan in place • Three Foundation Programme rounds • Two National Workforce Fono • Regional Communities of Practice • $436,000 in targeted provider capability investment delivered
5. Strengthened risk management	**Enhanced data accuracy, traceability and reporting to identify risk to vulnerable whānau early**	• Complexity Classification Framework in use • Risk Plan completion at 90.1 percent • Vulnerable whānau identified rose from 309 to 620 • Nil statutory escalations


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LOWNER

ABOUT TĀTOU COLLECTIVE

The Tātou Collective (Tātou) is an independent, Pacific commissioning agency established to transform how services are designed and delivered for families across Aotearoa.

We are shifting resources and decision-making closer to communities, ensuring services are culturally grounded, data-informed and led by the aspirations of whānau themselves. Our approach moves away from traditional funding models by placing the family at the centre, backed by real-time data and whānau voice.

Our focus is on getting support to those with the greatest need, guided by transparency, integrity and the best evidence available.

OUR COMMISSIONING PRINCIPLES

Our approach to Commissioning is guided by five core principles:

- **Transformation:** We drive explicit, sustained change — with whānau in the lead.
- **Access:** We prioritise increasing reach and removing barriers to services.
- **Trust:** We nurture high-trust relationships with whānau, providers and government.
- **Outcomes Focus:** We focus on progressive, intergenerational outcomes — not quick fixes.
- **Unified Approach:** We work collaboratively, aligning across sectors to deliver shared impact.

OUR VISION

This generation will win the next generation.

OUR PURPOSE

Our purpose is to deliver:

Whānau and Community Led Solutions

We place families at the centre, amplifying their voice in the design, delivery and evaluation of services.

Trusted Commissioning

We commission with integrity, guided by transparency, robust procurement and strong accountability for outcomes.

Workforce Support

Our Navigators are supported to walk alongside families, building trust and responding to what matters most to them.

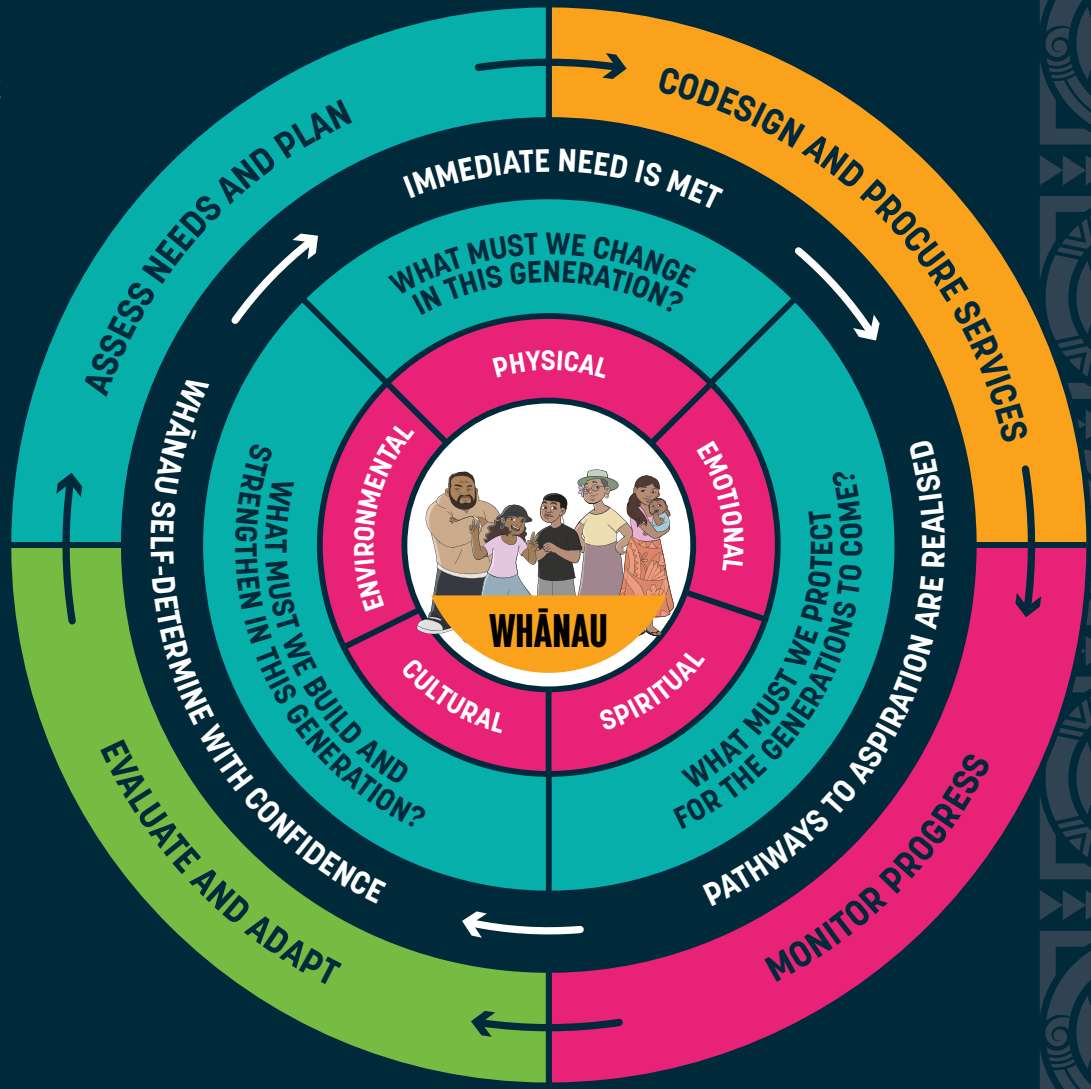
Invest in What Works

We use data, evidence and insights to support culturally grounded, high-impact services.

OUR MODEL

Tātou follows a four-phase commissioning cycle, integrating community voice, cultural frameworks, granular data, and intergenerational thinking, to deliver high-impact, whānau-centred outcomes:

- Assess Needs and Plan
- Co-Design and Procure
- Monitor Progress
- Evaluate and Adapt



OUR BOARD



Mr. Leo Foliaki

Chairperson

Leo Foliaki is an experienced governance leader with a strong background in audit, financial assurance and organisational oversight. He was a Chartered Accountant and Partner at PwC New Zealand for more than 20 years, including leading the Assurance Practice and working across audit, transactions and complex organisational reviews.

During his career at PwC, Leo worked extensively with large public and private sector organisations, supporting financial governance, risk management and major business change. He is a member of the Institute of Directors and holds a number of governance roles.



Dr. Uluomato'otua Saulaulu Aiono ONZM

Deputy Chairperson

Dr Aiono founded successful software technologies company COGITA in 1983. In 2011 he became an Officer of the New Zealand Order of Merit for services to business and in 2022 he was inducted into the New Zealand Business Hall of Fame. In 2025, he received an Honorary Doctor of Commerce from the University of Otago. He is the Habitat for Humanity North South Chairman, Rise Up Academy Chairman, The Cause Collective Chairman and a Tertiary Education Commissioner.



Associate Professor Yvonne Crichton-Hill

Director

Associate Professor Yvonne Crichton-Hill is an Associate Professor of Social Work and Programme Director of the Social Work programme at the University of Canterbury. She works with others to promote and inform Pacific social work knowledge, research and practice in particular focusing on Pacific communities and wellbeing across health, education and welfare fields of practice. Yvonne is passionate about enhancing the potential of Pacific people and working to make Government, policy, and health and social sector activities more responsive to Pacific needs.



Dr. Julie Wharewera-Mika

Director (Ngāti Awa, Ngāi Tūhoe, Te Whānau ā Apanui)

Dr Julie Wharewera-Mika is a senior clinical psychologist, health researcher, and experienced governance leader. She co-leads the Medical Assurance Society Foundation and Aotearoa Brain Project. Julie is the Independent Chair of the South Auckland Social Wellbeing Board, a Mana Mokopuna Commissioner – Children and Young People's Commission, and a founding member of the initial Mental Health and Wellbeing Commission. A passionate and strategic leader, she is guided by strong cultural values and is committed to advocating to support whānau wellbeing for generations to come, prioritising community-led, whānau-centred approaches for long-term systems change. Julie and her husband Jerome (Samoan) have four sons of Māori, Samoan, and Dutch whakapapa.



Mr. Alexander Fala

Director

Alex Fala has spent his career leading ambitious Kiwi companies to world-class performance. Beginning his career at McKinsey & Company, he went on to hold senior executive roles at Trade Me and Les Mills International before serving as CEO of both Vend and Syft Technologies.

He is currently the Chief Financial Officer of leading healthcare innovator Tend Health. Alex attended the University of Oxford as the second Rhodes Scholar of Pacific descent. He holds a first-class honours degree from the University of Auckland and was selected as a business leader in the University's inaugural 40 Under 40 list.



THE WHĀNAU ORA INVESTMENT BOARD

The Whānau Ora Investment Board is the mechanism through which investment decisions are made closer to the communities being invested in.

We sought Expressions of Interest publicly in August 2025 and received 24 applications. Twenty were assessed and ten were shortlisted for interview. An evaluation panel including Tātou Collective Board members interviewed the shortlist and recommended six appointments.

The Investment Board was formally inducted on 10 December 2025. Members were selected for the range of expertise the role demands and for geographic spread.



Tofilau Nina Kirifi-Alai QSM



Professor Tracie Mafile'o



Pulotu Tupe Solomon-Tanoa'i



Pauline-Jean Luyten MNZM



Fila Fuamatu



Tua'ipulotu William Cuthers

ABOUT WHĀNAU ORA

Whānau Ora is an approach that starts with the whānau rather than with a service or programme. Instead of sending a family to several agencies for different issues, Whānau Ora places one trusted person alongside them. That person is called a Navigator.

The whānau identifies what matters to them and the future they want to work towards. The Navigator helps them develop a plan and walks alongside them as they put it into action. The Navigator brings the different parts of the system together to provide the right support at the right time.

The Navigator plays a critical role in building trust, particularly where whānau have had difficult or negative experiences with services in the past. Over time, the Navigator helps whānau build the confidence, skills and connections they need to make decisions, overcome barriers and navigate services for themselves. The goal is not to create dependence on the Navigator. It is to strengthen the ability of whānau to lead their own pathway forward.

Whānau may not always know what support is available, but they know what will work and what will not. The role of Whānau Ora commissioning is to move funding and service design decisions closer to whānau. When we listen and act on the knowledge whānau hold, support becomes more relevant, timely and more likely to lead to solutions that work.

Our experience shows that the Whānau Ora approach is particularly valuable for whānau experiencing complex, interconnected challenges, including intergenerational hardship or trauma, where standard service responses have not created lasting change. It works across the boundaries between services and begins with what matters to the whānau, rather than with the problem or programme funded by the system - and trying to get the family to fit within a standard response.

Whānau Ora is a voluntary partnership with families. Whānau do not need to have all the answers, but they must be willing to engage, identify what they want to change and take an active role in achieving it. Without this readiness, Navigator Services may not be the right support at that time.

Tātou Collective as a community commissioner

The way Whānau Ora drives investment and decision making closer to families is through four community commissioning agencies. Tātou Collective is the Whānau Ora commissioning agency for Region 4, Pacific peoples across Aotearoa New Zealand. Tātou Collective is required to steward public investment so that whānau with the greatest need can access services.

The organisations that deliver the services are our Delivery Partners. They are community organisations, churches, youth and sports groups, health, education, training and social care providers. These organisations are already grounded in the communities they serve. Navigators are employed with 48 of the 81 organisations we have contracted with over the past 12 months.

Whānau and communities are not passive recipients of services in our community commissioning approach. They have an active role in deciding what outcomes matter, designing the responses that

will work and contributing to their delivery. Whānau Ora recognises that communities also know when families are struggling. They often stand alongside those who are most vulnerable and share responsibility for families facing hardship. The Whānau Ora approach creates space for shared responsibility for change.

How we measure change

The Whānau Ora Outcomes Framework is a national framework set by Te Puni Kōkiri that defines what a thriving whānau looks like across seven outcome domains. It is the common language all four commissioning agencies report against, with the Progression Framework measuring the journey towards outcomes.

Whānau enrolled in a Navigator Service are supported to assess their wellbeing against indicators relevant to their goals. The Progression Framework contains 14 indicators, including the living environment, financial security, health, relationships and community connection. For each relevant indicator, they identify their position on a four-stage scale: Aspiring, Growing, Strengthening and Thriving. The framework requires reassessment at least every six months, with earlier reviews where appropriate, so movement between stages becomes visible over time. The assessment reflects the whānau's own perspective.

Service performance reporting measures whether we are delivering what we were funded to deliver. Three times a year we report to Te Puni Kōkiri on reach, practice quality, risk, workforce and finances under our Outcome Agreement. Separately, individual service data is supplied to Stats NZ for integration into the Integrated Data Infrastructure (IDI), where it is deidentified and can be analysed alongside government data on health, housing, education and social services.

Year One provides baseline data, with further work to be undertaken. We have a working measurement system in place. It has been populated with data directly from delivery partners. Our data sources, collection processes and research potential were reviewed by the University of Otago through a scoping project. Year Two and Year Three will focus on refining the indicators and developing our capability to support a research and evaluation programme.



YEAR ONE PERFORMANCE SUMMARY

Table 01: The whānau we reached

Measure	Year One result
Unique whānau engaged	4,000(approx)
Whānau engagements recorded	8,704
Eligibility assessments completed	3,118
Whānau active and enrolled as at 30 June 2026	2,767
Whānau assessed as high or very high complexity	620 being (22.4% of the active caseload).
Whānau who exited support	483
Average caseload per Navigator FTE	21.62, against a commissioning assumption of 17 to 18
Whānau in the intake and allocation pipeline at year end	2,800(approx)

Table 02: Navigator Services and the quality established

Practice measure	Oct 2025	Feb 2026	June 2026
Consent completion	81.8%	92.3%	94.1%
Whānau Plan developed	41.9%	82.0%	86.3%
Risk Plan developed	63.6%	86.3%	90.1%
Partners at high or exemplary practice	20%	77%	90%
Partners requiring priority support	10	1	1
Partners below minimum caseload threshold	21 of 49	4 of 48	0 of 48
Escalations to statutory agencies	Nil	Nil	Nil

*Note: That service delivery cannot commence until consent forms are completed and loaded into the system.

Table 03: The progress whānau have made

Measure	Year One result
Wellbeing assessment records captured	14,282 across 31 territorial authorities
Records at the Aspiring stage at onboarding	52.9 percent
Upward stage progressions recorded	2,322, up from 290 at the previous reporting point
Multi-stage progressions	540 (23.3% of all upward movements).
Downward movements	210
Wellbeing indicators reviewed with the University of Otago	~ 680, refined to 112 for consultation



ESTABLISHMENT AND YEAR ONE DELIVERY

This section records establishment milestones, the strategic planning documents that guide investment, the Whānau Ora Investment Board and workforce development.

TIMELINE

1 July 2025 – Whānau Ora Navigator Service commenced with 128 Navigator FTE across 49 Delivery Partners. The single national CRM system went live.

1 to 22 August 2025 – Expressions of Interest sought for the Whānau Ora Investment Board.

24 applications received.

September to October 2025 – Foundation Training Programme 1 delivered across six regional locations, reaching 169 participants from all Delivery Partners.

31 October 2025 – First reporting milestone. 1,122 whānau active in Navigator services.

4–5 December 2025 – National Fono held in Auckland, with cross-agency contributions from the Ministry of Social Development, Kāinga Ora and New Zealand Police.

10 December 2025 – Whānau Ora Investment Board formally inducted following appointment of six members.

December 2025 – One Delivery Partner exited its agreement due to organisational change.

24 February 2026 – First operational leadership workshop, attended by 35 Delivery Partners.

28 February 2026 – Second reporting milestone.



March 2026 – Tātou Collective Investment Strategy approved by the Investment Board and the Governance Board, unlocking Other Whānau Initiatives investment beyond the Flexi-Fund.

March 2026 – Foundation Programme 3 delivered through five regional workshops, reaching 126 participants.

1 May 2026 – Targeted Support Services (TSS) and Community Based Capability Building services (CBCB) were tendered.

11–12 June 2026 – National Fono held in Manukau with 170 attendees from all 48 Delivery Partners. First Chief Executives and Chairs Fono held alongside it.

30 June 2026 – Completion of University of Otago scoping project – measurement and evaluation project.

Third reporting milestone. 2,767 whānau active in Navigator services.

54 CBCB services and 26 TSS commence.

21 August 2026 – Te Puni Kōkiri approved all three strategic planning documents, which now form part of the Outcome Agreement for the 2025 to 2028 triennium.

STRATEGIC PLANNING

The Outcome Agreement required three strategic planning documents. We completed all three in Year One and submitted them for review. On 21 August 2026, Te Puni Kōkiri advised that all three had been approved. They now form part of the Agreement for the 2025 to 2028 triennial period.

Document	Purpose
Regional Needs Analysis	Sets out the evidence base for investment: where Pacific need is located, how deep it is, and the current service coverage.
Investment Plan	Sets out how Tātou Collective allocates Whānau Ora investment across six funding pathways for 2025 to 2028, with implementation milestones and success measures.
Navigator Profile	Sets the required number, mix, deployment, qualifications and domain knowledge of the Navigator workforce.

The investment strategy and funding pathways

Tātou Collective's annual Whānau Ora commissioning envelope is $28.34 million. The Investment Strategy sets out how Whānau Ora funding is allocated across the 2025 to 2028 commissioning period.

The Strategy prioritises investment to Navigator services as per the Whānau Ora reset. It also recognises that Navigator support alone cannot meet the scale of need. Whānau and communities also have a role in providing support early, before problems escalate and enter the system. The Strategy therefore invests at three levels through six funding pathways:

- **Intensive support level:** - Navigator Services for whānau.
- **System support level:** - Addressing barriers to whānau progression.
- **Community support level:** Enabling earlier support and prevention.

Funding is targeted according to need rather than spread evenly. Tātou's Allocation Framework weighs population scale, deprivation, service gaps and readiness to deliver. Priority goes to communities where Pacific population concentration overlaps with NZDep deciles 8 to 10 areas.

Pathway	Purpose	2025/26	At 30 June 2026
Intensive support level: Maintaining strong frontline Navigator capability			
1. Navigator Services	Trusted, sustained support for whānau with complex needs, and the entry point to all other pathways. Supporting frontline capability to respond to whānau needs.	$16.0m	128 FTE across 48 partners all year
2. Whānau Flexi-Fund	Removes small practical barriers so whānau can act on their plans.	$3.2m	$1.71m spent (53.6%)
3. Emergency Whānau Stabilisation Fund	Protects progress when an unexpected event destabilises whānau.	$0.14m	Established, not activated
System support level: Addressing service gaps and bottlenecks where whānau progression stalls			
4. Targeted Support Services	Clears the service gaps and bottlenecks that stall whānau plans.	$3.0m	Fully committed, 26 allocations
Community support level: Strengthening community environments that support whānau capability and prevention			
5. Community Capability Building Fund	Builds community capability to identify need and respond early.	$2.8m	Fully committed, 53 organisations
6. Family Capability Building Fund	Builds capability within extended family and village networks.	Nil	Begins 2026/27 at $0.8m
Operations, evidence building and overheads		**$3.2m**	
Total commissioning envelope		**$28.34m**	

How the pathways fit together

Navigator Services are an entry point for whānau. Navigators work with whānau to build a plan. They use the Flexi-Fund and the Emergency Whānau Stabilisation Fund to remove practical barriers and refer whānau to Targeted Support Services when a progress stalls because of a service gap or long wait time.

The Community Capability Building Fund and the Family Capability Building Fund intervene earlier upstream. They strengthen the community and family networks whānau turn to first, so that fewer whānau reach the point of needing intensive support.

Funding controls

Navigator Services are funded through General Commissioning Activities. Pathways 2 to 6 form the Other Whānau Initiatives programme, a ring-fenced $9.14 million a year. A further $3.2 million funds operations, evidence building and agency overheads. All allocations sit within the envelope agreed with Te Puni Kōkiri.

Regional allocation

The Investment Strategy sets indicative regional shares that follow the intersection of Pacific population size and deprivation, while maintaining coverage wherever Pacific communities experience persistent need.

Table 04: Indicative regional investment allocation

Region	Share of investment	Key considerations from year one data
Auckland South	46-49%	Largest Pacific population, highest deprivation, highest system pressure.
Auckland Central	11-13%	High housing stress and urban demand.
Wellington region	8-10%	Concentrated need in Porirua and the Hutt.
Auckland West	6-8%	Emerging youth and employment pressures.
Waikato	5-6%	Growth area with employment and education needs.
Bay of Plenty	3-4%	Youth development and education focus.
Canterbury	3-4%	Housing and employment pressures.
Northland	2-3%	Youth engagement and education pathways.
Otago and Southland	2% (approx)	Maintaining access and baseline coverage.

Workforce development

Our Navigator workforce reached full establishment on 1 July 2025, with 128 funded FTE delivered through 136 people, comprising 82 Navigator FTE and 46 Community Navigator FTE.

Navigator roles require a tertiary qualification, typically in social work, community development, counselling, health or education. Community Navigator roles are filled based on lived experience, cultural leadership and community connection. This combination of formal qualification and cultural credibility is intended to reach families who are not well served by mainstream services.

Navigator FTE are deployed across the breadth of Region 4, with the largest concentrations in South Auckland, Porirua, the Hutt Valley, Hamilton, Tokoroa, Rotorua and the Bay of Plenty aligned with Pacific population density as identified in our Regional Needs Analysis.

The Foundation Programme

The Tātou Collective Foundation Programme ran throughout the year and was delivered in six regional locations in September and October 2025, reaching 169 participants from all 49 Delivery Partners.

Round two was delivered at our first National Fono in Auckland in December 2025. It included contributions from the Ministry of Social Development, Kāinga Ora and New Zealand Police, and generated 120 practice questions from the workforce.



Round three ran through five regional workshops in March 2026, reaching 126 participants. Participants rated round three between 4.3 and 4.54 out of 5 for satisfaction, and between 87 and 93 percent rated it highly relevant to their role. Evaluation identified consistent capability priorities: CRM and data entry confidence, supervision, risk management, documentation, Navigator workflow, Flexi-Fund processes and case-based learning. The same themes emerged in every region indicating network-wide needs rather than isolated provider issues.

Navigators also described the increasing complexity of supporting whānau and the difficulty of balancing relational, culturally grounded practice against growing documentation and reporting requirements. This has informed Tātou Collective's approach to capability investment which targets systems and workflow rather than more training alone.

Round four convened a National Fono on 11 and 12 June 2026. It brought together 170 participants from all 48 Delivery Partners. Of those attending, 132 were Navigators and 38 were chief executives, board members or service leaders. For the first time, we presented national service performance and progression data. This information was used to inform discussions with Delivery leaders on collective accountability.

Participants consistently identified trusted relationships and strong partnerships with government agencies, community organisations and churches as central to achieving whānau progression. They continued to identify rising complexity, greater administrative demands and a growing expectation that Navigators coordinate support across multiple government and community services, where their role was to act on behalf of whānau, not on behalf of system stakeholders.

Communities of Practice

Regional Communities of Practice provide ongoing peer learning between Foundation Programme rounds. Across the year they matured from facilitated learning sessions into locally led networks, with regions increasingly setting their own learning priorities. Sessions covered housing navigation, counselling and mental health support pathways and Navigator wellbeing, alongside peer-led practice discussions, engagement with local agencies and site visits.

Communities of Practice have also become a source of commissioning intelligence. Feedback from Navigators led directly to the redesign of the Wellington Community of Practice to strengthen provider engagement and local ownership. They surface workforce pressures, service gaps and local system barriers that performance data alone does not show.

A cohort of Navigators also completed the Ngā Vaka o Kāiga Tapu micro-credential, strengthening culturally grounded practice and responses to family violence within Pacific communities.




Thriving, Healthy and Happy Communities



Capability uplift

One of the clearest findings of our first year is that consistent service performance depends on more than Navigator capability. Consistent practice is supported by the organisational conditions Navigators work within: leadership, supervision, workflow design, documentation, digital systems, risk management and quality assurance.

Six months of Provider Performance Index (PPI) data, programme evidence and Practice Lead intelligence pointed the same way. Navigator capability was improving across the network. The variation that remained sat in provider systems rather than in individual practice.

The Whānau Ora Sector Capability Uplift Fund allowed us to act on that finding within the year. Te Puni Kōkiri approved $685,000, excluding GST, under an Other Activities Agreement running from 1 June to 30 September 2026. Tātou Collective designed the fund as a time-bound system and workforce development investment rather than an operating subsidy, across four workstreams.

Table 05: Capability Uplift Fund delivery

Document	Purpose
CRM and Data System Uplift	Work was completed following live workflow testing in June. Delivered functionality includes the Hauora assessment, the risk and safety module, the Whānau Plan, eligibility and consent workflows, referral functionality and case note support. This moved the CRM from a recording environment towards a system that enables practice.
Targeted Provider Capability Uplift	A targeted cohort of 15 priority providers was identified using six months of performance evidence and Practice Lead intelligence. Each received a capability snapshot and developed a provider-led Capability Development Plan which identified the system or process to be strengthened. All identified providers are contracted, funded and implementing their plans through to December 2026.
Language, Accessibility and Practice Tools	The Centre for Pacific Languages translated 12 CRM-related practice documents, comprising 3,581 source words, into eight Pacific languages. Translation, peer review, quality assurance and validation were completed by 31 July 2026, ahead of the original 31 August timeframe.
System Review and Audit Readiness	An integrated Whānau Ora Audit Programme and a suite of operational audit tools were developed to support delivery partners, covering Governance and Leadership, Management, Service Delivery, Continuous Improvement and Health and Safety and Whānau Experience and Outcomes. The programme included standardised audit criteria, evidence requirements, sampling, findings, remedial action and follow-up processes.

SERVICE DELIVERY AND NETWORK PERFORMANCE

Reach

Whānau engagement was strongest in South Auckland, with the highest levels recorded across Ōtara, Papatoetoe, Māngere, Manurewa and surrounding communities. That reflects both the concentration of Pacific populations and sustained demand. Steady engagement was also recorded across Central, East and West Auckland.

Beyond Auckland, Canterbury recorded the second largest concentration of engagement, particularly in Ashburton and Christchurch. Consistent activity was recorded across Northland, Tairāwhiti, Hawke's Bay, Waikato, Bay of Plenty, Taranaki, Manawatū, Wellington, Nelson-Tasman, Otago and Southland. Volumes are lower in those regions, but the spread shows that Navigator services are accessible to Pacific families in regional and rural communities as well as urban centres.

Activity was recorded across 31 territorial authorities against a commitment to cover Region 4 including 16 sub-regions.

Table 06: Geographic distribution of the Navigator Provider Network

Region	Partners	Share	Largest concentrations
Auckland South	18	38%	Māngere, Ōtara, Manurewa, Papakura, Papatoetoe
Midlands and Central Region	9	19%	South Waikato, Tokoroa, Rotorua, Gisborne, Taranaki, Hawkes Bay, Manawatu (Palmerston North provider)
South Island	6	13%	Christchurch, Oamaru, Ashburton, Dunedin, Invercargill
Auckland Central	5	10%	Panmure, Point England, Glen Innes, Avondale
Auckland West	4	8%	Henderson, New Lynn, Massey, Rānui
Wellington	4	8%	Porirua, Lower Hutt
Northland	2	4%	Whangārei, Kaikohe
Total	**48**	**100%**	**Northland to Southland**

Who we are reaching

The whānau engaged are predominantly Pacific, with Samoan and Tongan communities the largest groups. Around 89.6 percent of active whānau are Pacific.

Table 07: Whānau engaged by ethnicity

Ethnicity group	Share of active whānau
Samoan	42.3%
Tongan	23.4%
Cook Islands Māori	10.0%
Māori	6.1%
Fijian	5.5%
Other Pacific or Pacific not defined	4.7%
NZ European	2.3%
Tokelauan	2.2%
Niuean	1.5%
All other groups and not stated	2.0%

Demand and caseloads

At 30 June 2026, 127 of 128 Navigator FTE had achieved the minimum caseload of 10 active whānau. 50 FTE had reached the maximum caseload of 25, and a further 54 were supporting between 18 and 24 active whānau. The network average reached 21.62 active whānau per FTE, against a commissioning assumption of 17 to 18 by June 2026. Demand is running ahead of the model that funded it.

Approximately 2,800 individuals were progressing through intake, assessment and allocation at year end. We do not require Delivery Partners to hold waitlists, and we encourage Navigators at maximum caseload to refer whānau on, so they receive immediate support. That pipeline is our best available measure of unmet demand.

Complexity and risk

We use a standardised Complexity Classification Framework so that families with the highest needs receive the most intensive support, classified on the whole picture rather than a single presenting issue. Complexity exists across all caseloads with Navigators responding to housing instability, financial hardship, health needs, family violence, mental wellbeing and barriers to accessing services, usually several at once.

Navigators are actively identifying, recording and responding to risk as routine practice. Not every recorded risk event requires a standalone Safety Plan, because many risks are managed through whānau planning, regular engagement and provider-led processes. No critical incidents and no statutory escalations were recorded in any reporting period.

Across the three reporting periods, 46, 134 and 103 Safety Plans were created and 10, 11 and 5 were formally reviewed. The constraint is review and follow-up rather than plan development and strengthening the full safety planning lifecycle is a priority for 2026/27.

Table 08: Risk and safety reporting for year one

Required reporting	Mar–Jun 26
Vulnerable whānau identified	620
Incidents or risk events recorded	1,349
Unsafe whānau circumstances recorded	525
Unsafe work environments for Navigators or staff	0
Safety Plans created	103
Escalations required to statutory agencies	0

Network performance

In Year One we assessed Delivery Partner performance using a Proportionate Performance Index across caseload achievement, Whānau Plans developed, risk management completion and total practice quality. Caseload expectations are set against each partner's funded Navigator FTE, so smaller providers are not penalised for scale.

Table 09: Proportionate Performance Index results

Performance band	Oct 2025	Jun 2026	Definition
High or exemplary practice	10 of 49 (20%)	43 of 48 (90%)	Strong end-to-end practice
Developing or on track	29 of 49 (59%)	4 of 48 (8%)	Consistent practice
Priority support required	10 of 49 (20%)	1 of 48 (2%)	Targeted coaching and supervision in place

The movement from one in five partners at high or exemplary practice to nine in ten, within twelve months and across a network largely new to this work, is the clearest evidence that the capability-building approach is having effect.

The remaining variation is concentrated in a small group of partners and is organisational rather than individual. The response is set out under Capability uplift.


tālou

DELIVERY PARTNERS - OTHER WHANAU ORA INITIATIVES

COMMUNITY BASED CAPABILITY BUILDING (CBCB) & TARGETED SUPPORT SERVICES (TSS)

AUCKLAND

South Auckland

360 Tautua Trust Board*

5Gs Ltd**

Auckland Tokelau Society Inc (ATSI)*

Auckland Tokelau Society Inc (TKO)*

Baderdrive Community Trust**

Brown Pride NZ*

Congregational Christian Church of Samoa in NZ (Otara)*

Cook Islands Development Agency of NZ*

D65 Trust*

Failoa Famili Trust*

Falelalaga Limited*

Fonua Ola Trust*

Methodist Church of Samoa (NZ) Papatoetoe Parish*

Ola le Ola Aotearoa Trust*

Pacific Island Homecare Services Trust*

Penina Trust*

Samoa Methodist Manukau Au Uso - Womens Fellowship*

South Seas Healthcare Trust**

Taulanga U*

Tautai Fagota Sasa'a Trust*

The Methodist Church of New Zealand Te Haahi Weteriana O Aotearoa Otara Tongan Parish*

The TYLA Trust*

Tranzformation 4 U Limited*

United Church of Tonga*

Vaka Tautua Limited*

Central Auckland

Congregational Christian Church of Samoa (Sandringham) Trust*

Laupapa Trust*

Methodist Church Samoa (NZ) Mt Roskill Parish*

Onehunga Samoan Methodist Church*

Taulanga U*

TOA Pacific*

Tongan Health Society**

Vahefonua Tonga Methodist Mission (SIAOLA)**

Vaine Moonia Tongan Methodist Ponsonby Church*

Vaka Tautua Limited*

Vinnies Tamaki Makaurau Trust*

West Auckland

CCCS EFKS Pulega i Waitemata, New Zealand Trust*

Congregational Christian Church of Samoa Trust Board (Te Atatu)*

Ekalehia La Pale (ELP) Tokelau Tuvalu Aotearoa NZ Trust*

Fa'afouina EFKAS Ranui*

Leataata o le Lumana'i Samoa Trust**

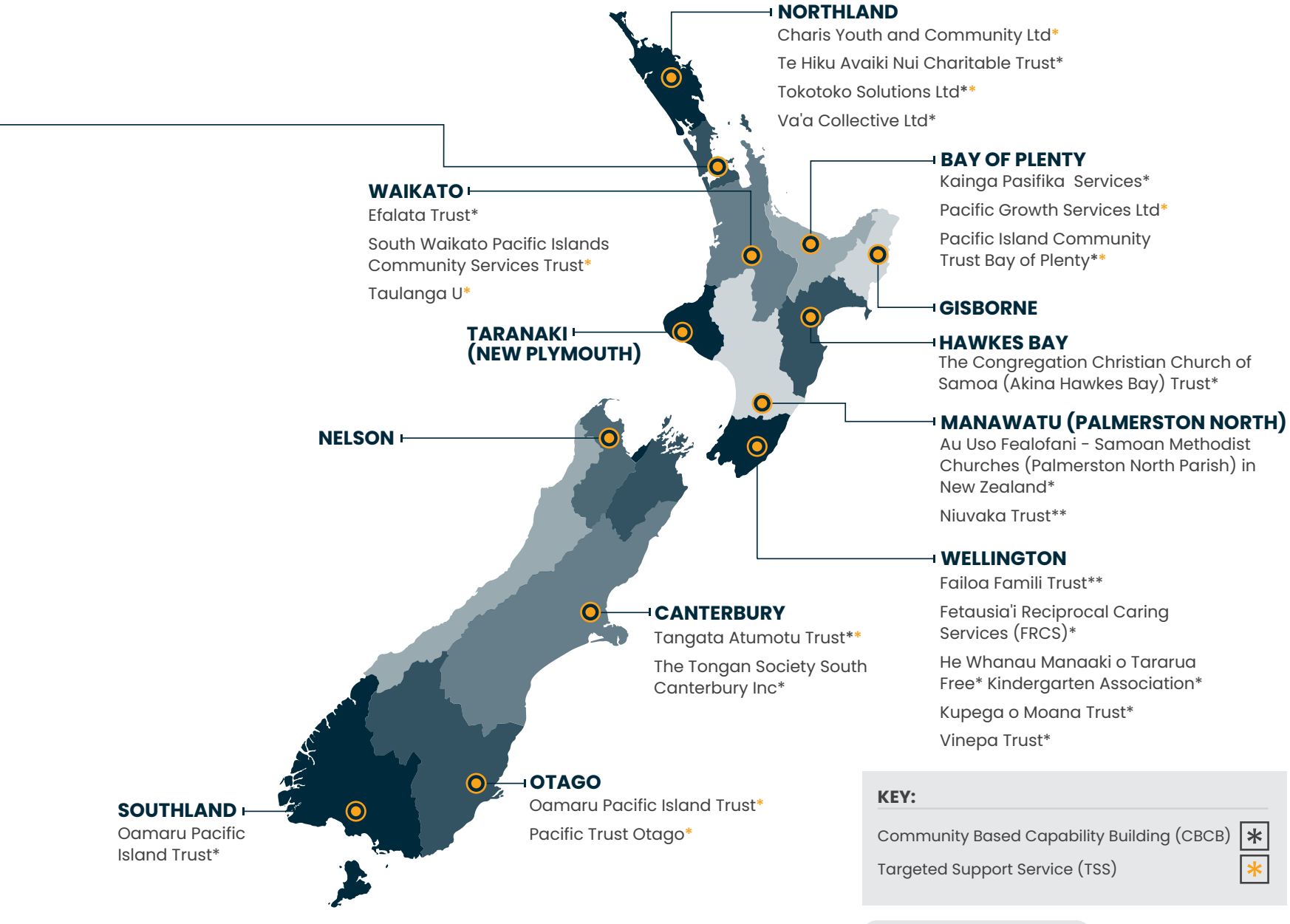
Methodist Church Samoa NZ Massey Parish

The Fono Trust**

Tuilaepa Youth Mentoring Service*

Tuvalu Alliance for Sustainable and Inclusive Development*

Tuvalu Auckland Community Trust*



NORTHLAND
Charis Youth and Community Ltd*
Te Hiku Avaiki Nui Charitable Trust*
Tokotoko Solutions Ltd**
Va'a Collective Ltd*

WAIKATO
Efalata Trust*
South Waikato Pacific Islands Community Services Trust*
Taulanga U*

BAY OF PLENTY
Kainga Pasifika Services*
Pacific Growth Services Ltd*
Pacific Island Community Trust Bay of Plenty**

GISBORNE

TARANAKI (NEW PLYMOUTH)

HAWKES BAY
The Congregation Christian Church of Samoa (Akina Hawkes Bay) Trust*

NELSON

MANAWATU (PALMERSTON NORTH)
Au Uso Fealofani - Samoan Methodist Churches (Palmerston North Parish) in New Zealand*
Niuvaka Trust**

WELLINGTON
Failoa Famili Trust**
Fetausia'i Reciprocal Caring Services (FRCS)*
He Whanau Manaaki o Tararua Free* Kindergarten Association*
Kupega o Moana Trust*
Vinepa Trust*

CANTERBURY
Tangata Atumotu Trust**
The Tongan Society South Canterbury Inc*

OTAGO
Oamaru Pacific Island Trust*
Pacific Trust Otago*

SOUTHLAND
Oamaru Pacific Island Trust*

KEY:

Community Based Capability Building (CBCB) *

Targeted Support Service (TSS) *

Last Update: 29 July, 2026

WHĀNAU PROGRESSION

How progression is measured

The Progression Framework is described under How we measure change. The four stages are defined below.

Stage	What it means
Aspiring	Whānau are beginning to identify areas for change and building trust with their Navigator.
Growing	Whānau are actively working toward goals and building momentum.
Strengthening	Whānau are consolidating gains and developing resilience.
Thriving	Whānau are sustaining wellbeing outcomes and contributing to their communities.

Across the year, we captured 14,282 domain-level assessment records across 31 territorial authorities. Each record is one family assessed against one wellbeing indicator, so a family completing all 14 domains contributes up to 14 records.

Need at onboarding

At onboarding, 52.9 percent of assessment records sat at Aspiring, the earliest stage. This indicates that investment is reaching families with substantial and complex need rather than those easiest to engage. The greatest concentration of early-stage need sits in Wealth Creation, Financial Security and Empowered Leaders.

Table 10: Movement in whānau progression stages from onboarding

Progression stage	At onboarding	Most recent	Change
Aspiring	7,559 (52.9%)	5,994	Down 1,565
Growing	4,178 (29.3%)	4,689	Up 511
Strengthening	1,833 (12.8%)	2,593	Up 760
Thriving	712 (5.0%)	895	Up 183

Movement between stages

We recorded 2,322 upward stage progressions across the year, against 290 at the previous reporting point. The most common movement was from Aspiring to Growing, accounting for 1,123 records. A further 495 moved from Growing to Strengthening and 164 from Strengthening to Thriving.

Five hundred and forty records showed multi-stage progression, being 23.3 percent of all upward movement. This includes 478 records moving from Aspiring to Strengthening and 35 moving directly from Aspiring to Thriving.

Downward movements totalled 210. These are treated as reflecting life events and reassessment rather than service failure.

Whānau enrolled for 6 to 24 months recorded 1,301 upward progressions, compared with 1,021 among those enrolled for less than six months, despite representing fewer assessment records.

That is an early indication that sustained Navigator relationships, rather than transactional contact, produce movement.

This is an indication rather than a causal finding, and it will be tested as the dataset matures.

In addition to the limitations noted in the Introduction, each reassessment rates every domain regardless of where Navigator effort was focused, so same-stage records are expected to dominate.

Where need is concentrated

Material hardship dominates need for Region 4. Wealth and Financial Security have the largest concentration of early-stage need and the lowest shift rates. Income, debt and housing costs are the primary constraint on progression and are not resolved by relationship-based practice alone.

Whānau Relationships records the highest proportion of Aspiring records shifting upward, at 27.8 percent. Te Ao Māori has the highest rate of Thriving of any domain, at 13.8 percent, which affirms the role of cultural grounding in wellbeing. We note that Pacific cultural context is currently recorded within that domain.

Table 11: Early-stage need and upward progression by wellbeing domain

Wellbeing domain	Aspiring at onboarding	Shifted up	Rate
Wealth Creation	830	156	18.8%
Financial Security	790	165	20.9%
Empowered Leaders	641	138	21.5%
Self-managing Whānau	590	137	23.2%
Improving Wellbeing	586	141	24.1%
Community Engagement	562	133	23.7%
Whānau and Community Connectedness	561	120	21.4%
Whānau Health	560	132	23.6%
Te Taiao	535	109	20.4%
Living Environments	439	104	23.7%

OTHER WHĀNAU INITIATIVES

The Investment Strategy guides the Other Whānau Initiatives Funding which is pathways beyond the Flexi-Fund.

The Whānau Flexi-Fund

The Flexi-Fund removes the practical barriers that stop families acting on their plans. Small, timely payments let a family take the next step towards education, employment, housing stability or another agreed goal. It is available only to whānau actively engaged with Navigator Services and it is administered through the Delivery Partners. At 30 June 2026, 35 Delivery Partners had provided Flexi-Fund reports totalling $1,714,014, being 53.6 percent of the $3.2 million annual budget.



Table 12: Flexi-Fund allocation by domain

Whānau Ora domain	Amount recorded in CRM	Share of spend
Financial	$644,555	45.5%
Health	$316,521	22.3%
Self-managing	$184,366	13.0%
Environment	$150,267	10.6%
Community	$75,565	5.3%
Resilient	$42,966	3.0%
Te Ao Māori	$3,054	0.2%
Total recorded in CRM	**$1,417,294**	**100%**

Nearly half of recorded spend went to financial security and wealth creation, and a further fifth went towards health. This aligns with where progression data shows early-stage need is concentrated. Performance varied across the network. Seven Delivery Partners fully spent their allocation. Fourteen spent less than 30 percent.

TARGETED SUPPORT SERVICES AND COMMUNITY BASED CAPABILITY BUILDING FUNDING PATHWAYS

Both pathways were procured through formal tender processes run concurrently, with independent probity assurance. The Targeted Support Services Request for Proposal was closed to the Tātou community and provider network as it primarily supported existing Navigator Services. The Community Based Capability Building Request for Proposal was openly advertised.

Demand exceeded supply by a wide margin. The two rounds attracted proposals seeking more than $25 million against the $5.8 million available, which indicates the scale of Pacific community capability that is ready to be funded and is not currently funded. Applications were assessed by two independent evaluation panels of three members each and moderated for consistency against published criteria. The Tātou Collective Board approved the 2025/26 Purchasing Plan which was also endorsed by the Investment Board.

Targeted Support Services

This pathway invests in specialist services that remove the bottlenecks preventing whānau progression - such as service gaps, long wait times or a lack of culturally appropriate support. The full 2025/26 allocation of $3.0 million was committed, across 26 allocations to 25 delivery partners on two-year contract terms.



Table 13: Regional allocations for Targeted Support Services

Region	Providers	Allocation	Share
Auckland South	8	$1,470,000	49.0%
Auckland Central	3	$360,000	12.0%
Auckland West	2	$215,000	7.2%
Wellington	2	$215,000	7.2%
Waikato	2	$170,000	5.7%
Bay of Plenty and Hawke's Bay	2	$135,000	4.5%
Canterbury	1	$120,000	4.0%
Northland	2	$100,000	3.3%
Otago	2	$100,000	3.3%
Manawatū	1	$65,000	2.2%
Southland	1	$50,000	1.7%
Total	**26**	**$3,000,000**	**100%**

The regional distribution follows the Investment Strategy's Allocation Framework closely. Auckland South holds 49 percent, at the top of its indicated 46 to 49 percent range, which is where the largest Pacific population, the highest deprivation and the greatest system pressure sit.

Table 14: Successful Targeted Support Services organisations

	Organisation	Region and subregion	What they deliver
1	**Pacific Island Homecare Services Trust**	Auckland South: Ōtara, Clendon, Papakura, Māngere	In-home support, disability and elder care, housing navigation, employment and family barriers.
2	**South Seas Healthcare Trust**	Auckland South: Ōtara, Papatoetoe	Health, mental health and social services, housing navigation.
3	**Penina Trust**	Auckland South: Manurewa	Housing stabilisation, family wellbeing and parenting support.
4	**Vaka Tautua Ltd**	Auckland South: Papatoetoe	Disability support, older Pacific, employment pathways and financial capability.
5	**Bader Drive Community Trust**	Auckland South: Māngere, Manurewa	Financial capability, housing stability, employment training, language access and family wellbeing.

	Organisation	Region and subregion	What they deliver
6	**Fonua Ola Trust**	Auckland South	Wraparound employment, financial capability, housing and youth support.
7	**Brown Pride NZ**	Auckland South: Māngere East, Ōtara	Youth justice, Pacific young men, and the Whānau Progression Hub.
8	**Moana Connect (5Gs Ltd)**	Auckland South: Māngere	Moana Malosi employment programme and family capability.
9	**Tongan Health Society Incorporated**	Auckland Central: Panmure, Point England	Health, mental health, employment and support for Tongan families.
10	**Vaka Tautua Ltd**	Auckland Central: Avondale	Disability support, older Pacific, employment and financial capability.
11	**Vahefonua Tongan Methodist Mission Trust**	Auckland Central: Glen Innes	Faith-community family services and pastoral care with social navigation.

	Organisation	Region and subregion	What they deliver
12	**The Fono Trust**	Auckland West: Henderson, New Lynn	Primary health, youth health, community services and housing navigation.
13	**Leataata o le Lumana'i Samoa Trust**	Auckland West: Massey, Ranui	Counselling and therapeutic support for Samoan families.
14	**He Whanau Manaaki o Tararua Free Kindergarten Association Incorporated (Piri'anga Alofa)**	Wellington: Porirua	Navigation, family support, crisis response, youth and housing.
15	**Failoa Famili Trust**	Wellington: Lower Hutt	Family strengthening, whānau wellbeing and the Newstart programme.
16	**Niuvaka Trust**	Manawatū: Palmerston North	Pacific family support and navigation access.
17	**South Waikato Pacific Islands Community Services Trust**	Waikato: South Waikato	Employment, youth transitions, family wellbeing and community development.

	Organisation	Region and subregion	What they deliver
18	**Taulanga Ū**	Waikato: South Waikato	Financial literacy and Tongan and pan-Pacific family wellbeing.
19	**Pacific Island Community Trust Bay of Plenty**	Bay of Plenty and Hawke's Bay: Tauranga	Housing navigation, employment, financial capability, youth engagement and family wellbeing.
20	**Pacific Growth Services Ltd**	Bay of Plenty and Hawke's Bay: Rotorua, Tauranga	Employment pathways, social enterprise and youth transitions.
21	**Tangata Atumotu Trust**	Canterbury: Aranui, Linwood, Wainoni	Youth mental health, employment and training pathways, family support and community navigation.
22	**Tokotoko Solutions Ltd**	Northland: Whangārei	Housing navigation, employment, financial capability and community coordination.

	Organisation	Region and subregion	What they deliver
23	**Charis Youth and Community Limited**	Northland: Kaikohe, Whangārei	Youth mentoring, family wellbeing and Pacific youth leadership.
24	**Pacific Trust Otago**	Otago: Dunedin	Employment pathways, financial capability and community navigation.
25	**Oamaru Pacific Trust**	Otago: Oamaru	Community support, self-management and whānau navigation
26	**Pacific Island Advisory Charitable Trust**	Southland: Invercargill	Community navigation and Pacific family support



Community Based Capability Building Fund

This pathway strengthens the communities that support whānau before problems escalate to the point of needing an intervention. It invests in trusted community infrastructure, largely churches, cultural organisations and community networks, and extends the reach of Whānau Ora well beyond individual Navigator caseloads. The full 2025/26 allocation of $2.8 million was committed, across 56 allocations to 53 organisations on twelve-month contract terms. Thirty-one of those organisations were new to the Tātou Collective network.

Table 15: Regional allocation for Community Based Capability Building Fund

Region	Allocations	Allocation	Share
Auckland South	20	$1,370,000	48.9%
Auckland Central	10	$420,000	15.0%
Auckland West	10	$340,000	12.1%
Wellington	4	$160,000	5.7%
Canterbury and South Canterbury	2	$120,000	4.3%
Northland	3	$110,000	3.9%
Palmerston North	2	$100,000	3.6%
Bay of Plenty and Hawke's Bay	3	$90,000	3.2%
Waikato	1	$70,000	2.5%
Otago and Southland	1	$20,000	0.7%
Total	**56**	**$2,800,000**	**100%**

Table 16: Successful Community Based Capability Building organisations

	Organisation	Region	What they deliver
1	**Methodist Church Samoa NZ Mt Roskill Parish**	Auckland Central	Family and cultural identity
2	**Congregational Christian Church in Samoa (Sandringham) Trust Board**	Auckland Central	Youth and family
3	**Onehunga Samoan Methodist Church**	Auckland Central	Youth and family
4	**Taulanga Ū**	Auckland Central	Youth and employment
5	**Tongan Health Society Incorporated**	Auckland Central	Youth and cultural wellbeing
6	**Vaine Moonia Tongan Methodist Mission**	Auckland Central	Family and health wellbeing
7	**TOA Pacific Incorporated**	Auckland Central	Youth leadership
8	**Laupapa Trust**	Auckland Central	Employment and community wellbeing

	Organisation	Region	What they deliver
9	**Vahefonua Tonga Methodist Mission Trust**	Auckland Central	Youth
10	**Vinnies Tāmaki Makaurau Trust**	Auckland Central	Housing and family wellbeing
11	**Auckland Tokelau Society (ATSI)**	Auckland South	Housing and health
12	**Auckland Tokelau Society (TKO)**	Auckland South	Cultural wellbeing
13	**Samoan Methodist Church (Manukau Parish)**	Auckland South	Family wellbeing
14	**360 Tautua Trust Board**	Auckland South	Elderly care and family
15	**Moana Connect (5Gs Ltd)**	Auckland South	Housing and employment
16	**Bader Drive Community Trust**	Auckland South	Housing and family
17	**Congregational Christian Church Samoa in NZ (Ōtara)**	Auckland South	Youth and employment

	Organisation	Region	What they deliver
18	**Cook Islands Development Agency of NZ**	Auckland South	Employment and education
19	**D65 Trust**	Auckland South	Youth and family
20	**Falelalaga Limited**	Auckland South	Youth and employment
21	**Failoa Famili Trust**	Auckland South	Family and housing
22	**Taulanga Ū**	Auckland South	Youth and employment
23	**Methodist Church Samoa NZ Papatoetoe Parish**	Auckland South	Youth and cultural identity
24	**Ola le Ola Aotearoa Trust**	Auckland South	Housing and family
25	**United Church of Tonga in NZ Trust Board**	Auckland South	Cultural and spiritual identity
26	**South Seas Healthcare Trust**	Auckland South	Health and family wellbeing

	Organisation	Region	What they deliver
27	**Tautai Fagota Sasa'a**	Auckland South	Cultural identity
28	**Methodist Church NZ, Tongan Parish Ōtara**	Auckland South	Cultural and youth
29	**The TYLA Trust**	Auckland South	Youth and family
30	**Tranzformation 4 U Limited**	Auckland South	Housing and employment
31	**Methodist Church Samoa NZ Massey Parish**	Auckland West	Elderly care and youth
32	**The Congregational Christian Church of Samoa (Te Atatū) Trust Board**	Auckland West	Cultural identity
33	**CCCS EFKS Pulega i Waitematā NZ**	Auckland West	Cultural and youth
34	**Fa'afouina EFKAS Ranui**	Auckland West	Spiritual and cultural

	Organisation	Region	What they deliver
35	**Leataata o le Lumana'i Samoa Trust**	Auckland West	Youth and family
36	**The Fono Trust**	Auckland West	Health and family
37	**Tuilaepa Youth Mentoring Services Trust**	Auckland West	Youth leadership
38	**Tuvalu Auckland Community Trust**	Auckland West	Cultural and employment
39	**Ekalehia La Pale Tokelau Tuvalu Aotearoa NZ Trust**	Auckland West	Pastoral and family support
40	**Tuvalu Alliance for Sustainable and Inclusive Development**	Auckland West	Cultural wellbeing
41	**Kāinga Pasifika Services**	Bay of Plenty and Hawke's Bay	Housing and youth
42	**Pacific Island Community Trust Bay of Plenty**	Bay of Plenty and Hawke's Bay	Community development

	Organisation	Region	What they deliver
43	**The Congregational Christian Church Akina Hawke's Bay Trust**	Bay of Plenty and Hawke's Bay	Youth and family
44	**The Tongan Society South Canterbury Incorporated**	Canterbury and South Canterbury	Employment and community
45	**Tangata Atumotu Trust**	Canterbury	Cultural identity and social connection
46	**Te Hiku Avaiki Nui Charitable Trust**	Northland	Cultural and youth
47	**Va'a Collective Ltd**	Northland	Housing and family
48	**Tokotoko Solutions Ltd**	Northland	Housing and employment
49	**Oamaru Pacific Island Trust**	Otago and Southland	Housing and family
50	**Efalata Trust**	Waikato	Youth and family
51	**Fetausia'i Reciprocal Caring Services**	Wellington	Youth and cultural wellbeing
52	**Failoa Famili Trust**	Wellington	Family and housing
53	**Kupega o Moana Trust**	Wellington	Community resilience
54	**Vinepa Trust**	Wellington	Housing and youth
55	**Niuvaka Trust**	Palmerston North	Financial capability
56	**Samoan Methodist Churches (Palmerston North Parish) in NZ**	Palmerston North	Youth and cultural wellbeing

Together, these two pathways committed $5.8 million and introduced 33 organisations to the wider Tātou Collective network in a single quarter, extending coverage into parts of the Manawatū and South Canterbury for the first time. The effect of payment timing on the 2025/26 accounts is explained in the Financial summary.

PROBITY, ASSURANCE AND ACCOUNTABILITY

Grant Thornton was engaged before each process ran rather than review it afterwards. For the Navigator round, Grant Thornton attended the Board meeting at which supplier recommendations were presented and confirmed directly to the Board that the process had been conducted in accordance with probity best practice. Its statement records:

> *In our professional opinion, the procurement process was conducted to a high standard, with fairness, transparency, and integrity upheld throughout. The process was well-managed by the Tātou procurement team, and all communications were open, professional, and consistent with good procurement practice. No probity concerns have been identified during this process.*
>
> *Grant Thornton New Zealand Limited, Probity Assurance Statement, 19 June 2026*

Conflicts of interest

Among local community networks potential or actual conflicts of interest are an expected feature where people serve on multiple boards, share the same services, worship in the same churches and belong to the same villages. The control is that they are declared, recorded and managed.

Table 17: Reported Conflicts of Interest

Measure	Year One	Notes
New conflicts identified and declared	65 across the year	12, then 7, then 46 by reporting period.
Conflicts updated or resolved	11	Resolved and closed.
Conflict management plans prepared or updated	7	Declared and recorded.
Conflicts requiring notification to Te Puni Kōkiri	0	
Delivery Partner conflicts declared	2	Both managed under the partner's own policy.

The sharp rise in the final reporting period reflects Investment Board members' declarations being processed for the first time following their induction, not a deterioration in practice. When a Delivery Partner notifies a conflict, it is reviewed and steps are taken to remove, mitigate or manage it.

Audit and assurance

The integrated Whānau Ora Audit Programme, developed through the Sector Capability Uplift Fund, will assess both system compliance and how requirements are being implemented in practice, including whānau experience and outcomes. Year One has focused on design, provider readiness, self-assessment and testing, with formal assurance activity to commence in Year Two.

Data integrity

Delivery Partners have reported through a central platform since 1 July 2025. Dual verification with the system vendor continues, and no material errors were identified in the final Year One service and progression figures following validation. Address verification is now required for new records, while verification of legacy records continues. This provides increasing confidence that reported service coverage reflects the geographic distribution of whānau and Delivery Partner activity.



FINANCIAL SUMMARY

For the year ended 30 June 2026, Tātou Collective Limited recorded a net operating surplus of $893,043. Total revenue was $23,510,531, comprising $22,400,000 of commissioning and management funding and $1,110,531 of exchange revenue.

The $19,042,471 cost of providing services included $14,844,794 of Navigator commissioning costs, $3,200,000 of Other Whānau Initiatives commissioning costs and $997,677 of workforce development and provider uplift costs. Operating expenses were $2,642,620 and total administration expenses, including depreciation and amortisation, were $932,397.

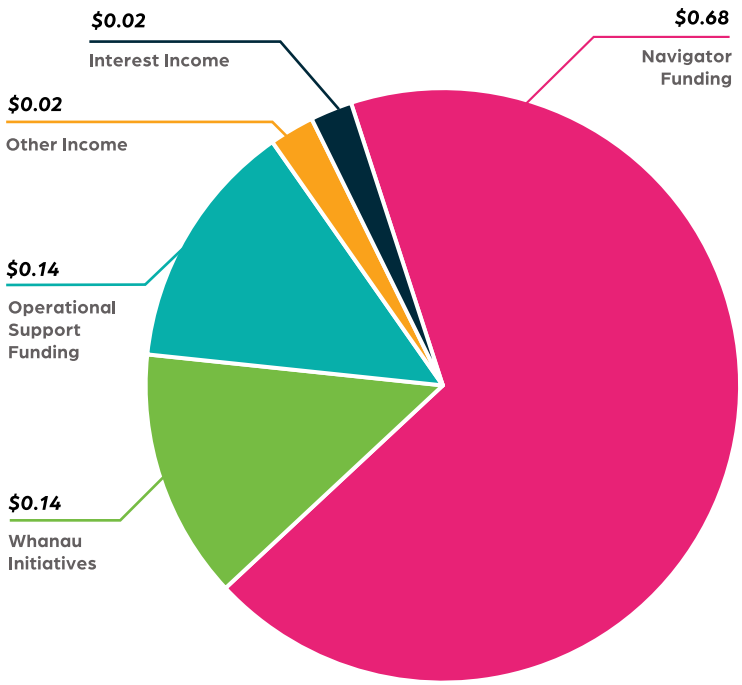
Year-end Financial Position as at 30 June 2026, cash and cash equivalents were $8,009,447, income in advance was $6,355,000, and net assets were $621,148. Income in advance represents funding recognised as a liability at balance date rather than revenue for the year. The surplus increased equity from a deficit of $271,895 at the start of the year to $621,148 at year end. The figures below agree to the signed financial statements.

Table 18: Financial Performance Year Ended 30 June 2026

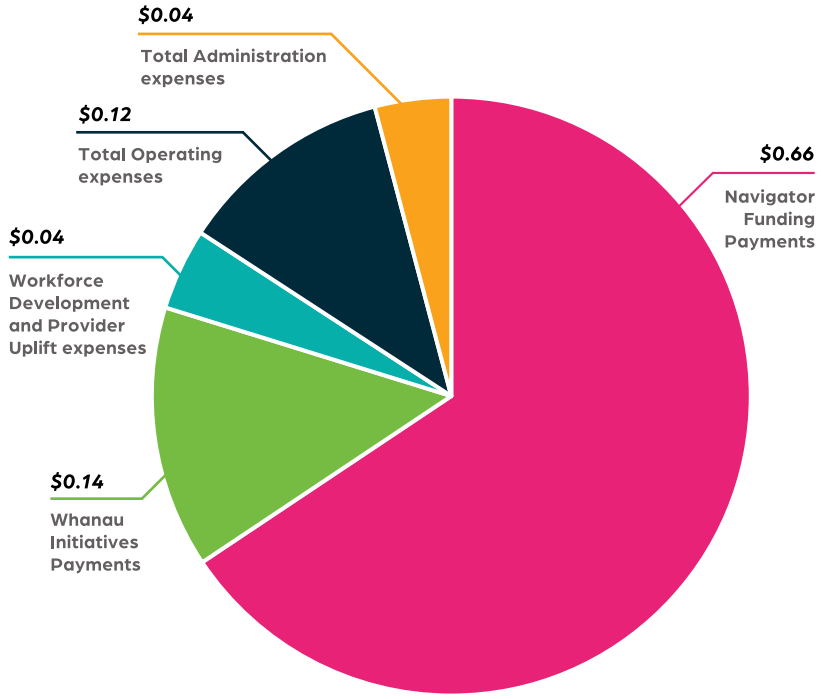
Financial performance	2026 actual ($)
Revenue from non-exchange transactions	22,400,000
Revenue from exchange transactions	1,110,531
Total revenue	23,510,531
Cost of providing services	(19,042,471)
Operating expenses	(2,642,620)
Administration expenses	(927,449)
Depreciation and amortisation	(4,948)
Net operating surplus	893,043

FINANCIAL SUMMARY ANALYSIS

REVENUE ANALYSIS BY EACH DOLLAR RECEIVED



EXPENDITURE ANALYSIS BY EACH DOLLAR SPENT



Total Revenue	$23,510,531
Total Cost of Services	$19,042,471
Gross Surplus	$4,468,060
Net Surplus	$ 893,043
Navigator Funding	$16,000,000

FUTURE DIRECTIONS

Tātou Collective's first year was primarily one of establishment. We were building a new commissioning agency, establishing a national provider network and developing an evidence base at the same time. Twelve months ago, the immediate priority was introducing new Navigator Services requirements and supporting the frontline workforce to implement them. As we enter Year Two, the focus is becoming more targeted: strengthening organisational capability where gaps remain, putting better digital tools in the hands of Navigators and improving consistency in areas such as safety planning, practice and reporting.

There are encouraging signs from Year One. Tātou Collective established a national network at pace, directed investment towards communities experiencing higher levels of deprivation, and improved delivery quality across a largely new provider network. We also subjected our procurement processes to independent probity assurance and have been willing to test our own performance and data through external scrutiny.

These are important foundations, but they are not the end measure of success. The more important question for Years Two and Three is whether stronger commissioning and delivery translate into measurable and sustained improvements in the lives of whānau. We do not yet have all the evidence to answer that question. Our priority now is to build that evidence systematically and be transparent about what it tells us.

Table 19: Our priorities for 2026/27

Priority
Targeted provider capability development
Strengthening the safety planning lifecycle
Managing workload as complexity rises
Strengthening Flexi-Fund reporting and reconciliation
Improving digital capability for Navigators
Capability supports the 33 new organisations
Operationalising the Stabilisation Fund
Building the evidence of impact
Strengthening provider leadership and collective accountability



Tātou Collective

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