



Ageing Well National Science Challenge

Kia eke kairangi ki te taikaumātuatanga

Future Strategy 2019-2024

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1. LONG TERM VIEW

The Ageing Well National Science Challenge *Kia eke kairangi ki te taikaumātuatanga* (“the Challenge”) is committed to producing the evidence and tools for all New Zealanders to achieve positive and healthy ageing. We will support transformational change through which society will recognise the value and importance of lifelong good health and wellbeing, will acknowledge that all older people have skills, knowledge, and experience to contribute, and will ensure all older people can be active participants for as long as possible.

As a result of the Challenge’s research, people will think differently about older people; the idea of ageing will be framed in a more positive perspective, as opposed to the current ‘deficit-based’ approach. Such thinking will be linked not only with systems that are (re)oriented for better service quality and delivery, but also with people being better supported to live in their own homes and communities for longer, empowering all of our citizens to age well. Critically, the work of the Challenge will result in reduced disparities in ageing well across the population, partly as a result of identification of different pathways to support healthy ageing for people of different backgrounds and communities. In particular, there will be transformative change for older Māori and their whānau.

The significance of changing thinking and reducing inequity cannot be overemphasised given the demographic shift New Zealand is experiencing. The older segment of the population (65 years and over) is projected to grow by almost 678,000 (108%) between 2013 and 2038. By 2038 there will be more than 1.3 million aged 65 years and over, representing 22.6% of the population, compared to just 14.1% in 2013. Over the same time period, some of our ethnic groups will experience even greater growth in the numbers in the 65 years and over age group: 244% for Māori, 235% for Pacific peoples, and 537% for Asians. We need to maximise their life experiences, and their contributions to the whole of society.

The Challenge will leave a legacy of a changed research paradigm. Initially, we developed a multi-disciplinary approach to research. In the next five years, we will create the conditions that deliver a sustainable change in how ageing research is undertaken. Our approach of supporting coordinated, national level, multi-disciplinary expert groups, will be a step change for our stakeholders¹ and research community. We will also champion lifecourse and intergenerational research methodologies. Feedback from Māori and Pacific groups strongly endorse this approach and the Challenge will embrace this, so it has life beyond 2024.

As was once said; *“Old age is like everything else. To make a success of it, you’ve got to start young.”* (Theodore Roosevelt)

¹ Stakeholder: we use this term to mean all those organisations and groups who have an interest in the work of the Challenge. This covers those who might be directly working with older New Zealanders, those who set direction and influence funding for services, programmes and systems, and those who engage in or manage relevant research. We also use the term “end-user” on occasion, by which we mean those who more directly are positioned to pick up and use what is created through the Challenge. Not all stakeholders are likely to be significant end-users, but all end-users are stakeholders.

2. FIVE YEAR STRATEGY

The Ageing Well Challenge Objective is to “*harness science to sustain health and wellbeing into the later years of life*”.

2.1 *Developing the Strategy*

The second five year period of research investment will build directly upon the progress towards the Objective achieved in the work undertaken to date (2015-2018). Development of our future strategy has been led by the Strategic Advisory Group and Directorate, overseen by the Governance Group. This strategy has been informed by a variety of sources and resources, including: previous and current research in New Zealand and internationally, widespread engagement with diverse groups and communities, and strategic partnerships with other funding agencies and research consortia.

The Challenge has undertaken several reviews of previous and current research in New Zealand, principally looking at funded projects and research outputs. This included creation of a dedicated, comprehensive bibliography of New Zealand ageing well literature for the period 2000-2016, and review of ageing well-related funding awards by the key national funding agencies for the same period. As strategic planning proceeded, we also commissioned a dedicated review of the literature related to ageing and Māori, particularly to inform work on the development of the Ageing and Māori Focus Area and associated research priorities.


The consultation has led to the proposed *Focus Areas* and *Research Priorities* ([Section 2.3](#) and [Section 2.4](#)), and investment processes. The consultation involved extensive engagement across sectors, communities, researchers, and with relevant ministries and agencies, commencing in early 2017.

This has specifically included:

- SNAP Roadshows
- A National Online Consultation
- Face to face meetings with relevant ministries, NGOs, and agencies
- A dedicated Māori engagement strategy

SNAP Roadshows (Stakeholder Network for Action Partnerships) brought together researchers, agencies, and stakeholders. The inaugural SNAP event was held in Wellington at Te Papa in September 2016; this event was followed by a nationwide series of roadshows during the first half of 2017 in Dunedin, Christchurch, Wellington, Hamilton and Auckland. The facilitated discussions at each of these events were wide ranging, and included feedback on proposed focus areas and research priorities. Given the success of this approach to inform research funding areas, a manuscript describing the process used in these roadshows has been prepared and submitted for publication.

National Online Consultation A National Online Consultation was used to obtain feedback from a wider range of stakeholders than was attracted to the SNAP Roadshows. The format and content reflected feedback from the SNAP Roadshows and resultant recommendations from the Strategic Advisory Group, and included a background paper providing context, a



questionnaire, and opportunity for free text comments. The Consultation went live on 13th September 2017, with the link emailed to over 700 stakeholders from our contact database. The link was also shared on social media platforms, Facebook and Twitter, the Challenge website, and in our September 2017 newsletter. The consultation opportunity remained open for one month, and during this time two reminder emails were sent to all the stakeholders. We received a total of 162 responses; 13 participants opted to fill in the paper-based version of the questionnaire.


Face to face meetings focussed on plans for the next five years investment were held with key agencies, NGOs, and Ministries in October 2017 to gain feedback on the proposed Focus Areas, Research Priorities, and funding allocation methods.

These face to face meetings included:

- Age Concern New Zealand
- Community Housing
- Grey Power Federation
- Home and Community Health Association
- Move Well Live Well
- New Zealand Council of Christian Social Services
- Victoria University of Wellington
- Waiti Research
- Accident Compensation Corporation
- Ministry of Social Development's Office for Seniors
- Ministry of Health
- Ministry of Business Innovation and Employment
- Social Policy Research and Evaluation Unit

Engagement with Māori stakeholders and organisations The engagement process was developed in collaboration with, and was supported by, Māori members of the Directorate, Strategic Advisory Group, and the Governance Group. A literature review that examined health for older Māori was also commissioned, and was used to inform discussions. Groups involved were:

- Māori Womens Welfare League
- Māori General Managers of District Health Boards
- Representatives from regional service providers (e.g. Raukura Hauora Primary Health Organisation) and Whānau Ora commissioning agencies (e.g. Te Pou Matakana – which covers the North Island)
- Urban Māori organisations (e.g. Waipareira Trust)
- Māori researchers funded by the Challenge, within Brain Research New Zealand, and those undertaking research with a lifecourse perspective
- The University of Otago's Office of Māori Development which has an important role in managing the university's Treaty partnerships. The Challenge is hosted by the University of Otago



Findings from Māori engagement have been influential on the overall future strategy.

- Positive Māori ageing is a lifelong process that begins long before Māori reach 65 years of age.
- The cumulative effects of lifelong disadvantage result in Māori having less chance to enjoy old age, compared to non-Māori (e.g. early onset of diseases associated with advanced age).
- Ageing for Māori occurs within the context of whānau ora, therefore whānau wellbeing and ageing well for Māori are inextricably linked.
- Ageing occurs within the context of hapū (subtribe), iwi (tribe), and hāpori (community).
- Older Māori have diverse realities, with contrasts between those who are culturally connected, embraced by their communities and who take on cultural roles, and those who are less connected and thus, may face increasing isolation with fewer resources to ease their way into old age.
- Māori service providers and communities want evidence that can inform policy makers and programme funders to support interventions that work for older Māori and improve the experience of ageing.
- There is a growing ageing Māori population and research needs to consider issues facing older Māori now and in the future.

2.2 Future Strategy Overview

Consultation delivered a strong view that the original Gazette themes are too compartmentalised to facilitate the next phase of multidisciplinary, cross-institutional collaborations. Heading into the 2019-2024 funding period, the Challenge therefore proposes that we act on the **three themes** through **two Focus Areas**, allowing research to take a more integrated approach. These Focus Areas are *Health and Wellbeing in Ageing* and *Ageing and Māori* (Figure 1 below). The scope and goals for each are expressed as outcome statements and are described in [Section 2.3](#) and [Section 2.4](#).

The **Focus Areas** were identified after detailed discussion and consideration by the Directorate, the Strategic Advisory Group, and the Governance Group on the basis that they:

- Thematically integrate multiple pieces of research
- Align with the Objective
- Can deliver significant and transformative outcomes² within funding and timeline constraints
- Are supported by existing research capacity and capability in New Zealand
- Build from current and aligned research and are informed by analysis of gaps
- Provide opportunity to deliver equity and/or reduce inequality for Māori and Pacific people, including delivering to Vision Mātauranga
- Are areas where important stakeholders are engaged, or are likely to be engaged, with the Challenge in translation and implementation of research outcomes

² The terms outcome and impact are often mis-understood. Simply expressed, we mean impact as a longer term effect arising from a research outcome. An outcome is more near term, more limited in scope, and can usually be defined in advance and measured. An impact typically will be much broader, although it can be hard to distinguish a bright line between the two ideas.



Figure 1 Ageing Well Focus Areas for 2019-2024. The work of the Challenge will be narrowed to two Focus Areas, supported by specific Strategic Investment Initiatives.

While the Objective and scope of the Challenge has not changed, these Focus Areas will promote a more holistic approach to the ageing individual and their family/whānau and community, will enable the Challenge to coordinate activities that will lead to impact, and seen as more meaningful by stakeholders. Compartmentalisation has also been reduced from the perspective that we will not continue to use the original framework of five research strands: maintain wellness, independence and autonomy; promote social integration and engagement; value older people in all settings, reduce disability and the impact of disability; and enhance age-friendly environments. These strands were useful in initiating research collaboration and cross-disciplinary working but our revised Focus Areas represent a natural development which will result in greater integration and coordination of research activities, and a greater emphasis on outcomes and impact.

Research Priorities have been defined for each Focus Area ([Section 2.3](#) and [Section 2.4](#)) based on feedback through the consultation. These Research Priorities will be used to direct Challenge funding within each Focus Area. The Research Priorities appear quite broad, but this approach is supported by the Directorate, the Strategic Advisory Group and the Governance Group on the basis that they are quite directive about what is to be achieved and that greater specification is not helpful. There is relatively constrained New Zealand capacity in the research field of ageing, therefore we do not wish to write priorities in a way that immediately narrows the opportunities to one or two research providers, or limits the types of research. Rather, the strategy is to indicate general areas that have been determined, through consultation, that matter most for New Zealand, and to prescribe the “ethos” for the research. The Challenge will expect potential providers to propose work programmes that fit within the priorities, and to justify their approach in terms of ability to deliver, including the outcomes that can be realistically achieved.




Figure 2 Cross-cutting themes provide integration across research activities.

Integrating the Focus Areas, the Strategy includes four **cross-cutting themes** ([Section 2.5](#)):

- Equitable outcomes for diverse communities
- Delivering on *Vision Mātauranga*
- Considering intergenerational relationships
- Taking a lifecourse approach

Part of the Challenge’s strategy for the next five years, is a **purposeful, multi-phase research investment approach**. The principal research investment vehicle will be an open tendering process to identify two research programmes, one working in each Focus Area, each co-ordinated by a host organisation. These programmes will be multi-disciplinary and multi-institutional and will coordinate research, stakeholder relationships, and knowledge transfer activities that contribute to the outcome statement for the respective Focus Area and, therefore, to the Objective.

While the majority of the budget for a Focus Area will be contracted to the host organisation of the research programme, a proportion will be retained to support **emergent opportunities** relating to each Focus Area. As an example of a possible emergent opportunity, some of the research supported to date has delivered unexpected findings that are worth follow-up; brief, low budget support to allow this follow-up research could achieve unexpected but significant outcomes. At the end of the current funding period we will run a process amongst current contract holders to identify this type of opportunity. The emergent opportunities approach also provides the mechanism to respond to currently unrecognised opportunities or risks, and to support dynamism in Challenge capability as needs evolve.



In addition, **strategic investment initiatives** ([Section 2.6](#)) will complement the work of the research programmes by supporting research that captures synergies across the two Focus Areas.

2.3 Focus Area: Health and Wellbeing in Ageing

Outcome Statement

All older people are given opportunities and tools to support their physical/functional and mental abilities, and the interaction of these capacities with their own unique environments. This may include reshaping of physical environments, so these environments encourage engagement and participation.

Research Priorities

Research which supports and develops:

- Design and delivery of culturally relevant interventions for health promotion, that support autonomous daily functioning and wellbeing through sustaining physical and mental capacity, and social connectedness.
- Design and delivery of effective and efficient health and social services for older people to enhance access, quality and provision of services, while addressing multi-morbidity and complex geographic, social, family, financial and housing circumstances

2.4 Focus Area: Ageing and Māori

Outcome Statement

Positive Māori ageing is supported by evidence from Māori-led research undertaken in collaboration with key stakeholders (e.g. Māori service providers and communities). Research derived evidence is used to inform policy makers and programme funders on how to best support programmes that work for older Māori and their whānau and which prevent compromised ageing.

Research Priorities

A number of research priorities were identified as a result of our Māori engagement strategy. The following are examples:

- Equitable access to culturally appropriate services and respectful relationships between Māori and service providers/professionals. This includes end-of-life care and supporting whānau carers.
- Social connectedness, including having strong cultural connection, being valued, having purpose, making a contribution, inclusion, mitigating loneliness, and the use of technology to stay connected.
- Research with Māori who are ageing well (e.g. physical, mental, cognitive health and wellbeing) and ageing well over time (e.g. longitudinally).
- Structural, social, and environmental determinants of positive ageing, in particular housing, and also land, financial stability, transportation, proximity to services, and places of meaning.

- Cultural roles and responsibilities within whānau and communities as kaumātua and leaders, including the intergenerational transfer of knowledge and legacy.
- Data (e.g. demographic information) to identify current issues for Māori and also provide information to inform long term future planning for a growing ageing Māori population.

There are particular features that research in the Ageing and Māori Focus Area must include, to meet the expectations of Māori stakeholders and communities:

- Ageing and Māori research needs to be Māori-led. It should be consistent with Māori research principles (e.g. self-determination, benefit for Māori, transformation of power relationships, validity of Māori worldviews, the importance of cultural heritage, Māori are located at the centre, strengths-based).
- Ageing and Māori research projects should incorporate a kaumātua-centred lens with kaumātua actively participating as members of the research team and throughout the research process (e.g. as advisors and participants) to provide a kaumātua perspective at all levels and over time.
- Research should be multidisciplinary (in keeping with the overall requirements of the Challenge).
- Research should make a strong and consistent contribution to building Māori research capacity and capability.
- Researchers should work with providers and communities to ensure that research is undertaken that leads to findings being used to implement change and inform programming.
- Research supports the goals of Vision Mātauranga, in particular unlocking the innovation potential of Māori knowledge, resources, and people.

2.5 Cross-cutting themes

Four cross-cutting themes will integrate work in the two Focus Areas. The first two cross-cutting themes – “*equitable outcomes for diverse communities*”, and “*delivering on Vision Mātauranga*” – reflect our work to date, but are now given greater weight and are considered mandatory for all Challenge research in the future.

The second pair of cross-cutting themes – “*considering intergenerational relationships*”, and “*taking a lifecourse approach*” – are new considerations and arise directly out of stakeholder recommendations. We see significant value in these in relation to achieving the Objective, but also recognise that they may not apply in all research contexts. Consequently, the Challenge expects these cross-cutting themes are *considered* in design and delivery of all research.

Equitable Outcomes for Diverse Communities

The research programme for each Focus Area is *required* to articulate how the research programme will support equitable outcomes for New Zealand’s diverse communities. For this purpose, equity is defined by the absence of avoidable or remediable differences amongst groups of people, when such differences are viewed as unjust or unfair, and where the groups may be defined socially, economically, demographically, or geographically.



Delivering on Vision Mātauranga

Vision Mātauranga has been identified from the outset as an essential foundation for all research. In keeping with this approach, all research funded by the Challenge will be *required* to demonstrate how it delivers on the policy.

Considering Intergenerational Relationships

Looking at the place of intergenerational relationships in relation to positive ageing was another theme identified through stakeholder consultation, and the Challenge expects that this is considered in the work programmes of each Focus Area.

Taking a Lifecourse Approach

Feedback from stakeholders and researchers consistently emphasised the contribution a lifecourse approach could make towards achieving the Objective. In the next five years, we are seeking to create impact by collaborating on lifecourse research across the three 'health and wellbeing' National Science Challenges (through our Strategic Investment Initiatives, [Section 2.6](#)). In addition, research teams in each Focus Area may consider a lifecourse approach to their research programme, if it is feasible and adds value to the research question.

2.6 Strategic Investment Initiatives


The Challenge recognises the limits to the resource it can direct, and that there is value in working alongside other research funders and consortia, to align research that will make a difference to our Objective. To that end, we have advanced discussions and have every expectation of collaborating and co-funding research, with:

- The other 'health and wellbeing' Challenges (*A Better Start* and *Healthier Lives*)
- *Brain Research New Zealand* (Centre of Research Excellence)
- *Building Better Homes Towns and Cities National Science Challenge*.

Health and Wellbeing Challenges. While we have a clear mandate to undertake research relating to a particular period of the lifespan, there is much to gain from taking a lifecourse perspective. Health and wellbeing outcomes in mid to later life can be viewed as the interaction of biological underpinnings and environmental experiences summed from before birth. There are multiple opportunities across the lifespan to intervene and reduce illness impact, long before treatment of the illness is required.

To this end, the three health and wellbeing National Science Challenges (*Ageing Well*, *Healthier Lives* and *A Better Start*) have agreed to collaborate on a lifecourse research project. The work will capture synergies in considering development and prevention of major illnesses. The work will use the internationally-leading lifecourse research expertise in New Zealand, and our near-unique national-level health and social sector data, available through the Statistics New Zealand Integrated Data Infrastructure.

The three Challenges have agreed to a shared funding pool, and to a joint advisory group that will provide expert opinion on which research will return the most benefit for each of our Objectives. Peer review will be used to provide recommendations to each of the Governance Groups, who must collectively agree on the work to be supported from the shared funding



pool. This collaboration will be initiated through shared ownership and participation in the upcoming symposium “*He ora te whakapiri: Unleashing the potential of New Zealand life course research*” (Te Papa Tongarewa, Wellington, 18 October 2018) ([Section 2.6](#)).

The opportunity is seen as an important element for each of the Challenges individually, but as importantly, it captures shared momentum created by the mission orientation, multi-disciplinary and multi-institutional collaboration, and our emphasis on high quality research. While, conceptually, collaboration might have been possible earlier, the understanding and approaches developed since 2015 suggest that undertaking trans-Challenge research now will be successful.

Brain Research New Zealand (Centre of Research Excellence). Directors of Ageing Well and the CoRE have held regular meetings since 2017 with the goal of identifying a path to advance collaboration on a jointly funded project. The primary research of the CoRE is the ageing brain, which aligns well with Ageing Well’s gazetted theme of brain health. The first stage of collaboration is underway with agreement to provide co-funding of relevant new and innovative projects in 2018, as part of the CoRE’s contestable round. This will be extended with additional dedicated funding over the next five years.


Building Better Houses Towns and Cities (BBHTC). We have identified “*shaping housing, neighbourhoods and transport to maintain autonomy, wellbeing and identity*” as a research priority. Both Ageing Well and BBHTC share interests in this priority, so we intend to support work as a Strategic Investment Initiative in collaboration with BBHTC. A planning meeting with representatives from both entities will be held before the end of 2018.

2.7 *Implementing Vision Mātauranga*

The Challenge has, from the beginning, lived the intent of the Vision Mātauranga policy. The approach has evolved during the first period of the Challenge’s life, and for the 2019-2024 period, we have the confidence to push this further. Our intent is to provide national leadership in this space.

To date, to give life to the policy, we have developed a multi-layered approach, including a combined governance-kahui group, leadership in the Directorate with a deputy director position, Māori leadership of research, supporting Māori research paradigms, Māori researcher career development, and co-design and implementation of research with Māori communities. We created additional emphasis on ageing of Māori (and Pacific peoples) through our previous contestable funding opportunity (2016).

The value derived from our approach to date drives the strategy for the next phase. A renewed round of engagement with a range of Māori stakeholder groups has informed decisions about future strategy, in which one of the two Focus Areas will be Ageing and Māori ([Section 2.4](#)). We will support research in this space that is responsive to Māori and the Vision Mātauranga policy. The Focus Area creates the space for mātauranga (developing and applying Māori knowledge), for using distinctive Māori research paradigms, and for Māori to determine the issues that matter most with respect to ageing. Our work will map to two of the Vision Mātauranga policy’s four themes: hauora/oranga and mātauranga.



In a concrete demonstration of commitment to being responsive to Māori and implementing Vision Mātauranga, the strategy and structure for the next five years means that we expect that as a minimum, half of our investment will be for Māori-centred or kaupapa Māori research.

The Challenge will require that all research, not just the particular and distinctive work with the Ageing and Māori Focus Area, shows how it is responsive to Māori. This is reflected in two of our cross-cutting themes for the next phase of work ([Section 2.5](#)): equitable outcomes for diverse communities, and delivering on Vision Mātauranga.

Our commitment is also reflected in the long-term performance indicators of increasing resilience and wellbeing in older Māori (and Pacific people), alongside the whole population indicators of a reduced proportion of the over 70s requiring subsidised residential care, and a relative reduction in reported disability of individuals aged over 65 years. The Challenge's embodiment of Vision Mātauranga and the emphasis on responsiveness to Māori is seen as a vital component of meeting our performance indicators.


2.8 *Meeting the needs of stakeholders*

The 2018 Colmar Brunton survey demonstrated that, overall, we are meeting the needs of our stakeholders. Stakeholders perceived the Challenge to perform well, especially in stakeholder engagement and relationship building. Stakeholders reported that we were engaging people and keeping them informed, and that the diversity of research projects provided a strong sense of purpose and meaning. The stakeholders considered the Challenge has provided an opportunity to build knowledge networks and share knowledge through relationships that any one stakeholder, or group of stakeholders, could not have formed if it were not for our work.

For the next five-year phase and beyond, our stakeholders want more emphasis on the practical application of the findings, to make a positive difference in the lives of older people. They expressed a desire for the Challenge to educate stakeholders on how to use the research findings. There is a preference for communication of research findings to be in a format that recognises the multiple demands of stakeholder organisations, and can be easily digested and disseminated by them. As a result, we are updating our stakeholder engagement approach and action plan.

We have identified a need to work with the Society of Local Government Managers, and will progress this in 2019. Currently, local governments across New Zealand tend to act independently with respect to policies and activities relating to older people. There is tremendous opportunity for Ageing Well to catalyse a network which coordinates knowledge transfer nationally. We will initiate these links as part of our stakeholder engagement action plan, but we also have a larger and longer term vision for co-ordination across agencies, as described in [Section 7](#).

We have guiding principles that have, and will continue, to shape how we work with stakeholders. These are derived from the Patient Centred Outcomes Research Centre engagement practices (www.pcori.org), were approved by our Governance Group in 2015, and have served to build engagement since the Challenge's inception. These are:

- 
- 1) **Reciprocal Relationships** The roles and decision-making authority of all involved with research, including community members, patients and other stakeholders, are defined collaboratively and clearly stated.

This principle has served us well, for example in developing relationships and collaborative activities with Rauawaawa Kaumātua Charitable Trust and Age Concern New Zealand.

- 2) **Co-Learning** The goal is not to turn stakeholders into researchers, but to help them understand the research process; likewise, the research team will learn about community/stakeholder engagement, and will incorporate older adults and other stakeholders into the research process.

Given the feedback from the Colmar Brunton survey in 2018, we intend to do more to help stakeholders gain a better understanding of the research process and findings. Workshops to address this will be planned at least annually.

- 3) **Partnerships** Time and contributions of stakeholders are valued. Requests for time commitments need to be kept reasonable, and the research team needs to appreciate and be committed to Vision Mātauranga and diversity across all project activities.

The Challenge has strived to ensure relationships are valued by the stakeholders and, although stakeholders reported feeling valued and felt we were committed to Vision Mātauranga, we received feedback from the Colmar Brunton survey that there is a need to acknowledge their limited time and resources. We will ensure that expectations regarding stakeholder's time commitments are agreed upon by all parties and ensure that stakeholders are compensated for their time and effort.

- 4) **Transparency, Honesty, and Trust** Major decisions are made inclusively and information is shared readily with all partners and stakeholders. All parties are committed to open and honest communication with one another.


Our stakeholders appreciate the Challenge's performance with respect to this principle, and our communication and processes will continue to be open and honest.

Co-development and co-delivery are requirements of any research funded by the Challenge and this will continue to be the case. This approach has worked well so far with strong and enduring relationships between stakeholders and the researchers.

We have recognised that engagement requires resources, and have accepted an "engagement budget" as part of research costs, particularly for our Māori stakeholders. This approach will be used in relation to all stakeholders, as our research matures to the stage where much greater involvement with stakeholders is necessary. We will continue to ensure that the work we fund demonstrates engagement.

2.9 *Using connections and accessing resources*

An important element in the development of the strategy has been the wide scale, national-level engagement undertaken by the Challenge over the last three years ([Section 2.1](#)). This has been built around the concept of knowledge exchange partnership to develop ongoing connection and dialogue with stakeholders. These stakeholders have included government ministries, agencies, NGOs, community groups, as well as the research community. While



resource intensive, the engagement has provided the opportunity to leverage capabilities such as local networks and groups for community level outreach activities, including consultation on research priorities and directions for the next five years investment. Another unexpected benefit of such regular engagement is in providing a forum for networking across ministries and agencies during annual Challenge briefing sessions in Wellington (facilitated by MBIE). As we proceed with roll out of our next five year investment plan, building upon and extending our current stakeholder network will be central to our activities.

The Challenge enjoys multiple engagements nationally and internationally through the activities of senior leaders and researchers e.g. collaborations, conference and workshop attendance and roles at the international level. For example, senior Challenge members are involved in the WHO *Guidelines on community-level interventions to manage declines in intrinsic capacity* (Professor Ngaire Kerse), and at national level in the panel for the development of the latest *Positive Ageing Strategy* (Associate Professor Debra Waters).

In leveraging resources in support of its mission, the Challenge is initiating collaborations with research consortia in New Zealand, including other National Science Challenges and the Brain Research New Zealand Centre of Research Excellence as described in [Section 2.6](#). Beyond this, we will continue to engage with stakeholders in joint support of national level events, including sponsorship and support of meetings, and jointly funded conferences and symposia such as our Research Impact Conference (2017) and the planned Lifecourse symposium in 2018 (in collaboration with *A Better Start*, and *Healthier Lives*).

2.10 Alignment of the Challenge strategy

We have considered the alignment of our five year strategy with other current national-level strategies. Of particular relevance is the *New Zealand Health Research Strategy*. With respect to Strategic Priority 1: *invest in excellent health research that addresses the health needs of all New Zealanders*, that *New Zealand Health Research Strategy* notes the increasing diversity and the ageing of our population, identifying the importance of targeting research to meet those needs. We are confident that our strategy for 2019-2024 will make a significant contribution in this area. In particular, we are responding to Action 3 of the *New Zealand Health Research Strategy* Strategic Priority – *investing in research for healthy futures for Māori*. The Challenge also embodies the guiding principles of the *New Zealand Health Research Strategy*, research excellence (as described in [Section 3.](#)) and transparency (as described in [Section 2.8](#)).

Internationally, important directions are signalled through the World Health Organisation's *Global Strategy on Ageing and Health*. WHO's intent is to set the conditions for a *Decade of Healthy Ageing*, from 2020-2030. The Challenge's strategy will contribute to New Zealand's performance towards the *Global Strategy on Ageing and Health*. A key action in the *Global Strategy on Ageing and Health* is to strengthen capacity to formulate evidence-based policy; we consider informing policy development as an important outcome from our work in the next five years. The *Global Strategy on Ageing and Health* also speaks to aligning health systems to the needs of older people and developing age-friendly environments, both of which are reflected in the Challenge's strategy.


3. ACHIEVING EXCELLENCE

The Challenge will build from the approaches developed initially, to continue the trajectory of delivering excellent and impactful research and science. There are six elements to our approach.

- We will use **robust peer review to inform investment decisions and to review research progress**. As previously, we will apply national and international benchmarking through careful selection of expert peer reviewers and assessment panels in making decisions on research investments. We are clear that, while international opinion is important, there is a need to bring in local but independent perspective; while the challenges of an ageing population are not unique to New Zealand, there are certainly elements of the “New Zealand condition” which will be paramount to meaningful solutions and that perspective can only be added through local knowledge.

With respect to assessment of Māori research, our Māori stakeholders and researchers are clear that a balance of international and local expertise is needed, with a key element being the understanding by assessors of indigenous research paradigms.

- A **clear research procurement process** will be an important contributor to excellence for the next five years. As described in [Section 2.2](#), we have identified two Focus Areas for the Challenge’s work and four cross-cutting themes. We will use open tendering to solicit and commission research plans for each of the Focus Areas.
- **Setting expectations for how work will progress** In advance of the call for proposals, we will undertake an extensive briefing so that potential research providers are clear about expectations and process. In particular, we will communicate expectations of collaboration across research providers, and principles of operation for research programmes, that have been developed by the Challenge, with expert input:
 - *Engagement*. Research programmes will include and/or work closely and sustainably with stakeholders and end-users, so they can influence research direction and drive implementation. This includes, but is not limited to, an expectation of significant co-creation of research plans and partnership in research delivery.
 - *Involvement of Māori*. Māori will be involved at all levels, including stakeholder interactions, research leadership, planning and delivery, and knowledge transfer approaches.
 - *Innovation*. Research plans will show innovative, high quality, and potentially transformative research. There is space for high risk/high return work.
 - *Leadership*. Plans will require a recognised leader who will have overall responsibility for the programme, including coordination of activities between collaborators and delivery of the research plan.
 - *Best team*. The research team will have the requisite experience and expertise to deliver the planned research programme. The team will be multi-disciplinary and must be multi-organisational, include stakeholders and/or end users and have national reach.

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- *Coordination and Coherence.* The research programme will have strong coordination, with a coherent plan for research delivery.
 - *Outcome focus.* The research plan will articulate how transformation will be achieved, in relation to the Focus Area outcome statement, and provide a meaningful performance evaluation framework that will be used to provide evidence of progress towards achieving the outcome.
 - *Outcome equity.* The research plan will propose solutions that deliver equity of outcomes for groups, including Māori and Pacific peoples, or make major contributions to addressing existing inequalities.
 - *Research workforce development.* Research programmes will support the acquisition of relevant research skills, including for those working in community settings, when relevant.
- We expect that our research procurement process will bring both the best expertise to the Challenge, and also provide the opportunity for **significant refresh of capability and researchers.**
 - **Sustaining intra-Challenge connections and culture.** The connections between disparate disciplines and institutions engaged in the Challenge’s research provide a peer-support environment that encourages excellence. It has not been straight-forward to develop this culture; it is now greatly valued by the research teams and encourages new ways of thinking and working. The Challenge has supported several opportunities for teams to share perspectives and experiences: coming together to meet the Chair of our International Science Advisory Panel (February 2018), the SNAP event at Te Papa (September 2016), and the “*Realising the Potential*” research impact conference in Dunedin (November 2017), and such opportunities will continue to be created. The next of these will be at “*He ora te whakapiri: Unleashing the potential of New Zealand life course research*”, (October 2018).
 - A final element in our work to create and sustain excellent quality research and science is the Challenge **advisory and governance structures.** We are particularly proud of how our governance has evolved, with a combined governance and Kāhui group, which will continue through the next five years. Similarly, we will continue to use the expertise of our International Science Advisory Panel, not just to advise on research investments, but to help sustain international connections and to contribute insight and experience around implementation issues.

4. THE PATH TO IMPACT

The very nature of a mission-led approach to research shifts emphasis from knowledge creation as the goal for research, to knowledge creation which effects societal change.

Our philosophy, from the outset, has been that stakeholders are integral to the Challenge achieving its Objective. This philosophy has determined our emphasis on stakeholder relationships, on co-creation of research programmes, and on the nature of knowledge exchange activities. This will continue into the next five years, as can already be seen through the consultation we have used to inform the Challenge research strategy.

We will work alongside stakeholders, to share the task of identifying questions that matter to both the research community and the end-users, and to undertake research in a manner than creates knowledge, processes and products that our end-users can take up and apply (Figure 3). The Challenge will undertake research which includes research on implementation issues, but it is our end-users – the non-governmental and community organisations, the local government agencies and service providers, the policy developers and Ministries - who are positioned to act on our research outputs.

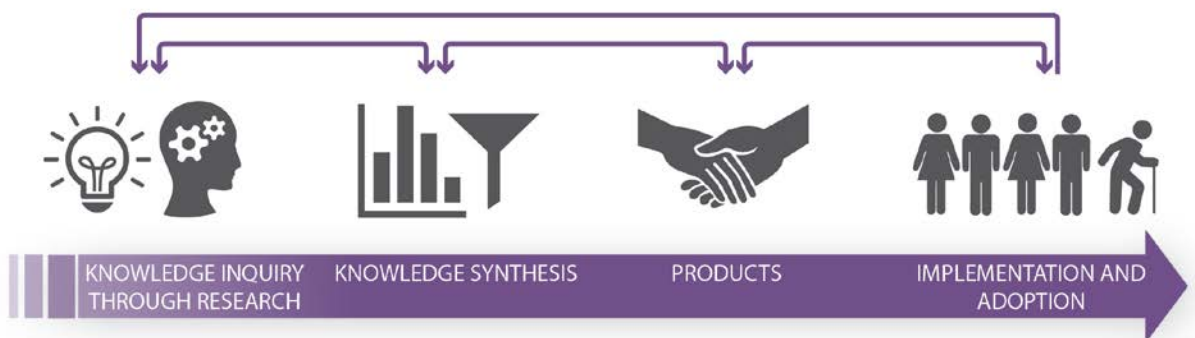



Figure 3 The knowledge to action progression.

Our next five year strategy will also deliver what are likely to be lasting changes in research behaviour and environment. We expect that the Challenge will leave a legacy of awareness of the importance of partnering, collaboration and cross-disciplinary research.

Beyond the creation and synthesis of knowledge, and uptake of processes and products that will be derived from the Challenge, we are positioned to exert broader influence. This is based on Challenge researchers being recognised as experts and thought leaders. As already signalled ([Section 2.9](#)), members of the Challenge are involved with a range of advisory and working groups:

- World Health Organisation
- International Association of Geriatrics and Gerontology, (and as part of that organization, the Global Ageing Research Network)
- The panel developing the Positive Ageing Strategy
- Age Concern New Zealand
- Accident Compensation Corporation
- Health Quality and Safety Commission

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- New Zealand Association of Gerontology
 - Australian and New Zealand Society for Geriatric Medicine
 - Australian Association of Gerontology

The Ageing and Māori Focus Area has created the impetus for significant change. Very little research in Māori ageing is currently conducted. To achieve impact, research will be imbued by a holistic, rather than reductionist, ethos, with research contributing to creation of Māori knowledge, translation into Māori gains, incorporating Māori research and ethics processes, contributing to building the Māori research workforce, and responding to the needs of, and working in partnership with, Māori stakeholders and communities.

Ongoing and future engagement with Māori organisations is critical to help the Challenge to meet its Objective. Importantly it will help to ensure that we remain responsive to the needs and aspirations of Māori and to Te Tiriti o Waitangi, and remain consistent with Vision Mātauranga. An important part of this ongoing work is the collaborative approach being developed by Māori directors across the 11 National Science Challenges and particularly with *Healthier Lives* and *A Better Start*. Future engagement in 2018 will include the Whānau Ora Partnership Group and the Data Leadership Group (Iwi Chairs Forum) and key Māori research organisations such as Ngā Pae o te Māramatanga.

Based on feedback from Māori engagement, we intend to support a conference in late 2018 with kaumātua service providers, researchers, policy makers, Iwi and urban Māori groups, and older Māori. This hui will facilitate sharing of past research findings and development of new collaborations between researchers, community and providers, and provide the opportunity to put together research plans for the next five years.

5. DECISION MAKING AND ACCOUNTABILITY

Responsibility for decision making and accountabilities are defined in the Challenge Collaboration Agreement between the nine Collaborating Parties, with University of Otago as the host. Over the last 18 months, the Challenge has instigated significant changes in its leadership structures and processes around decision making. These changes have included:

- The restructuring of the Governance and Kahui Groups into a single co-governance model
- Restructuring of the Directorate to include the appointment of a Deputy Director (Māori)
- Refresh of the Strategic Advisory Group (formerly named the Science Leadership Team) with a redefinition of its role as primarily an advisory group
- Refresh of the International Science Advisory Panel, with appointment of a Chair and Deputy Chair

These changes have been successfully embedded, in preparation for the next five years, and no further changes are anticipated going forward.

The Challenge organisational structure is shown in Figure 4.

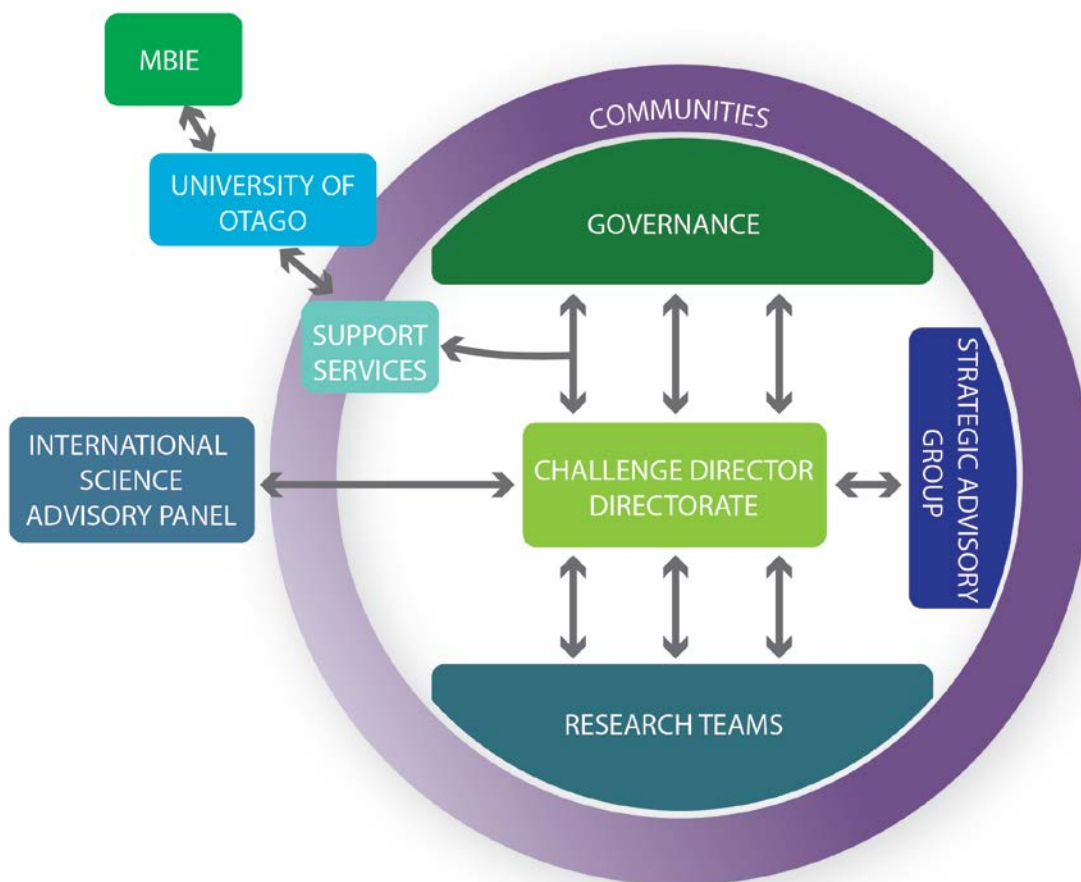


Figure 4 Ageing Well Organisational Structure.

6. INDICATIVE BUDGET

The following is an indicative budget for the five year strategy, indicating the distribution of funds to research, governance and management.

<i>NSC Ageing Well</i> <i>ALL 1 July to 30 June Years (assuming \$4.06M pa)</i>	Yr1	Yr2	Yr3	Yr4	Yr5	TOTAL
Focus Area: Health and Wellbeing (including Emergent Opportunities)	1,400	1,400	1,400	1,400	1,400	7,000
Focus Area: Ageing and Māori (including Emergent Opportunities)	1,400	1,400	1,400	1,400	1,400	7,000
Strategic Investment Initiatives	400	400	400	400	400	2,000
Science advisory and Leadership	393	393	393	394	394	1,967
Communications and Outreach	172	172	172	172	172	860
Governance and Advisory	68	69	69	69	69	344
Management and Administration	225	226	226	226	226	1,129
TOTAL:	4,060	4,060	4,060	4,060	4,060	* 20,300

**In thousands*

Table 1 Ageing Well National Science Challenge Indicative Budget 2019-2014

The budget provides for three specific research investments; the two Focus Areas and Strategic Investment Initiatives.

Within each of the Focus Area budget envelopes, approximately \$5 million will fund a multidisciplinary, multi-institutional team of researchers to undertake a 5-year programme of research, and \$2 million will be allocated to emergent opportunities.

7. SCENARIO PLANNING

The greatest impact the Challenge could achieve, beyond delivery from the planned work programmes, relates to development and sharing of knowledge that local government agencies need for their planning and delivery of health and wellbeing services for older persons. In large part this is likely to be implementation research, around how to adapt policies and programmes for local environments, accompanied by assessment of cost-effectiveness and impact. At present, there is little coordination around policy and services for older people across New Zealand's 78 local, regional, and unitary councils. There are also varying degrees of expertise. Recent, and preliminary, discussions with some local government agencies have highlighted the value they see in the Challenge as an expert research provider, in undertaking knowledge synthesis, and in working with the agencies to provide implementation solutions.

Our experience is that, when approached, local government agencies are very open to engaging with research but largely lack the experience and capacity (particularly in respect of expertise and engagement). We see that the Challenge could contribute:

- The expertise and mana to lead the initial discussions across local government agencies, to develop shared research agendas and priorities.
- Resource and expertise in setting up sustainable networking mechanisms, that will support shared research, and be instrumental in knowledge exchange.
- The coordination of, and capability to undertake, a number of "demonstration" implementation research projects.

We see that a few successful projects will increase the buy-in to the collaboration network from local government agencies and support a culture of knowledge sharing and cooperation. Initially, we would plan to fund the projects, with the expectation that once the value of the network and the approach had been demonstrated, that agencies would be willing to buy the services.

In the longer term, the outcomes from establishing the network and completing implementation research projects will be:

- More widespread appreciation of the need for research in creating an evidence base for policy and programmes
- A greater research capacity amongst local government agencies themselves
- Closer relationships between organisations with expertise in older persons research and local government agencies that are involved in planning local policy and services for older people
- A self-sustaining network of people within local government who plan and deliver services for older people.

Within twelve months the Challenge can establish the network and be undertaking research prioritisation with the engaged local government agencies. Within three years, the Challenge will be leading the platform for implementation science research initiatives, providing a one stop shop to facilitate testing of innovations (from local policy to services), to evaluate outcomes, and to share good practice. The effectiveness and utility of the network would be evaluated using a quality improvement research design, based on a whole systems approach,




comparing processes and outcomes before and after the establishment of the network, on an agency-by-agency basis.

In the spirit of the research philosophy being championed by the Challenge, we would expect any research to be developed and carried out through co-creation, and so it is not possible to define the particular research questions in advance.

8. GLOSSARY OF TERMS

Accident Compensation Corporation	The New Zealand government agency responsible for administering the country's universal no-fault accidental injury scheme.
Age Concern	A nationwide charitable organisation dedicated to people over 65, promoting dignity, wellbeing, equity and respect, and which provides expert information and support services.
Ageing and Māori	One of two Focus Areas signalled in the Ageing Well National Science Challenge Future Strategy for 2019-2024.
Centres of Research Excellence	Inter-institutional research networks, with researchers working together on commonly agreed work programmes, funded through the Tertiary Education Commission.
Cross-cutting themes	Considerations of fundamental importance for all Challenge research.
District Health Boards	Twenty organisations established by the New Zealand Public Health and Disability Act 2000, responsible for ensuring the provision of health and disability services to populations within a defined geographical area.
Emergent opportunities	Ideas that can be supported by the Challenge in addition, but complementary, to the major Challenge-funded research programmes. This allows the Challenge to respond to new ideas and opportunities as they arise, rather than relying only on fixed five year workplans.
Focus Area	An area in which the Challenge has determined that work supported by it could deliver significant research outcomes, relative to the Objective, in 2019-2024. A Focus Area is relatively broad, but within it the Challenge has identified a small number of research priorities.
Hauora	To be fit, well, healthy, vigorous, in good spirits.
Health and Wellbeing in Ageing	One of two Focus Areas signalled in the Ageing Well National Science Challenge Future Strategy for 2019-2024.
Health Quality and Safety Commission	A New Zealand government agency responsible for assisting providers across the whole health and disability sector to improve service safety and quality.
Hui	A gathering, meeting, conference.
Integrated Data Infrastructure	A large research database containing person-centred data from a range of government agencies, Statistics NZ surveys, and non-government organisations. IDI is managed by Statistics NZ.
Iwi	Tribe or extended kinship group. The word often refers to a large group of people descended from a common ancestor and associated with a distinct territory.
Kāhui	Group, often involved advisory or decision making.



Kaumātua	Elders in Māori society, who are held in high esteem.
Kaupapa Māori research	Research that is undertaken by Māori, with Māori and for Māori. It is based in tikanga Māori, or Māori ways of doing things.
<i>Kia eke kairangi ki te taikaumātutanga</i>	Literally, achieving the best for older people. The te reo Māori title for the Ageing Well National Science Challenge.
Māori centred research	Research that involves Māori at all levels, and employing both Māori and non-Māori methods and analytical approaches.
Mātauranga	Wisdom, or knowledge.
Objective	The officially mandated objective of the Challenge, as announced in the New Zealand Gazette 31 January 2014. The Objective for Ageing Well is “to harness science to sustain health and wellbeing into the later years of life”.
Oranga	Welfare, health, living.
Positive Ageing Strategy	A strategy of New Zealand’s Ministry of Social Development, which is currently being reviewed.
Research Priorities	Defined topics for research, within a Focus Area, that the Challenge will fund under the strategy for 2019-2024.
Social Policy Research and Evaluation Unit	A government agency that focuses on what works to improve the lives of families, children and whānau.
Strategic Investment Initiatives	Research opportunities, involving collaboration with other research consortia or funders, that the Challenge will develop under the 2019-2024 strategy, to complement work in the Focus Areas.
Te Papa Tongarewa	The Museum of New Zealand, based in Wellington.
Te Tiriti o Waitangi	The Treaty of Waitangi, New Zealand’s founding document.
Vision Mātauranga	A policy of the Ministry of Business, Innovation and Employment that unlocks the science and innovation potential of Māori knowledge, resources and people. The policy applies to all science sector priority investment areas, including the National Science Challenges.
Whānau	Family, or more broadly, an extended family or community of related families who live together in the same area.
Whānau Ora Partnership Group	A forum of ministerial and iwi representatives guiding the Whānau Ora policy which places whānau and families at the centre of service delivery, and requires the integration of services like health, education and social services.



9. LIST OF ABBREVIATIONS

CoRE	Centre of Research Excellence
MBIE	Ministry of Business, Innovation and Employment
NGO	Non-governmental organisation
NSC	National Science Challenge
SNAP	Stakeholder Network for Action Partnerships
WHO	World Health Organisation