

# Clan Matheson New Zealand

## Strategic goals and actions 2023 –2024

The trustees and committee members of Clan Matheson New Zealand work together to plan our direction and activities. Our goals for the next five years and actions planned for this year are set out here. We'd welcome your feedback on these, and any suggestions you have for Clan Matheson New Zealand. Email [chair@clanmatheson.org.nz](mailto:chair@clanmatheson.org.nz) and [trust@clanmatheson.org.nz](mailto:trust@clanmatheson.org.nz).

Five-year goals		
Foster an interest in Matheson Heritage	Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries	Help people with Matheson heritage find out more about their family history and stories
<ul style="list-style-type: none"> <li>• Regular newsletter is in an easily accessible and responsive electronic form</li> <li>• More integration of content between the newsletter and website</li> <li>• An annual newsletter is available in hard copy at events</li> <li>• Past information is easily accessible</li> </ul>	<ul style="list-style-type: none"> <li>• Clan Matheson New Zealand has an increasingly professional and effective presence at identified events</li> <li>• Wide range of Mathesons take opportunities for gathering including face-to-face and virtually</li> </ul>	<ul style="list-style-type: none"> <li>• Quality support for research into heritage and family history and publication provided through the website, newsletter, newsletter, Facebook group and gatherings</li> </ul>
<ul style="list-style-type: none"> <li>• Succession process is used for committee and trust board</li> </ul>	<ul style="list-style-type: none"> <li>• Chief visits New Zealand</li> </ul>	<ul style="list-style-type: none"> <li>• Improved family history services at clan tent</li> </ul>
<ul style="list-style-type: none"> <li>• Trust is financially stable and able to fund planned activities</li> </ul>	<ul style="list-style-type: none"> <li>• Clan Matheson New Zealand links people to active clans and Scottish organisations</li> </ul>	

Foster an interest in Matheson heritage			
Charitable purpose and objectives	2023–2024 outcomes (what we want to achieve)	2023–2024 activities (what we plan to achieve this)	Evidence of progress (how we'll know what we've achieved)
(a) protect, preserve, enhance and promote the history and heritage of Clan Matheson for the educational and recreational benefit of the public	<ul style="list-style-type: none"> <li>• Committee with mix of skills needed to support trust appointed</li> </ul>	<ul style="list-style-type: none"> <li>• Identify potential committee members with: <ul style="list-style-type: none"> <li>○ -expertise in raising funds to support charitable purpose</li> <li>○ -knowledge of Matheson heritage</li> </ul> </li> <li>• Continue support of clan piper</li> </ul>	<ul style="list-style-type: none"> <li>• New committee members identified</li> <li>• Opportunities to involve clan piper identified</li> </ul>
(d) record, publish and otherwise disseminate the heritage, history and culture of Clan Matheson	<ul style="list-style-type: none"> <li>• Better connection to international Clan Matheson Society</li> </ul>	<ul style="list-style-type: none"> <li>• Include regular links to international Clan Matheson Society material</li> </ul>	<ul style="list-style-type: none"> <li>• Newsletter and website include links</li> </ul>
(f) Provide continuance of interests in perpetuity for the non-incorporated group originally established as the New Zealand branch of the Clan Matheson Society.	<ul style="list-style-type: none"> <li>• Those interested are confident in the strength of the branch</li> <li>• Procedures implemented to meet legal requirements (e.g. reporting)</li> </ul>	<ul style="list-style-type: none"> <li>• Good evidence about the quality of legal status and of any activities help develop confidence</li> <li>• Trustees to determine what will meet their needs for legal requirements</li> <li>• Committee to develop drafts</li> <li>• Trustees and committee to develop respective succession planning principles</li> <li>• Finalise and print promotional brochure</li> </ul>	<ul style="list-style-type: none"> <li>• Administrative/legal/reporting processes developed</li> <li>• Succession plans developed</li> <li>• Promotional brochure in use</li> </ul>

Charitable purpose and objectives	2023–2024 outcomes (what we want to achieve)	2023–2024 activities (what we plan to achieve this)	Evidence of progress (how we'll know what we've achieved)
(g) Establish, maintain and administer a fund of money for the use of the trust.	<ul style="list-style-type: none"> <li>• Donation system to be available on website</li> <li>• Fund-raising opportunities identified</li> </ul>	<ul style="list-style-type: none"> <li>• Set up system to meet IRD requirements</li> <li>• Identify community grants to support activities that relate to charitable purpose</li> <li>• Committee uses expert advice to access revenue from advertising and sponsorship</li> </ul>	<ul style="list-style-type: none"> <li>• Donation receipts can be issued with little administrative input</li> <li>• Plan developed of activities requiring funding and corresponding potential funding sources</li> </ul>

**Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries**

<b>Charitable purpose and objectives</b>	<b>2023–2024 outcomes (what we want to achieve)</b>	<b>2023–2024 activities (what we plan to achieve this)</b>	<b>Evidence of progress (how we'll know what we've achieved)</b>
(e) Promote fellowship and awareness of kinship between all present day descendants of Clan Matheson.	<ul style="list-style-type: none"> <li>• Mathesons meet during gatherings</li> <li>• information available</li> <li>• opportunities to contribute to clan planning</li> <li>• individuals invited to support clan work</li> </ul>	<ul style="list-style-type: none"> <li>• Gatherings of Mathesons planned</li> <li>• Ways to encourage attendance identified</li> <li>• Invitation in newsletter on Facebook and website</li> <li>• Matheson involvement supported:               <ul style="list-style-type: none"> <li>○ -banners, brochure, laptop, screen</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Increasing interest/attendance at tent</li> <li>• Awareness of international gathering (we can't predict or ensure attendance)</li> </ul>
(h) Work collaboratively with the Clan Matheson Society and its branches anywhere in the world.	<ul style="list-style-type: none"> <li>• Potential for an international exchange scheme like Clan Cameron considered</li> <li>• Interested New Zealanders are aware of 2024 international gathering</li> </ul>	<ul style="list-style-type: none"> <li>• Subgroup to investigate possible exchange scheme</li> <li>• Promote New Zealand participation in 2024 international gathering through our communication channels</li> </ul>	<ul style="list-style-type: none"> <li>• Feasibility study completed on exchange scheme</li> <li>• 2024 international gathering promoted in all our communication channels</li> </ul>
(i) Work collaboratively with other Scottish clan organisations, Caledonian and Highland game societies and family history organisations, to further the objects of the trust.	<ul style="list-style-type: none"> <li>• Enhanced links with other Scottish organisations in New Zealand</li> </ul>	<ul style="list-style-type: none"> <li>• Identify more clan and other Scottish organisations to send newsletter to</li> <li>• Invite other organisations' representatives to our gatherings where agreed</li> </ul>	<ul style="list-style-type: none"> <li>• Increased number of clan and other Scottish organisations in New Zealand receiving the newsletter</li> </ul>

<b>Help people with Matheson heritage find out more about their family history and family stories</b>			
<b>Charitable purpose and objectives</b>	<b>2023–2024 outcomes (what we want to achieve)</b>	<b>2023–2024 activities (what we plan to achieve this)</b>	<b>Evidence of progress (how we'll know what we've achieved)</b>
(b) encourage and support research, investigation and preservation of Scottish heritage, history and culture, particularly as it relates to Clan Matheson in Scotland and wherever in the world descendants have migrated.	<ul style="list-style-type: none"> <li>• Communications; website, Facebook, newsletter and clan activities are of quality that will generate sponsorship</li> </ul>	<ul style="list-style-type: none"> <li>• Provide professional support as needed for website maintenance and development</li> <li>• Investigate (or promote) adoption in New Zealand of the Clan Matheson march</li> <li>• Continue to promote the grant scheme, aiming for diversity of ideas</li> </ul>	<ul style="list-style-type: none"> <li>• Website functioning with few outages or errors</li> <li>• Agreement about music for Clan Matheson New Zealand</li> <li>• Grant scheme is publicised, and applications are received</li> </ul>
(c) Encourage and support the study of genealogy, family history and personal heritage through promotion, information-sharing, training and preservation of material in oral, written or any other form.	<ul style="list-style-type: none"> <li>• Readers given resources to help with their own family history investigations</li> <li>• Development of family history content of website</li> </ul>	<ul style="list-style-type: none"> <li>• Continue family history discussion and resources and 'younger person' columns in newsletter, website and Facebook group</li> </ul>	<ul style="list-style-type: none"> <li>• Family history guides and resources are further developed and website is an information repository</li> </ul>

The charitable purposes and objectives are of the Clan Matheson New Zealand charitable trust.