

Clan Matheson Focus areas and charitable purpose and objectives

Focus areas	Charitable purpose and objects
<p>Foster an interest in Matheson Heritage</p>	(a) protect, preserve, enhance and promote the history and heritage of Clan Matheson for the educational and recreational benefit of the public
	(d) record, publish and otherwise disseminate the heritage, history and culture of Clan Matheson
	(f) Provide continuance of interests in perpetuity for the non-incorporated group originally established as the New Zealand branch of the Clan Matheson Society.
	(g) Establish, maintain, and administer a fund of money for the use of the trust.
<p>Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries</p>	(e) Promote fellowship and awareness of kinship between all present-day descendants of Clan Matheson.
	(h) Work collaboratively with the Clan Matheson Society and its branches anywhere in the world.
	(i) Work collaboratively with other Scottish clan organisations, Caledonian and Highland game societies and family history organisations, to further the objects of the trust
<p>Help people with Matheson heritage find out more about their family history and stories</p>	(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.
	(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.

Clan Matheson New Zealand 5-year strategic goals 2023-2024

Focus areas	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
5-year strategic goals	<ul style="list-style-type: none"> Regular newsletter is in an easily accessible and responsive electronic form All material for the newsletter is drawn from website content An annual newsletter is available in hard copy at events Past information is easily accessible 	<ul style="list-style-type: none"> Clan Matheson New Zealand has an increasingly professional and effective presence at identified events Wide range of Mathesons take opportunities for gathering including face-to-face and virtually 	<ul style="list-style-type: none"> Quality support research into heritage and family history and for publication provided through the website, newsletter, newsletter, Facebook group and gatherings
	<ul style="list-style-type: none"> Succession process is used for committee and trust board 	<ul style="list-style-type: none"> Chief visits New Zealand 	<ul style="list-style-type: none"> Improved family history services at clan tent
	<ul style="list-style-type: none"> Trust is financially stable and able to fund planned activities 	<ul style="list-style-type: none"> Clan Matheson New Zealand links people to active clans and Scottish organisations 	

Clan Matheson New Zealand outcomes, activities, and evidence 2023-2024

Completed

Underway

Not continuing at this time

Focus areas	2023 – 2024 outcomes (what we want to achieve)	2023 –2024 activities (what we plan to do to achieve this)	Evidence of progress
Foster an interest in Matheson Heritage	<ul style="list-style-type: none"> Committee with mix of skills needed to support trust appointed 	<ul style="list-style-type: none"> Identify potential committee members with: <ul style="list-style-type: none"> -expertise in raising funds to support charitable purpose -knowledge of Matheson heritage 	<ul style="list-style-type: none"> New committee members identified
		<ul style="list-style-type: none"> Continue support of clan piper 	<ul style="list-style-type: none"> Opportunities to involve clan piper identified
	<ul style="list-style-type: none"> Better connection to international Clan Matheson Society 	<ul style="list-style-type: none"> Include regular links to international Clan Matheson Society material 	<ul style="list-style-type: none"> Newsletter and website include links
	<ul style="list-style-type: none"> Those interested are confident in the strength of the branch 	<ul style="list-style-type: none"> Good evidence about the quality of legal status and of any activities help develop confidence 	<ul style="list-style-type: none"> Administrative/legal/reporting processes developed
	<ul style="list-style-type: none"> Procedures implemented to meet legal requirements (e.g. reporting) 	<ul style="list-style-type: none"> Trustees to determine what will meet their needs for legal requirements 	<ul style="list-style-type: none"> Reporting format for Charities Services used
		<ul style="list-style-type: none"> Committee to develop drafts 	<ul style="list-style-type: none"> Committee adopts financial reports annually committee and trustees report in a record of actions
		<ul style="list-style-type: none"> Trustees and committee to develop respective succession planning principles 	<ul style="list-style-type: none"> Succession plans developed
		<ul style="list-style-type: none"> Finalise and print promotional brochure 	<ul style="list-style-type: none"> Promotional brochure in use
	<ul style="list-style-type: none"> Donation system to be available on website 	<ul style="list-style-type: none"> Set up system to meet IRD requirements 	<ul style="list-style-type: none"> Donation receipts can be issued with little administrative input
	<ul style="list-style-type: none"> Fund-raising opportunities identified 	<ul style="list-style-type: none"> Identify community grants to support activities that relate to charitable purpose. 	<ul style="list-style-type: none"> Plan developed of activities requiring funding and corresponding potential funding sources
	<ul style="list-style-type: none"> Committee uses expert advice to access revenue from advertising and sponsorship 		

Focus areas	2023 – 2024 outcomes (what we want to achieve)	2023 –2024 activities (what we plan to do to achieve this)	Evidence of progress
Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries	<ul style="list-style-type: none"> Mathesons meet during gatherings 	<ul style="list-style-type: none"> Gatherings of Mathesons planned Ways to encourage attendance identified 	<ul style="list-style-type: none"> Increasing interest/attendance at tent
	<ul style="list-style-type: none"> information available 	<ul style="list-style-type: none"> Matheson involvement supported: -banners, brochure, laptop, screen 	
	<ul style="list-style-type: none"> opportunities to contribute to clan planning 	<ul style="list-style-type: none"> Invitation in newsletter on Facebook and website and at clan tent 	
	<ul style="list-style-type: none"> individuals invited to support clan work 	<ul style="list-style-type: none"> Invitation in newsletter on Facebook and website 	
	<ul style="list-style-type: none"> Potential for an international exchange scheme like Clan Cameron considered 	<ul style="list-style-type: none"> Subgroup to investigate possible exchange scheme 	<ul style="list-style-type: none"> Feasibility study completed on exchange scheme
	<ul style="list-style-type: none"> Interested New Zealanders are aware of 2024 international gathering 	<ul style="list-style-type: none"> Promote New Zealand participation in 2024 international gathering through our communication channels 	<ul style="list-style-type: none"> Awareness of international gathering (we can't predict or ensure attendance) 2024 international gathering promoted in all our communication channels
	<ul style="list-style-type: none"> Enhanced links with other Scottish organisations in New Zealand 	<ul style="list-style-type: none"> Identify more clan and other Scottish organisations to send newsletter to. <p>Invite other organisations' representatives to our gatherings where agreed</p>	<ul style="list-style-type: none"> Increased number of clan and other Scottish organisations in New Zealand receiving the newsletter

Focus areas	2023 – 2024 outcomes (what we want to achieve)	2023 –2024 activities (what we plan to do to achieve this)	Evidence of progress
<p style="text-align: center;">Help people with Matheson heritage find out more about their family history and stories</p>	<ul style="list-style-type: none"> Communications; website, Facebook, newsletter and clan activities are of quality that will generate sponsorship 	<ul style="list-style-type: none"> Provide professional support as needed for website maintenance and development 	<ul style="list-style-type: none"> Website functioning with few outages or errors
		<ul style="list-style-type: none"> Investigate (or promote) adoption in New Zealand of the Clan Matheson march 	<ul style="list-style-type: none"> Agreement about music for Clan Matheson New Zealand
	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Continue to promote the grant scheme, aiming for diversity of ideas 	<ul style="list-style-type: none"> Grant scheme is publicised, and applications are received
	<ul style="list-style-type: none"> Readers given resources to help with their own family history investigations Development of family history content of website 	<ul style="list-style-type: none"> Continue family history discussion and resources and ‘younger person’ columns in newsletter, website and Facebook group 	<ul style="list-style-type: none"> Family history guides and resources are further developed and website is an information repository