

Clan Matheson New Zealand Strategic and Annual Plan June 2024

Clan Matheson Focus areas and charitable purpose and objectives

Focus areas	Charitable purpose and objects
Foster an interest in Matheson Heritage	(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.
Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries	(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
Help people with Matheson heritage find out more about their family history and stories	(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 2024–2025

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, evidence 2024–2025

Focus areas	2024 – 2025 outcomes (what we want to achieve)	2024 – 2025 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 members and trustees with mix of skills needed to support trust are 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 and support for Matheson heritage 	<ul style="list-style-type: none"> New committee members identified. More Mathesons engage with the clan. More Mathesons involved in clan activities.
		<ul style="list-style-type: none"> Invite Mathesons to contribute through: <ul style="list-style-type: none"> -digital media, virtual meetings, newsletter, contacting people we know. 	
		<ul style="list-style-type: none"> Trustees and committee to develop respective succession plans including principles and actions to 	
	<ul style="list-style-type: none"> Individuals invited to support clan work 	<ul style="list-style-type: none"> Invitation in newsletter and on Facebook and at tent <ul style="list-style-type: none"> -support at local level - share expertise in family history research 	<ul style="list-style-type: none"> Individuals support clan work.
	<ul style="list-style-type: none"> Those interested are confident in the strength of the branch 	<ul style="list-style-type: none"> Website includes details of legal status and branch activities 	<ul style="list-style-type: none"> Information available Any queries responded to quickly
	<ul style="list-style-type: none"> Procedures implemented to meet legal requirements. 	<ul style="list-style-type: none"> Annual cycle of Trust and committee planning and reporting of activities and finances is documented and implemented 	<ul style="list-style-type: none"> Documents developed and available on website.
	<ul style="list-style-type: none"> High quality financial reporting in place 	<ul style="list-style-type: none"> Reports on cashflow, statement of financial position, statement of debits and credits provided to committee 	<ul style="list-style-type: none"> Trust and committee use reports financial position and activities
		<ul style="list-style-type: none"> Update print promotional brochure including references to grant and donations 	<ul style="list-style-type: none"> Promotional brochure in use
	<ul style="list-style-type: none"> Sponsor agrees to meet ongoing costs for two years 	<ul style="list-style-type: none"> Plan for sourcing sponsor support implemented. 	<ul style="list-style-type: none"> Clan ongoing costs are met
<ul style="list-style-type: none"> Further fundraising opportunities identified 	<ul style="list-style-type: none"> Committee identifies activities that create a need for further fundraising 	<ul style="list-style-type: none"> Activities that support clan purposes and objectives are identifies 	

Focus areas	2024 – 2025 outcomes (what we want to achieve)	2024 – 2025 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 continue to meet at clan tent 	<ul style="list-style-type: none"> Matheson involvement supported: <ul style="list-style-type: none"> Experts in local Mathson history identified and supported 	<ul style="list-style-type: none"> Committee has knowledge and understanding of local Mathesons
		<ul style="list-style-type: none"> Invitations to events are in newsletter on Facebook and website 	<ul style="list-style-type: none"> Events are up to date
	<ul style="list-style-type: none"> Matheson tent at National Pipe Band Championships (NPBC) clan alley in the future 	<ul style="list-style-type: none"> Support ongoing Matheson participation at National NPBC clan alley 	<ul style="list-style-type: none"> Clan Matheson tent at NPBC in Invercargill
		<ul style="list-style-type: none"> Develop a record of standard procedures, resources and activities that can be shared with clans and Scottish organisations in the areas where NPBC are being held 	<ul style="list-style-type: none"> Standard procedures documented NPBC welcomes clan alley Local clans' representatives support the clan alley
	<ul style="list-style-type: none"> Interest in Clan Matheson New Zealand increased as a result of Chief's visit 	<ul style="list-style-type: none"> Chief's visit planned for his interests and opportunities to meet Mathesons across the country Mathesons invited to meet together and to meet the Chief 	<ul style="list-style-type: none"> Visit plans confirmed Mathesons gather at agreed venues
	<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. 	<ul style="list-style-type: none"> Increased number of clan and other Scottish organisations in New Zealand receiving the newsletter
	<ul style="list-style-type: none"> Better connection to international Clan Matheson Society 	<ul style="list-style-type: none"> Identify opportunities to strengthen connections as a result of attending International Gathering 	<ul style="list-style-type: none"> Links to Scotland/Other branches established Matheson March highlighted
		<ul style="list-style-type: none"> Order 25 chief's special edition badges for the international gathering 	<ul style="list-style-type: none"> Mathesons purchase special badges

Focus areas	2024 – 2025 outcomes (what we want to achieve)	2024 – 2025 activities (what we plan to do to achieve this)	Evidence of progress
Help people with Matheson heritage find out more about their family history and stories	<ul style="list-style-type: none"> Communications; website, Facebook, newsletter and clan activities are of high quality that keeps interest growing 	<ul style="list-style-type: none"> Continue to review communications and respond to suggestions 	<ul style="list-style-type: none"> Numbers accessing each communication show steady or increasing use
		<ul style="list-style-type: none"> Encourage and solicit input and engagement in Facebook and the newsletter 	<ul style="list-style-type: none"> Ways of increasing engagement identified
	<ul style="list-style-type: none"> Readers given resources to help with their own family history investigations. 	<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"> New material is included
	<ul style="list-style-type: none"> Family History guides and resources are used to research family history 	<ul style="list-style-type: none"> Promote use of family stories and history resources at clan tent Identify ways of engaging visitors to tent in further use of resources 	<ul style="list-style-type: none"> More clan family stories and history resources are available at the tent Visitors use resources at the tent (possible?)
		<ul style="list-style-type: none"> Investigate use of digital media at clan tent to support people with an interest in Matheson heritage to use family stories and history resources Identify local experts in use of digital resources 	<ul style="list-style-type: none"> Visitors to tent use digital media to research family stories and history
		<ul style="list-style-type: none"> Identify opportunities for virtual gatherings to support use of family history resources 	<ul style="list-style-type: none"> Opportunities and resources needed considered by committee