

Strategic plan 2025–2029 and annual plan to June 2026

Clan Matheson focus areas and charitable purpose and objects

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 2025–2029

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 suitable material from the newsletter is published on the website. 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 for research into heritage and family history 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"> Maximise the opportunities that result from the chief's visit. 	<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 annual plan: outcomes, activities, evidence

2025–2026

Focus areas		2025–2026 outcomes (what we want to achieve)	2025–2026 activities (what we plan to do to achieve this)	Evidence of progress
Foster an interest in Matheson heritage	branch	<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"> Develop ways to 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 Process for inviting committee members developed Trustees and committee develop respective succession plans including principles and actions 	<ul style="list-style-type: none"> Potential committee members identified. More Mathesons involved in clan activities.
		<ul style="list-style-type: none"> Individuals invited to support clan work 	<ul style="list-style-type: none"> Make opportunities available for Mathesons who are willing to carry out specific tasks or functions and perhaps committee involvement <ul style="list-style-type: none"> - Ideas for tasks and functions identified - Circulate including by a handout at tent and other events 	<ul style="list-style-type: none"> Individuals support clan work.
		<ul style="list-style-type: none"> Shared central document storage is utilised 	<ul style="list-style-type: none"> Clan officials store documents in the central storage location 	<ul style="list-style-type: none"> Clan documents are available in a central storage
	finance	<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 identified

Focus areas		2025–2026 outcomes (what we want to achieve)	2025–2026 activities (what we plan to do to achieve this)	Evidence of progress
<p>Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries</p>	<p>Strengthening relationships</p>	<ul style="list-style-type: none"> Mathesons continue to meet at clan tent for fellowship and information Clan Matheson tent is present at Highland games and pipe band events If feasible, a small Matheson badge is available to Mathesons Mathesons have quality succinct information Matheson tent at National Pipe Band Championships (NPBC) clan avenue in the future 	<ul style="list-style-type: none"> Matheson involvement supported: <ul style="list-style-type: none"> Mathesons interested in local Matheson history identified and supported to be involved in tent and other events Clan tent at: <ul style="list-style-type: none"> Hororata, Waipu, Turakina, Paeroa Other events where Mathesons may gather Investigate developing a small colourful badge <ul style="list-style-type: none"> Matheson demand makes sales possible Financially viable Consult with chief Update print promotional brochure removing reference to grant and changing the reference to donations Support ongoing Matheson participation at National NPBC clan avenue Support organisers to establish a clan avenue of clans and Scottish organisations <ul style="list-style-type: none"> Identify a clan based in Taranaki to link to the local pipe band association and to support set up of the avenue 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"> Committee has the knowledge and understanding of local Mathesons to enable involvement in activities Clan tent at: <ul style="list-style-type: none"> the four Highland games events National pipe band championships A decision is made on whether it is practicable and affordable to make a small unique Matheson badge available Up to date promotional brochure in use Clan Matheson tent at NPBC in Inglewood Clan avenue of several clans and organisations Clan avenue site supports easy access to clan tents Standard procedures documented NPBC welcomes clan avenue Local clans' representatives support /lead setting up the clan avenue

Focus areas		2025–2026 outcomes (what we want to achieve)	2025–2026 activities (what we plan to do to achieve this)	Evidence of progress
		<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"> Build on links made as a result of the chief's visit <ul style="list-style-type: none"> Otago Heritage Council Combined Clans and Societies Group Otago Waipu Scottish Migration Museum Warkworth Museum New subscribers to newsletter 	<ul style="list-style-type: none"> Mathesons included in / contribute to local activities New opportunities provided for Mathesons to meet
		<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"> Offer our newsletter to other clans in the clan avenue Make direct approach to other Scottish organisation 	<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"> Identify opportunities to strengthen connections with the international Clan Matheson society and with branches in other countries <ul style="list-style-type: none"> Other branches profiled in newsletter Contribute to international newsletter including a description of how the New Zealand branch works Questions/comments/suggestions from other branches responded to 	<ul style="list-style-type: none"> Kiwi Mathesons have increased visibility of the clan in other branches Other branches have access to information about the New Zealand branch
			<ul style="list-style-type: none"> Investigate having the Matheson international magazine available in New Zealand 	<ul style="list-style-type: none"> International newsletter available in part or whole in New Zealand

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Help people with Matheson heritage find out more about their family history and stories		<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?)