

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 | <ul style="list-style-type: none"> Potential committee members identified. More Mathesons involved in clan activities. |
| | | | <ul style="list-style-type: none"> Process for inviting committee members developed | |
| | | | <ul style="list-style-type: none"> Trustees and committee develop respective succession plans including principles and actions | <ul style="list-style-type: none"> Succession plan developed to ensure continuity of branch support through committee members and trustees |
| | finance | <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 |
| | | <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 |

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|--|-----------------------------|--|---|--|
| Forge links between people in New Zealand with Matheson heritage, and between them and kinsfolk in other countries | Strengthening relationships | <ul style="list-style-type: none"> Mathesons continue to meet at clan tent for fellowship and information | <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 | <ul style="list-style-type: none"> Committee has the knowledge and understanding of local Mathesons to enable involvement in activities |
| | | <ul style="list-style-type: none"> Clan Matheson tent is present at Highland games and pipe band events | <ul style="list-style-type: none"> Clan tent at: <ul style="list-style-type: none"> Hororata, Waipu, Turakina, Paeroa Other events where Mathesons may gather | <ul style="list-style-type: none"> Clan tent at: <ul style="list-style-type: none"> the four Highland games events National pipe band championships |
| | | <ul style="list-style-type: none"> If feasible, a small Matheson badge is available to Mathesons | <ul style="list-style-type: none"> Investigate developing a small colourful badge <ul style="list-style-type: none"> Matheson demand makes sales possible Financially viable Consult with chief | <ul style="list-style-type: none"> A decision is made on whether it is practicable and affordable to make a small unique Matheson badge available |
| | | <ul style="list-style-type: none"> Mathesons have quality succinct information | <ul style="list-style-type: none"> Update print promotional brochure removing reference to grant and changing the reference to donations | <ul style="list-style-type: none"> Up to date promotional brochure in use |
| | | <ul style="list-style-type: none"> Matheson tent at National Pipe Band Championships (NPBC) clan avenue in the future | <ul style="list-style-type: none"> Support ongoing Matheson participation at National NPBC clan avenue | <ul style="list-style-type: none"> Clan Matheson tent at NPBC in Inglewood |
| | | | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> Clan avenue of several clans and organisations Clan avenue site supports easy access to clan tents |
| | | | <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 avenue Local clans' representatives support /lead setting up the clan avenue |

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|-------------|--|--|--|--|
| | | <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?) |
| | | | <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 | <ul style="list-style-type: none"> Visitors to tent use digital media to research family stories and history |
| | | | <ul style="list-style-type: none"> Opportunities and resources needed to enhance use of clan information considered by committee | <ul style="list-style-type: none"> Resources are used to further support Mathesons to learn about their family / heritage |
| | | | <ul style="list-style-type: none"> Identify opportunities for virtual gatherings to support use of family history resources | <ul style="list-style-type: none"> More Mathesons investigating their family stories |
| | | <ul style="list-style-type: none"> Engaging in Matheson history and settlement in local areas supports understanding of family stories and history | <ul style="list-style-type: none"> Investigate tour of historical Matheson sites <ul style="list-style-type: none"> Maps, podcast, video possibilities Build on the website list of Matheson place names | <ul style="list-style-type: none"> Mathesons use information and report increased knowledge of their Matheson family. |