

Clan Matheson New Zealand report on annual plan 2024–2025

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 2024–2028

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 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 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 the 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 	

Report on Clan Matheson New Zealand annual plan: 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	Activities completed
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"> A little discussion
		<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"> Newsletter June 2024 includes invitation for Mathesons to volunteer to be involved Now BAU
		<ul style="list-style-type: none"> Trustees and committee to 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 	<ul style="list-style-type: none"> A little discussion
	<ul style="list-style-type: none"> Individuals invited to support clan work 	<ul style="list-style-type: none"> Invitation in newsletter, 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"> Newsletter June 2024 includes invitation for Mathesons to volunteer A little discussion with visitors at tent about further involvement Now BAU
	<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"> Link to trust information on website in About us and then links to trust details and trust report.
	<ul style="list-style-type: none"> Procedures implemented to meet legal requirements High quality financial reporting in place 	<ul style="list-style-type: none"> Annual cycle of trust and committee planning and reporting of activities and finances is documented and implemented <i>Update plan and trust report when confirmed</i> 	<ul style="list-style-type: none"> Documents developed and available on website 	<ul style="list-style-type: none"> Two links to planning documents in About us and Support us June 24 trust report submitted to Charities Services Nov 24 Now BAU
		<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 on financial position and activities 	<ul style="list-style-type: none"> Treasurer providing monthly bank balances, cashflow analysis and has payments and reports approved by committee. Now BAU

Focus areas	2024–2025 outcomes (what we want to achieve)	2024–2025 activities (what we plan to do to achieve this)	Evidence of progress	Activities completed
	<ul style="list-style-type: none"> Sponsor agrees to meet ongoing costs for 2 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"> No response from initial contact Second contact declined to sponsor
	<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 	<ul style="list-style-type: none"> Funding to be available before the committee begins implementing activities
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 Matheson history identified and supported 	<ul style="list-style-type: none"> Committee has knowledge and understanding of local Mathesons 	<ul style="list-style-type: none"> Strong links made with Mathesons in Southland/Otago as preparation for the Chief's visit and Waihopai- Invercargill national pipe band championships Initial contacts at Waipu gathering
		<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"> Facebook posts include upcoming events and events tab may be used Website has Events under 'Get Involved'
	<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 pipe band championships (NPBC) clan alley 	<ul style="list-style-type: none"> Clan Matheson tent at NPBC in Invercargill 	<ul style="list-style-type: none"> Clan Matheson leads the organisation of clan avenue at Invercargill resulting in success shown by: <ul style="list-style-type: none"> 10 clans and Scottish organisations (up from 6 in 2024) Good numbers in the clan tent 2026 Inglewood organisers made contact with Wayne Wayne leading communication with clans to confirm participants in clan avenue 2026
		<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 the clan avenue 	<ul style="list-style-type: none"> Detailed standard operating procedures are developed and can be added to Documents and clan contacts are able to be used for following year NPBC organisers for 2026 initiated contact with Wayne to confirm support for clan avenue

Focus areas	2024–2025 outcomes (what we want to achieve)	2024–2025 activities (what we plan to do to achieve this)	Evidence of progress	Activities completed
	<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 Chief's visit – continued.. 	<ul style="list-style-type: none"> Visit plans confirmed Mathesons gather at agreed venues 	<ul style="list-style-type: none"> Sir Alexander and Lady Matheson generous and warm with their time among Kiwi Mathesons Wider appreciation of Clan Matheson and its aims and visit gave a significant boost to the organisation Effective communication plan including through local media Mathesons appreciated opportunity to meet at Waipu 31 newsletter subscribers signed up as a result of chief's events Overall, participation was beyond the expectations of the committee Several ideas for committee activities to build on the impact of the visit.
	<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"> 219 newsletters emailed in March Not possible to separately identify all clans and Scottish organisations 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 the international gathering 	<ul style="list-style-type: none"> Links to Scotland/other branches established Matheson March highlighted 	<ul style="list-style-type: none"> Personal links made with other Mathesons Clan national leaders in contact with Chief's Lieutenant
		<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 	<ul style="list-style-type: none"> Chief cancelled order Discussion underway about other New Zealand badges.

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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"> 509 members of Facebook group 219 newsletters emailed and 7 posted Communication strategy agreed, confirming newsletter as prime communication mode with Facebook being a topical back-up. Communication about events clear Now BAU
		<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"> Models developed for enabling tent/event visitors to sign up to newsletter Now BAU
		<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"> 13 organisations offered flier/brochure Flier provided to 5 Scottish shops and Matheson Café Brochure handed out by committee members at tent and other events
	<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 resources are significant and valuable content in newsletter and then on website Now BAU
	<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 	<ul style="list-style-type: none"> More clan family stories and history resources are available at the tent 	<ul style="list-style-type: none"> Learning about family stories and the support Clan Matheson provides for this a focus of several tent resources Visitors to tent supported to consider using resources Now BAU
		<ul style="list-style-type: none"> Identify ways of engaging visitors to tent in further use of resources 	<ul style="list-style-type: none"> Visitors use resources at the tent (possible?) 	<ul style="list-style-type: none"> Limited to books and websites in Scotland and a little support using digital media Now BAU

Focus areas	2024–2025 outcomes (what we want to achieve)	2024–2025 activities (what we plan to do to achieve this)	Evidence of progress	Activities completed
•		<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"> A little discussion about possibilities
		<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 nu committee 	<ul style="list-style-type: none"> A little discussion about possibilities

Completed	Ongoing	Not continuing
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