

Clan Matheson New Zealand — annual plan 2026–2027 and goals for 2026–2030

Workstream Alignment with purpose ¹	Outcome of discussion	2026–2027 plan	2026–2030 goals
Protect, preserve, enhance, promote, record, publish and otherwise disseminate Matheson heritage			
Newsletter a, d b, c, e, h, i	Important; continue. Consider hybrid email/web to increase appeal to new audiences, despite results of 2023 survey of existing subscribers.	Aim: decide whether to move to a hybrid email/web format, or put the question aside for the time being. Action: Andrew to prepare a written assessment and proposal for consideration at the November 2026 committee meeting. Action: Andrew to solicit copy with a call out on Facebook and in the newsletter, by 30 September 2026. Routine business: Andrew to be more active at soliciting articles through personal approaches. People at events to be more active at soliciting articles through personal approaches.	We still have a news function in some format(s), as this is a prime means of meeting our objectives such as building linkages, promoting Matheson heritage and upskilling people in family history techniques. There are more contributors to the newsletter on specialist topics, with the newsletter editor ensuring consistency of style and format.

¹ Each workstream is linked to a primary purpose or purposes (**bold**) and to other purposes it aligns with. Associating each workstream with at least one purpose is to help ensure that our work is aligned with our charitable purposes — the list of purposes for each workstream doesn't have to be exhaustive. The organisation's charitable purposes and objects, grouped into three focus areas, are set out at the end of this document for reference.

Workstream Alignment with purpose ¹	Outcome of discussion	2026–2027 plan	2026–2030 goals
Website a, d b, c, e, h, i	Continue. High priority. <i>Is there potential to improve architecture, appearance and functionality?</i>	Aim: get an analysis/proposal of what changes would be beneficial. Action: Andrew to prepare a written assessment and proposal for consideration at the November 2026 committee meeting. Action: Andrew to discuss website architecture and possible increased use of analytics with Kirk, by 30 August 2026. Action: Andrew to coordinate development of a children’s resource area for the website. Lena to liaise with Anna Meakin over content and Andrew to liaise with Kirk over architecture, both reporting to February 2027 committee meeting.	The website is easier to maintain. There are more contributors to the website on specialist topics, with the website manager acting both as a contributor and an editor to ensure consistency of style and format. Analytics are used in a cost-effective way to measure and potentially improve how the website achieves our aims for it.

Workstream Alignment with purpose ¹	Outcome of discussion	2026–2027 plan	2026–2030 goals
Help people discover their Matheson heritage			
Encourage and promote individuals' research into their family history and heritage c, b	Helping people get started, 1 on 1, can be very engaging. We have a great range of material (e.g. on the website) but need to take it further to popularise it/make it more engaging. Ideas: Virtual tour of sites of Matheson heritage. AI animation Get a power source for a laptop and try it at next season's events. Review and promote the 12-step guide. Video? Try a family history webinar.	Aim: be able to demonstrate more value to visitors to the clan tent, and to help fulfil this aim ('Encourage and promote individuals' research ...'). Action: Rodger to test providing an individual family history research service at North Island events over the 2026/2027 summer (Waipu, Turakina, Paeroa), and report to the February or May 2027 committee meeting. Action: Rodger and Lena to obtain a power source for a laptop by December 2026. Aim: enhance visibility of family history 'how to' guides on the website. Action: Andrew to revise this section of the website, promote it through the newsletter and Facebook, and experiment with NotebookLM by 30 November 2026. Aim: provide some place-based story telling to increase people's interest in Matheson heritage in New Zealand. Action: Rodger to prepare a written assessment and proposal for consideration at the August 2026 committee meeting.	Assessment made of the need for and feasibility of providing a suitably-resourced family research service at events. We start an occasional or regular series of Matheson-themed family history webinars, geared to helping people start and continue their own family history exploration. We identify other new ways of helping Mathesons² discover their family stories.

² 'Matheson' is shorthand for anyone with an interest in Matheson heritage.

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Encourage and support research etc into Scottish heritage as it relates to Clan Matheson b	A hook to get engagement? Supports the row above. Not a high priority.	Aim: promote and provide more support for people’s exploration of Scottish heritage to inform their investigations into Matheson heritage. Action: Andrew to expand the existing Scottish heritage section of the website, starting with recycling newsletter material, by March 2027. Action: Andrew to follow up with the Chief by December 2026 about Andrew’s proposal that the UK branch develops a guide to important sites in the UK related to Matheson heritage (for overseas visitors).	Popularise descriptions or accounts of how Scottishness has influenced New Zealand ³ . The main means will be articles on the website and in the newsletter. This is a lower priority than content on other topics.

³ We surveyed some more academic literature on this topic in the March 2026 newsletter.

Workstream Alignment with purpose ¹	Outcome of discussion	2026–2027 plan	2026–2030 goals
Outreach, promotion and engagement			
Social media e, a, b, c, d, h i	We don't have suitable material for other platforms (e.g. Tiktok, Instagram). Audiences for those platforms might not be very interested in our offerings anyway. Stick with Facebook.	Aim: continue to use social media to support our three focus areas. Routine business: Andrew to continue operating the Facebook group as at present. Each committee member to continue contributing to the Facebook group. Action: Lena to report on further use of Facebook analytics in addition to Andrew's report of 10 March 2026.	Choice of platform and results from social media use are reviewed annually.

Workstream Alignment with purpose ¹	Outcome of discussion	2026–2027 plan	2026–2030 goals
Events: Clan Matheson tent e, a i	Who's around? There aren't many who might be interested. Yet there are plenty of younger Mathesons are out there, but they may not feel such as strong connections or may have a temporary or intermittent interest. Need to pitch through media before any events. Be more direct in person. Sell the benefits to them.	Aim: to have more involvement by Mathesons in our clan tent at events. Action: The lead for each event to prepare a programme and resources plan (including targeted local promotion and improved collateral) for committee endorsement of events where Clan Matheson will have a its tent over the 2026/2027 summer; by 28 July 2026 Action The lead for each event to prepare a publicity plan for events where Clan Matheson New Zealand will have its tent over 2026/2027, including targeting publicity to local outlets.⁴, by 28 July 2026. Action: Anyone representing Clan Matheson New Zealand at events to be more direct in person at inviting involvement from individuals, and report back after each event on results. Aim: improved collateral to support personal engagement at events. Action: Wayne to prepare a plan for improving collateral for the next summer, for consideration at the August 2026 committee meeting.	An increasingly professional and effective presence at targeted events.

⁴ Note that a forthcoming committee paper on family history organisations in New Zealand has links to local branch newsletters, websites and Facebook pages that could be useful as a supplement to using our own channels.

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Events: participation in others e, i, a	Clan Matheson has credibility and profile. Dinners, coffee mornings etc wouldn't attract people, which is why we leverage of others' events to give a face to Clan Matheson.	Aim: to have targeted Clan Matheson New Zealand representation that will help further our objectives. Action: Committee to agree at the August meeting each year on a programme of other events where Clan Matheson New Zealand will be represented, and plan resources and publicity needed.	An increasingly professional and effective presence at targeted events.
Promotion supports all	Reconsider idea of a (New Zealand) Clan Matheson badge	Aim: decide whether producing a badge would be an effective initiative. Action: Wayne to prepare a written assessment and proposal (with costings and potential suppliers) for consideration at the November 2027 committee meeting. Action: if we decide to proceed, Lara will investigate commissioning a design and Andrew will get the Chief's approval for our final choice of design.	Opportunities for cost-effective promotion material or channels considered regulatory, and existing material (e.g. brochure, name-cards) used effectively.

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Other: leveraging off other related organisations supports all	Could develop linkages with Scottish heritage organisations (e.g. Otago, Canterbury) Need to be selective and think about how this helps us achieve our purpose and objectives.	Aim: decide whether and how engaging with other relevant organisations would help us further our objectives while using our resources efficiently. Action: Andrew to prepare a written assessment and proposal to the November 2026 committee meeting on piggybacking on the channels provided by family history organisations to raise the profile of Clan Matheson New Zealand. Action: Wayne to report to the August 2026 committee meeting on opportunities to foster links with relevant Otago/Southland organisations who were contacted in connection with the Chief’s visit in 2025. Action: Lena to report to the February 2027 committee meeting on opportunities to foster links with the Warkworth museum.	

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Forge linkages			
International Clan Matheson linkages h	Invite Australians? Put on a mini-tour and encourage them to come. Virtual committee meeting to share ideas and challenges? CL virtual meeting annually?	Aim: increase collaboration with other Clan Matheson branches, and increase New Zealand Mathesons' awareness of the clan's international linkages. Action: Lena to prepare a written proposal (e.g. participants, purpose, agenda, timing) for an ideas-sharing video call with the Australian committee, for the August 2026 committee meeting. Action: Andrew to propose to the Chief a structured annual video call between him and his Chief's Lieutenants, by December 2026. Routine business: Andrew to continue reporting on other branches' activities in our newsletter as appropriate (following on from the December 2025 article).	Increase New Zealand Mathesons' awareness of Matheson heritage in the UK and of the global Matheson diaspora. Plan how to foster interest in New Zealand participation in the 2030 international gathering in Scotland. Consider, depending on the outcome of the transtasman video call, planning a mini-tour to invite Australian Mathesons to.
Linkages with other clan and Scottish organisations in New Zealand i	Need to talk to the right person to get more uptake of the newsletter by clans. Not competitors, but collaborators in the same aim. Many people have ancestral connections to multiple clans, so there will be Mathesons in other clan organisations.	Aim: promote Clan Matheson New Zealand to and through other clan and Scottish organisations, to reach people with Matheson heritage who are primarily involved with other organisations. Action: Anyone representing Clan Matheson New Zealand at events to be more direct in person at inviting other clans to subscribe to our newsletter and advising them of our website and Facebook group, and report back after each event on results.	

Workstream Alignment with purpose ¹	Outcome of discussion	2026–2027 plan	2026–2030 goals
Branch: committee and trust			
Committee f	Separate meeting to brainstorm this	Aim: foster and maintain the effectiveness of the committee over time. Action: Lena to plan a separate committee discussion about this by September 2026. Action: Anyone representing Clan Matheson New Zealand at events to be more direct in person at identifying people who might be suitable committee members, and report back after each event on results.	Appropriate numbers and skill range on committee. Succession planning a continual activity.
Branch finances g f	Ticking on OK. Success breeds success. Put out a call for a legacy. Foundation for our future. Help share your legacy for future generations.	Aim: widen the possible sources of income. Action: Andrew to put an article on bequests in a future newsletter, to be repeated periodically, and on the website, by December 2026.	Income continues to support routine expenditure. Opportunities are identified for specific funding for special projects.
Others with specific roles f	Who's around? There aren't many who might be interested. Need to pitch through media before any events. Be more direct in person.	Aim: increase the skill base and capacity of our organisation. Action: Rodger, Lena and anyone else representing Clan Matheson New Zealand at events to be more direct in person at inviting involvement from individuals who might pick up a specific role or function, and report back after each event on results.	A wider range of people take part in our clan tent and at other events. A wider range of people help with specific activities such as the website, news and Facebook.

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Records and reporting requirements f, g		Aim: development of a ‘management handbook’ for the next tranche of active individuals. Action: Andrew to finalise contents page by May 2027 committee meeting, so authorship can be assigned. Aim: central document storage is fully used. Action: each committee member to load significant/enduring documentation within their area of responsibility by 31 December 2026.	Statutory reporting requirements continue to be met. Organisational processes are better documented to support consistency of actions and succession of personnel.
Trust and trustees f		Aim: strengthen the governance role of the trustees as a support to the management role of the committee. Action: trustees review their involvement in the planning process and in governance oversight of the organisation, by 30 August 2026.	Appropriate numbers of, and skill range among, trustees. Succession planning a continual activity.

Focus areas and charitable purpose and objects

The charitable purposes and objects are the basis of Clan Matheson New Zealand and underpin its legal existence and charitable status. Everything we do should relate to at least one of these.

The focus areas are the ‘elevator pitch’ to explain and understand why we exist, and are a high-level summary of the legally-determinative charitable purposes and objects.

Focus areas	Charitable purposes 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.
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	(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.
	(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.
Underpinning all three focus areas	(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.