

## DRAFT MORIORI IMI SETTLEMENT TRUST 5-YEAR PLAN 2025-2030

The 5-Year Plan illustrates a high-level view of the strategic initiatives to be carried out by Mori Imi Settlement Trust (“MIST”). The plan is intended to provide a foundation from which MIST Trustees can identify strategic activities that will help drive achievement of the plan for Imi over the next 5 years.

<b>Nunukutanga</b> Leadership	<b>Hokopapa</b> Cultural Identity	<b>Hūnautanga</b> People	<b>Tatakitanga/T’chiekitanga</b> Environment	<b>Hokotipurangatanga</b> Economic Prosperity
<p>Mori Imi as an Imi will be known for our integrity and leadership. It is our responsibility to represent and amplify the united voice of our people and maximise our collective strength to achieve our aspirations.</p>	<p>Hokopapa is the foundation of our identity as Mori Imi.</p>	<p>Our hūnau wellbeing – to thrive physically, spiritually, socially, economically, emotionally and culturally.</p>	<p>Working towards the restoration, protection and enhancement of our environment – all land, water, air, sea and natural miheke within our region for future generations.</p>	<p>We aspire to economic prosperity and sustainability to deliver meaningful outcomes for Mori Imi. All our investment decisions reflect our values and contribute to achieving our vision.</p>
KEY ACTIVITIES	KEY ACTIVITIES	KEY ACTIVITIES	KEY ACTIVITIES	KEY ACTIVITIES
<p><b>Communication and Engagement</b> MIST will focus on communications and engagement with hūnau, so that hūnau will be provided with opportunities to participate in Imi affairs.</p> <p><b>Support Our Trustees</b> Our Trustees provide the internal leadership and external influence that shapes our path. We are committed to providing the right tools and support to equip them to achieve all Trust Deed and compliance requirements</p> <p><b>Advocate For and Protect Our Treaty Rights</b> We will protect our rights under Te Tiriti and advance our positions on matters that impact these rights.</p>	<p><b>Uphold and Strengthen Hokopapa and Cultural Identity</b> Support initiatives that empower our people to reconnect with their hokopapa.</p>	<p><b>Strong Communities</b> Mori Imi hūnau wellbeing is improved through the targeting of dedicated resources to meet identified hūnau needs and aspirations. Hūnau will be supported to engage in activities that enhance their physical, emotional, mental and spiritual health.</p> <p><b>Empowering Hūnau</b> Invest in opportunities for our hūnau that are aligned to the greatest social and financial impacts determined by our strategic priorities.</p>	<p><b>Imi Management Plan</b> Develop and implement an Imi (Environmental) Management Plan (IMP).</p> <p><b>Protection and Preservation</b> Ensure the protection of cultural miheke and wāhi tchap’ to safeguard our cultural heritage for future generations.</p> <p><b>Stakeholders</b> Partnership framework with DoC and environmental agencies.</p>	<p><b>Investment Framework</b> Create a robust and transparent investment framework to guide our investment decisions.</p> <p><b>Investment Portfolio/Asset Mix</b> Build a diversified portfolio of investments so the Trust is not over-exposed to one business sector or market.</p> <p><b>Responsible Asset Growth and Performance</b> Maximise our asset base to ensure income growth and long-term financial sustainability.</p> <p><b>Taxation/Reporting</b> Currently, we have tax-exempt charitable status and, where possible, this exemption should be maintained, and MIST must keep up-to-date with relevant legislation.</p>

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KEY MEASURES	KEY MEASURES	KEY MEASURES	KEY MEASURES	KEY MEASURES
<ul style="list-style-type: none"> <li>By Year 5, achieve a 50% increase in the number of hūnau members actively participating in MIST processes, such as voting, consultations, and meetings.</li> <li>By Year 2, implement a comprehensive communication strategy with multiple channels (e.g., newsletters, social media, webinars), ensuring hūnau are regularly informed about key settlement matters.</li> <li>New Trustees receive training and development plans.</li> <li>Activeness on key issues and positioning Moriori strongly with government and other key stakeholders.</li> <li>Strategic litigation efforts to uphold Moriori rights, in alignment with long term Imi priorities.</li> </ul>	<ul style="list-style-type: none"> <li>Establish a comprehensive membership database.</li> <li>Lead initiatives to revitalise and promote Moriori cultural practices, language and heritage – not only on Rēkohu/Rangihau but for all Moriori wherever they reside.</li> <li>Lead and participate in processes to determine Moriori guardianship, provenance and ownership of miheke.</li> </ul>	<ul style="list-style-type: none"> <li>Information is gathered about Moriori needs and aspirations so as to influence strategic outcomes and investment opportunities.</li> <li>Create a wellbeing framework based on Moriori values that addresses the pillars of health: physical, emotional, mental, and spiritual wellbeing.</li> <li>Create a Social and Economic Impact Framework by Year 2 to guide future investments.</li> </ul>	<ul style="list-style-type: none"> <li>Imi Management Plan and Wāhi Tchap' Plan adopted and operational by Year 2.</li> <li>Active protection and proper claim(s) of Moriori cultural miheke and wāhi tchap'.</li> <li>At least three key environmental projects initiated by Year 5 (long term investment).</li> <li>Annual joint restoration or monitoring projects completed on lands or marine areas (ongoing smaller-scale collaborative activities).</li> </ul>	<ul style="list-style-type: none"> <li>A fully implemented investment framework is in place and informs 100% of all new investment decisions by Year 5.</li> <li>Achieve and maintain a balanced and diversified portfolio by Year 5 with no more than [number]% concentration in any one sector.</li> <li>Asset base grows by at least 20% over five years while maintaining an average annual return that meets or exceeds industry benchmarks and supports operating costs.</li> <li>Charitable tax-exempt status is retained and compliant for five years.</li> </ul>