

# MORI ORI IMI SETTLEMENT TRUST

## DRAFT ANNUAL PLAN 2025-2026

This Annual Plan outlines our key activities for the fiscal year 1 July 2025 to 30 June 2026. It should be viewed alongside our 5-Year Plan.

### Vision

[insert here]

### Aspiration

[insert here]

### Objectives and Prioritised Activities

The upcoming sections will detail our targeted goals and highlighted activities. These are not exhaustive but focus on initiatives driving significant change.

NUNUKUTANGA leadership	
ACTIVITIES	GOALS 2025
<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.	<ul style="list-style-type: none"> <li>Establish initial engagement strategies to encourage hūnau involvement and begin tracking participation rates.</li> <li>Design and implement a communication strategy.</li> <li>Our 5-year and annual plan is agreed upon and communicated to key stakeholders.</li> </ul>
<b>Support Our Trustees</b> Our Trustees provide the internal leadership and external influence that shape our path. We are committed to providing the right tools and support to equip them to achieve all Trust Deed and compliance requirements.	<ul style="list-style-type: none"> <li>Ensure all new Trustees complete induction process and receive training (if required).</li> </ul>
<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.	<ul style="list-style-type: none"> <li>Participate in public consultations, submit recommendations to government bodies on legislation and policy that may affect our rights and values.</li> <li>Continue to protect our interests in matters that align with long-term priorities.</li> </ul>

HOKOPAPA Cultural Identity	
ACTIVITIES	GOALS 2025
<b>Uphold and Strengthen Hokopapa and Cultural Identity</b> Support initiatives that empower our people to reconnect with their hokopapa.	<ul style="list-style-type: none"> <li>Build and finalise a comprehensive membership database system.</li> <li>Determine Mori tchikitanga and ownership of miheke, including the determination of the rightful ownership of the Rangihoua waka.</li> <li>Organise a survey to gather data on the current state of Mori cultural practices, language and heritage to identify needs of revitalisation.</li> </ul>

HŪNGAUTANGA People	
ACTIVITIES	GOALS 2025
<b>Strong Communities</b> Moriŀi 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.	<ul style="list-style-type: none"> <li>Organise a comprehensive survey to gather data on the health and wellbeing needs of the hūnau, covering areas such as physical health, mental health, social support, and cultural engagement.</li> <li>Develop a system to categorise and analyse the data collected.</li> <li>Identify top five key priorities and needs that can influence future decisions.</li> </ul>
<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.	<ul style="list-style-type: none"> <li>Prepare a report identifying key social and economic factors that should guide future investments and have the greatest social and financial impacts for Moriŀi hūnau.</li> <li>Build strategic partnerships with businesses and organisations to create collaborative investment opportunities for hūnau.</li> </ul>

TATAKITANGA/T'CHIEKITANGA Environment	
ACTIVITIES	GOALS 2025
<b>Imi Management Plan</b> Develop and implement an Imi (Environmental) Management Plan (IMP).	<ul style="list-style-type: none"> <li>Draft Imi Management Plan, ensuring it reflects the values, aspirations, and priorities of the Imi by Year 1.</li> </ul>
<b>Protection and Preservation</b> Ensure the protection of cultural miheke and wāhi tchap' to safeguard our cultural heritage for future generations.	<ul style="list-style-type: none"> <li>Wāhi Tchap' Plan formally adopted by MIST by the end of Year 1.</li> <li>Compile an inventory of known miheke and wāhi tchap' and ensure that all relevant cultural sites are well documented and protected.</li> </ul>
<b>Stakeholders</b> Partnership framework with Department of Conservation and environmental agencies	<ul style="list-style-type: none"> <li>Complete a project proposal list with at least two key environmental projects identified by the end of first quarter.</li> <li>Begin the pilot phase of the first and second environmental projects by the end of Year 1.</li> <li>Work with local conservation groups and government bodies to identify opportunities for joint restoration or monitoring projects.</li> <li>Begin implementing restoration and monitoring activities, focusing on areas of environmental importance to the Moriŀi community.</li> </ul>

## HOKOTIPURANGATANGA

Economic Prosperity

ACTIVITIES	GOALS 2025
<b>Investment Framework</b> We will create a robust and transparent investment framework to guide our investment decisions.	<ul style="list-style-type: none"><li>• Establish a formal, written investment policy that defines the Trust's investment objectives, risk tolerance, asset allocation, and decision-making processes.</li><li>• Draft a robust investment framework/strategy by end of quarter 2.</li><li>• In collaboration with Moriori hūnau, finalise the investment strategy by end of Year 1.</li></ul>
<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.	<ul style="list-style-type: none"><li>• Ensure the investment portfolio is diversified across sectors, asset classes, and markets to minimise risk.</li><li>• Allocate a portion of the portfolio to investments that align with Moriori values, such as sustainability, cultural preservation, and community impact.</li></ul>
<b>Responsible Asset Growth and Performance</b> Maximise our asset base to ensure income growth and long-term financial sustainability.	<ul style="list-style-type: none"><li>• Set annual asset growth targets, breaking down the growth target over five years.</li><li>• Achieve at least a 5% asset growth in Year 1.</li></ul>
<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.	<ul style="list-style-type: none"><li>• Comply with Charities Act 2005 and Inland Revenue Department (IRD) regulations.</li><li>• Ensure timely submission of annual returns to Charities Services and financial statements to the IRD.</li></ul>