

# Te Ngakinga o Whanganui Investment Trust Five Year Strategic Plan 2016 -2021

(Updated for the 2018-19 Financial Year: *Year 3 Stabilise*)

## NGĀ UARA

KA WHAKATŌ NGĀ PURAPURA  
KA NGAKI I TE MĀRA  
KA PUĀWAI NGĀ HUA

PROTECT THE ASSETS OF TE NGAKINGA FOR FUTURE GENERATIONS  
TO GROW AND DEVELOP THE ASSETS OF TE NGAKINGA SO THEY PROVIDE FOR TODAY AND TOMORROW  
THAT THE IWI HAVE THE BENEFITS OF OUR WORK

This strategic plan aligns with the Five Year Strategic Plan of Ngā Tāngata Tiaki o Whanganui (NTTOW). Te Ngakinga is committed to delivering the strategic directions described in this plan and in doing so meeting its accountability to Ngā Tangata Tiaki and ngā Iwi of Whanganui. This plan recognises that the Trust is in its establishment phase and is building its investment approach.

Year 1 Establish

Year 2 - 3 Stabilise

Year 4 - 5 Grow

KEY FOCI	OBJECTIVE <i>Specific outcomes sought</i>	KEY PERFORMANCE INDICATORS <i>Indicators that monitor success</i>
Clarity and Understanding across all communities of Te Awa Tupua	<ul style="list-style-type: none"> <li>Te Ngakinga strategy and plans aligned with NTT Group Communications Plan</li> <li>Te Ngakinga's SIPO, DIP, Strategic &amp; Annual Plans all aligned to NTT Strategic Goals and available to all uri</li> <li>Te Ngakinga profile amongst uri is raised</li> </ul>	<ul style="list-style-type: none"> <li>Te Ngakinga contributes to NTT Group communications regularly</li> <li>Te Ngakinga corporate documentation available for review by uri</li> <li>Te Ngakinga's role is understood by uri</li> <li>Te Ngakinga communicates in a way accessible to uri, including by providing accessible reporting of progress</li> </ul>
Whanganuitanga	<ul style="list-style-type: none"> <li>Te Ngakinga upholds Whanganuitanga</li> <li>Te Ngakinga contributes (where possible) to hapū development</li> </ul>	<ul style="list-style-type: none"> <li>Te Ngakinga seen to behave in accordance with Tupua Te Kawa</li> <li>Te Ngakinga investigates investment opportunities that have the potential to benefit hapū</li> </ul>
A Prosperous Tribal Nation	<ul style="list-style-type: none"> <li>Te Ngakinga contribute to NTT Group wealth creation</li> <li>Contributes towards iwi having the knowledge, capability and opportunity to ensure that iwi assets are managed prudently and grow to provide for current priorities and future prosperity</li> <li>Direct Investment Policy completed and implemented</li> </ul>	<ul style="list-style-type: none"> <li>Te Ngakinga trustees participate in NTT Group asset management workshops</li> <li>Te Ngakinga developed, along with NTT, appropriate structures and processes to assess investment opportunities as they arise (including environmental impacts)</li> <li>Te Ngakinga assesses investment opportunities from within the iwi against relevant investment criteria and processes</li> <li>Where appropriate, Te Ngakinga assists in the development of investment capability and understanding within the iwi</li> <li>Te Ngakinga implements Direct Investment Policy</li> </ul>
Trust and confidence	<ul style="list-style-type: none"> <li>Continual improvement of governance, management and organisational performance, proficiency, effectiveness and excellence</li> </ul>	<ul style="list-style-type: none"> <li>Te Ngakinga adopts Governance Guidelines</li> <li>Te Ngakinga meets its benchmark return objectives over rolling 3-year periods</li> </ul>