

National
SCIENCE
Challenges



Bridging whenua enhancement plans with the next generation of Kaitiaki

Prepared for Our Land and Water

February 2023

Prepared by: Ray Mohan, Project Lead

Ahikā Consulting Ltd

Rural Professional Fund 21-22

Acknowledgements

We would like to express our sincere gratitude to Our Land and Water for funding this project through the Rural Professional Fund.

This project would not have been possible without the support and participation of the Komiti members and shareholders of Pūrākaunui Block Incorporation and Akapatiki A Block Incorporation, and we thank them for their valuable insights and willingness to share their thoughts and feelings on this important topic.

Special thanks to the Komiti members, Stephen Owens and Michelle Taiaroa from Akapatiki A Block Incorporated, and Nicola Taylor from Pūrākaunui Block Inc for their support in the development of the project.

We also extend our appreciation to Joy Smith from the Ngāi Tahu Law Centre, Haines Ellison from MPI Māori Agribusiness, and Paul Hansen from the University of Otago, for their invaluable support and expertise throughout the project.

This project would not have been possible without the generous contribution of time and knowledge from all those involved. Their participation has been instrumental in providing a deeper understanding of the challenges and opportunities associated with the future-proofing whenua Māori Incorporations and Trusts and connecting with the next generation of Kaitiaki.

Te piko o te māhuri, tērā te tupu o te rākau

'The way in which the young sapling is nurtured, determines how the tree will grow'

Contents

Introduction	1
Research objectives	2
Methodology and tools	2
Project outputs	4
Findings	5
Understanding future-proofing drivers	5
Evaluation of land use opportunities.....	6
Barriers to engagement.....	8
Pathways to transfer knowledge.....	9
Opportunities for connecting and identifying whānau	9
Building the succession pipeline	10
Building a team approach	10
Communications platforms:	11
Learnings for future engagement	13

Executive Summary

While succession planning is an area of concern for numerous farms across Aotearoa, the multi-generational dynamics and complex governance and ownership structures of Whenua Māori Trusts and Incorporations add an extra aspect to the challenges of implementing land use plans growing from Mātauranga Māori.

The impact of increasing urbanisation has often weakened whānau connection to the whenua. This has resulted in a challenge for Māori trustees in identifying and reconnecting whānau back to the whenua, and to encourage growth in knowledge that enables kaitiaki responsibilities to be upheld and to implement future-proofing plans. For Komiti, there is a strong desire to improve the intergenerational connection to Te Taiao.

In this research project funded by Our Land and Water, we worked with two case-study Incorporations located in Otago, New Zealand to explore the barriers that whānau face in reconnecting with their whenua, and to develop a futureproofing implementation plan and strategies for promoting successful reconnection.

To support the development of the implementation plans, whānau perspectives and preferences on different land use opportunities for diversification were explored through the use of the 1000minds tool, developed by Paul Hansen and Franz Ombler from the University of Otago.

The biggest barriers identified from the survey process were whānau commitments, health and mobility issues, lack of accommodation, work commitments and the cost of travel.

To address these barriers and support the development of a succession pipeline, the following themes were explored: 1) A team approach for whānau, hapū, and rūnanga; 2) Incorporation of customary leadership values into future kaitiaki roles and structures; 3) The requirement for kin-responsibility, and how this can influence whenua-related decisions; and lastly, 4) The importance of mana and manaakitanga in decision making and planning.

The cultivation of successors, development of a shared vision, and support and mentoring of rangatahi to take on leadership roles in the community were highlighted as key pathways for Komiti.

Introduction

Working with Māori agribusiness has shown that the concept of futureproofing is not solely based on meeting regulatory compliances and maintaining economic viability. The cultural narrative and history of the landscape, and future goals for both whānau and whenua are at the forefront of decision-making when it comes to developing environmental plans and ensuring that management of the whenua will lead to an improvement in te Taiao; the natural world that contains and surrounds humanity in an interconnected relationship of respect.

While succession planning is an area of concern for numerous farms across Aotearoa, the multi-generational dynamics and complex governance and ownership structures of Whenua Māori Trusts and Incorporations add an extra aspect to the challenges of implementing land use plans growing from Mātauranga Māori.

The impact of increasing urbanisation has often weakened whānau connection to the whenua. This has resulted in a challenge for Māori trustees in identifying and reconnecting whānau back to the whenua, and to encourage growth in knowledge that enables kaitiaki responsibilities to be upheld. For some current trustees, there is a strong desire to improve the intergenerational connection to te Taiao.

Governance tools identify key factors such as the transfer of skills and knowledge, but emphasis is often on the transfer of assets, without consideration for Mātauranga Māori.

These tools do not address the big question asked by the Whenua Māori Komiti – How can whānau develop pathways to identify and re-connect the next generation of kaitiaki, to ensure on-going enhancement of te Taiao?

For Whenua Incorporations and Trusts, engagement with the next generation of shareholders is proving to be a challenge. Annual shareholder meetings are often only attended by the older generation of existing shareholders, and the widespread locations of whānau makes it difficult to connect with the younger generation of future shareholders.

This research project seeks to explore the challenges faced by Whenua Māori Incorporations and Trusts in identifying and preparing successors for the future, to support the implementation of future. By examining two case studies of Whenua Māori Incorporations, both of which have shareholders ranging between late 60s to late 80s, this study will aim to identify the key factors that contribute to the successful identification and preparation of successors. This research is crucial as it will help to identify the best practices for succession planning that can be used to support the transfer of knowledge, skills, and experience necessary for the effective management of Māori land and natural resources.

The insights gained from the case studies will be valuable in informing the development of best practices for succession planning in Whenua Māori Incorporations and Trusts, which will ultimately help support the continued sustainability of these vital entities.

Research objectives

This project assessed the processes, tools and resources required to develop breadth and depth in the future Trustee and kaitiaki pipeline, in the context of continuing whenua development and land use change.

The aim of this project was to work with whānau to strengthen cultural connectedness, especially whānau who have not lived on the whenua for a long time, or ever. To achieve this, different approaches to exercising traditional customary roles, as well as the development of innovation and decision-making were considered with komiti.

This work was guided by strong environmental and cultural information, leadership relating to ancestral landscapes, and commitment.

Although there are clear differences between each land block and their shareholders, there are a number of similarities. Both blocks are situated in unique coastal environments and have ancestral significance. They are both currently farmed as sheep and beef operations, and the respective komiti are eager to diversify land use in keeping with aspirations around restoration of the whenua for future generations, sustainable ventures that enhance and protect te Taiao, and ensuring cultural and social benefits for shareholders. These similarities between the two case studies are likely to be shared by other Māori land Trusts and Incorporations across Aotearoa.

Methodology and tools

The following section outlines the methods used to achieve the research aims and objectives of this study. The research utilized a mixed-methods approach, consisting of qualitative data collection methods, such as in-depth interviews and hui with komiti, and a quantitative data collection method using the 1000minds decision-making tool.

- **Goal setting and understanding drivers**

This section involved working with the Komiti to understand their values, influences, and priorities around the future goals for the whenua. It also includes the establishment of an environmental strategy and vision for the whenua, incorporating history, whakapapa, and ancestral guidelines.

- **Establishing implementation stages and requirements**

In this section, a detailed assessment of skill requirements was conducted to support the implementation of each activity within the identified opportunities. Role identification and potential training requirements were also explored.

- **Whenua management and pathways for knowledge transfer**

This section involved understanding the skillsets present in governance and leadership and identifying key areas/gaps to be filled by the next generation. It also explored pathways for the transfer of knowledge between generations of kaitiaki and building social capital (e.g., mentoring).

- **1000minds model development**

The 1000minds tool is a web-based software application that enables the prioritization of options based on multiple criteria. Developed by Paul Hansen and Franz Ombler, the tool has been widely used in various fields, including healthcare, environmental management, and public policy. The 1000minds tool uses a process of pairwise comparison to generate individual priorities for each option and then aggregates these to rank the options according to their overall desirability. It allows for a large number of options and criteria to be analysed and can be adapted to suit specific decision-making contexts.

In this research project the 1000minds tool was used to understand the perspectives of shareholders around the whenua vision and opportunities, to enable distant shareholders to share their feedback and perspectives with Trustees.

- **Engaging with shareholders and finalising plan**

This section involves engagement with shareholders to understand their drivers and potential barriers to involvement in Trusts. It also explores kin-accountability and influence on whenua planning. Engagement occurred via workshops and email to introduce proposed strategy, 1000minds, and survey. Sharing findings with the community

This section involves sharing the findings in collaboration with organisations such as MPI Māori Agribusiness and Te Puni Kōkiri through online media, workshops to be run for other Trusts to share the process and experience of developing the work plan and the challenges tackled.

Project outputs

As part of this research project, a number of outputs have been developed to share the insights and learnings gained throughout the process. The first of these is a short video series that documents the journey, issues, challenges, and development of approaches from Komiti members and whānau in their efforts to strengthen the connectedness of whānau to whenua. This video series serves as a way to share the experiences and lessons learned, and to provide inspiration and guidance for other Māori trusts and incorporations facing similar challenges.

In addition, a template has been created which is specifically geared toward other whenua Māori trusts and incorporations. This template outlines the work undertaken during this project, as well as the key insights and potential approaches for addressing commonly shared challenges. This template can serve as a useful tool for other Māori trusts and incorporations to consider when developing their own strategies for engaging with their whānau and managing their whenua.

Finally, as part of the methodology outlined in a previous section, future workplans have been developed for the case study whenua trusts based on workshops and whānau hui. For the two case-study Incorporations, different approaches were taken to address the respective needs of the komiti in the development of the workplan.

While two different approaches taken by the two case-study Incorporations, as directed by the respective komiti, both workplans centred around the overarching goal of succession planning. While one Incorporation utilised a financial lens to assess land use opportunities, and the other focused on enhancing native vegetation, both strategies were geared towards creating a sustainable future for their respective whenua and ensuring intergenerational transfer of knowledge and resources.

These workplans will serve as a guide for the Trusts to implement the strategies identified through this research project, and to continue the work of strengthening the connection between whānau and their ancestral whenua.

Findings

The findings of this study highlight the complexity of the challenges faced by Māori whānau in reconnecting with their ancestral whenua and the importance of taking a holistic approach to succession planning.

This section presents the key drivers and potential barriers to engagement identified, and the ways in which whānau, kin community, and rūnanga can enable a team approach to succession. The findings also explore how customary leadership values can be incorporated into future kaitiaki roles and structures, the requirement for kin-responsibility, and how this can influence whenua-related decisions.

Additionally, this section will highlight the importance of mana and manaakitanga in decision-making and planning, emphasising the need for a culturally grounded approach to addressing the challenges of reconnecting with ancestral whenua.

Understanding future-proofing drivers

Building on the goals set by the case-study incorporations in previous land feasibility projects, the shareholders were invited to share their perspectives via a survey on what future-proofing the whenua meant to them. The survey aimed to gather information on what the shareholders considered as the most critical components for the future sustainability of the land.

After analysing the responses, several common themes emerged, which are summarised below in order of priority:

- 1. Enhancing the mauri of culturally significant sites;**
- 2. The growth of Māori-owned resources to generate increased equity;**
- 3. Enhancing the mauri of native flora and fauna;**
- 4. The protection of traditional food gathering areas;**
- 5. Providing whānau/hapū based training and employment opportunities.**

These themes represent the key areas that the participating shareholders believe are necessary to ensure the long-term viability and success of the land. The participants selected two themes as the top priorities for future-proofing the land, which were tied for first place in terms of overall importance. These two themes were the enhancement of the mauri of culturally significant sites, and the growth of Māori-owned resources to generate increased equity.

Evaluation of land use opportunities

The following land use opportunities were prioritised by the respective Incorporation Komiti for the survey:

Incorporation A prioritised land uses:

- Sheep and beef farming
- Native nursery
- Native restoration and carbon credits
- Crayfish/kōura farming
- Exotic Forestry (timber and carbon credits)

Incorporation B prioritised land uses:

- Sheep and beef farming
- Native restoration and carbon credits
- Crayfish/kōura farming
- Honey production
- Exotic Forestry (timber and carbon credits)

The land use opportunities were then evaluated by participating shareholders and whanau through the 1000minds' trade-off conjoint analysis tool. Participants were asked to work through a series of trade-off questions which asked them to evaluate a series of pairwise comparisons and asked to select their preferred option based off a specific criterion – the actual land use types were not shown to participants, instead participants had to choose between the potential impacts on guiding indicators.

These indicators were: Protection of wāhi tapu / taonga (sacred sites); Income generation potential; Enhancement of Mahinga kai/Mahika kai; Creation of whānau/kin employment opportunities; and lastly, Enhancement of native flora and fauna.

The corresponding impacts ranged from Excellent - very high enhancement, Good - high enhancement, Fair - some enhancement, and Minimal - no enhancement.

The table below presents an evaluation of each land use option in relation to how well the land use options support the guiding indicators used in the assessment.

Table 1 Evaluation of each land use option in relation to the guiding indicators.

Whenua option	Protection of wāhi tapu / taonga	Income generation potential	Enhancement of mahinga/ mahika kai	Creation of whānau employment opportunities	Enhancement of native flora and fauna
Kōura farming	Minimal	Excellent	Excellent	Excellent	Good
Native carbon credits and biodiversity restoration	Fair	Excellent	Minimal	Fair	Excellent
Sheep and beef farming	Minimal	Good	Minimal	Good	Minimal
Exotic forestry (timber and carbon credits)	Minimal	Excellent	Minimal	Fair	Minimal
Native nursery	Fair	Good	Fair	Excellent	Excellent

Barriers to engagement

With shareholders spread across the motu and overseas, visiting the whenua can be a challenge. Factors such as distance, cost, and competing demands on time and resources can make it difficult for whānau to reconnect with their whenua.

Shareholders and whānau were invited to share some of the barriers to visiting the whenua that they face. Figure 1 summaries the findings of this survey.

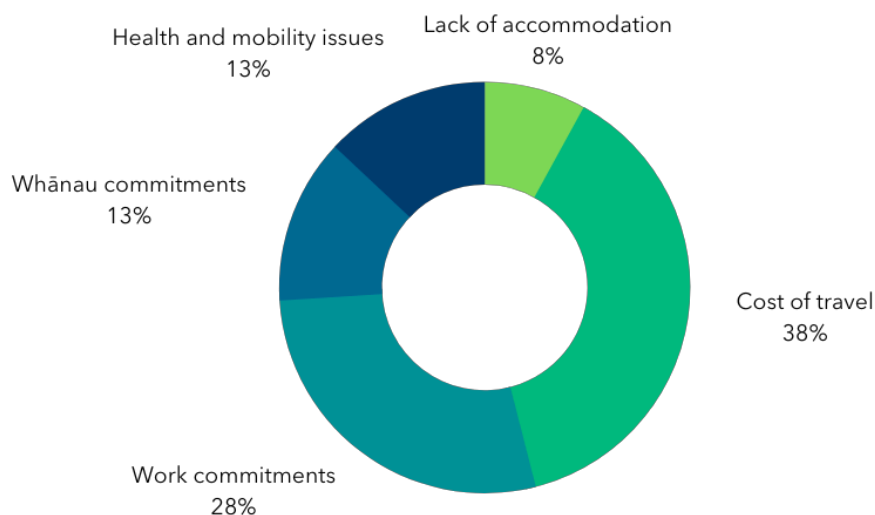


Figure 1 Barriers identified by participating shareholders

The cost of travel was identified as the biggest barrier faced by shareholders and whānau, with work commitments being another key barrier highlighted by participating whānau. Work commitments (28%) and whānau commitments (13%) were also identified as significant barriers to visiting the whenua. Health and mobility issues (13%) were also mentioned as a challenge. A smaller proportion of participants identified a lack of accommodation (8%) as a barrier.

Feedback indicated that for many whānau, disconnection from the whenua can also be a barrier to reconnecting with it. This may be due to a lack of knowledge of the land's history and significance, or a lack of a sense of belonging to the community. This was also influenced by some whānau facing challenges in finding the right support/networks to assist with them with the reconnection process.

Pathways to transfer knowledge.

In the context of succession planning, incorporating customary leadership values into kaitiaki roles and structures can help to promote a greater sense of shared responsibility and ownership among different generations of whānau.

By creating an environment in which younger members of the whānau can learn from and be mentored by older members who have a deep understanding of customary values, it is possible to ensure that these values are passed on and retained over time. This, in turn, can help to promote greater continuity and sustainability in the management of whenua and Taiao, as the next generation of kaitiaki is equipped with the necessary knowledge and skills to effectively manage these important resources.

There are several pathways for the transfer of knowledge between different generations of Kaitiaki:

- Establishing a junior komiti: The establishment of junior komiti provides a mentoring opportunity for the current komiti to engage with the next generation. This will help ensure the longevity and success of the whenua incorporation, by providing opportunities for knowledge transfer and leadership development.
- Hands-on experience: One of the most effective ways to transfer knowledge between generations of kaitiaki is through hands-on experience. Rangatahi can learn by working alongside elders on mahi on the whenua, such as restoration planting and preparing kai.
- Cultural history hikoi: Opportunities for whānau to learn more about the history, traditions, and values associated with the whenua, as well others in the community who may be interested in learning more about the whenua.
- Formal education: Formal education, such as courses in agriculture, business, or environmental studies, can provide younger kaitiaki with the knowledge and skills they need to manage the land effectively. This can be complemented by hands-on experience and cultural immersion programs to ensure a well-rounded education.

Opportunities for connecting and identifying whānau

The following section highlights the opportunities identified by the case-study Incorporation Komiti to connect whānau, in particular rangatahi and future shareholders, with activities and plans for the whenua.

- Developing a whānau database: To identify and connect with whānau members, it can be useful to create a database or list of current members of the whenua. This can include contact

information, whānau connections, and any specific skills or expertise that can be useful for future plans and mahi.

- Use social media platforms: Social media platforms can be an effective way to connect with whānau, especially for younger generations. Posts can be made to provide updates on plans and activities for the whenua, and to encourage korero and engagement.
- Regular communications: Regular communications such as panui/newsletters can be sent to whānau members to keep them informed about upcoming events and plans for the whenua.
- Working bees and mahi on the whenua: Working bees and other events can be held to provide opportunities for whānau to get involved with the whenua. These events can be structured to allow for participation and engagement, and to build a sense of community around the whenua.

Building the succession pipeline

The following factors were identified by the incorporations as being key in identifying successors:

- Connection to the whenua: Successors should have a strong connection to the whenua, or desire to reconnect with the whenua. This includes the understanding of the history, traditions, and values associated with the whenua.
- Willingness and commitment: Successors should be willing and committed to take on the responsibility of managing the whenua for the long-term.
- Skills and knowledge: Successors should possess the necessary skills and knowledge to manage the whenua effectively. This may include knowledge of kawa/tikanga practices, farming, mahinga/mahika kai, conservation, as well as business and financial management skills.
- Collaborative approach: Successors should be able to work collaboratively with other whānau, hapū, and rūnanga members to ensure the land is managed in a way that aligns with the broader community's goals and values.

Building a team approach

One way that whānau, hapū, and rūnanga can enable a team approach to succession is by working together to identify and cultivate potential successors. This involves identifying individuals who have the necessary skills, knowledge, and values to take on leadership roles within the community. Whānau, hapū, and rūnanga can then work together to provide these individuals with the training and support they need to become effective leaders.

Support and mentoring: This involves creating a supportive environment that encourages learning, growth, and development. By providing support and mentoring, whānau, hapū, and rūnanga can help potential successors to develop the skills and confidence they need to take on leadership roles within the community.

Communications platforms:

A sample plan was developed with the objective of supporting Incorporations and Trusts in helping whānau reconnect with the whenua, and to also share important updates and educational opportunities with the community.

Target audience:

Rangatahi and whānau members of the whenua incorporations.

Channels:

- Monthly newsletter sent to all members via email or physical mail.
- Social media platform (e.g., Facebook or Instagram) - Social media channels will be established for Pūrākaunui to provide updates to its shareholders, whānau, and the wider public about the existing work happening on the whenua.
- AGM held once a year, both in-person and online.
- Website: A website can showcase background information on the organisation, local history and stories, and activities happening on the whenua.

Messaging:

- Cultural practices and stories that are relevant to the whenua and its history.
- Updates on any mahi, such as upcoming projects or land management plans.
- Educational resources that connect the community with the whenua and its natural and cultural significance.

Engagement:

- Quarterly panui/ newsletter which will include a whānau member spotlight section where a member will be interviewed and share their connection to the whenua.

- Social media platform will include interactive elements such as surveys, polls, and sharing opportunities for stories and experiences on the whenua.
- Educational workshops and events will be designed to engage rangatahi and whānau members and include opportunities for feedback and input.

Metrics:

- Number of panui/newsletters opens and clicks.
- Social media engagement metrics such as likes, shares, and comments.
- Number of attendees at educational workshops and events.

Learnings for future engagement

The use of the 1000minds survey for our project proved to be insightful, but there were some challenges that need to be addressed in future surveys. Based on the feedback received from the use of the 1000minds survey, the following recommendations and learnings can be made:

While the tool was able to delve deeper and uncover preferences without unconscious bias, on average participants had to answer 45 trade-off questions, with some participants having 53 trade-offs to click through. This made the survey very long. To improve future surveys, we recommend reducing the number of trade-offs and communicating the importance of the survey and its purpose to participants through more channels.

Results from the 1000minds tool also showed that there were a significant portion of approximately 35% of participants who opened the survey but did not complete it. This could be due to the loss of interest because of the duration required to complete the survey. Some participants who did complete it, gave feedback that it was too long which allows us to confirm this assumption. Therefore, it is recommended that the number of variables and scenarios be reduced in future, to make the survey shorter and more concise.

It is recommended to have more free-text boxes to allow participants to share their thoughts. For one case-study incorporation, the Komiti had already kicked off some engagement with whānau, so whānau had previous opportunities to share their thoughts and vision for the whenua. However, for the other case-study incorporation, there had not been much prior engagement aside from annual shareholding correspondence; therefore, the facilitation of additional hui before sending out the 1000minds tool may have helped the engagement.

The digital nature of 1000minds meant that a technological device such as laptop or mobile phone had to be used to participate in the survey. This was a barrier for some of the older whānau which reduced participation. Therefore, it is recommended to provide alternative ways for participants to engage with the survey, such as paper-based surveys or in-person interviews.