

Maori sustainable development in the 21st Century: The importance of Maori values, strategic planning and information systems.

Garth Harmsworth

Ngāti Tuwharetoa, Ngāti Raukawa
Landcare Research New Zealand Ltd.
Private Bag 11052
Palmerston North, New Zealand
[HarmsworthG@landcare.cri.nz]

Kim Barclay-Kerr

Te Raupapa
Waikato Management School
Te Whare Wānanga o Waikato
University of Waikato
Private Bag 3105, Hamilton, New Zealand
[kbarclay@waikato.ac.nz]

Tamati Reedy

Te Pua Wānanga Ki Te Ao
The School of Maori and Pacific Development
Te Whare Wānanga o Waikato
University of Waikato
Private Bag 3105, Hamilton, New Zealand
[tamati@waikato.ac.nz]

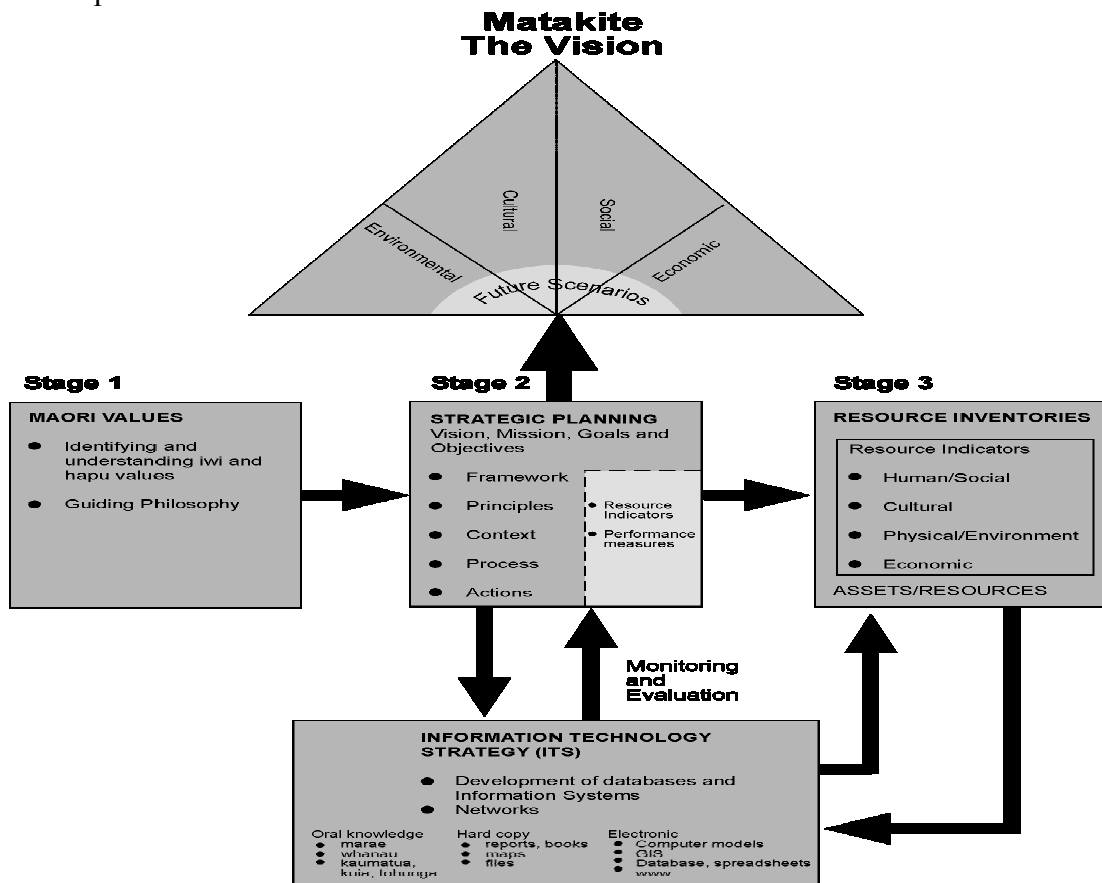
Abstract

The term ‘sustainable development’ has been widely used since the latter part of the 20th century. The concept implies economic and social development, economic growth, and environmental responsibility in order to sustain improved standards of living based on economic growth, to achieve some form of social equity, and to manage the environment in a sustainable way. Sustainable development should generally be at a rate that allows future generations to meet their needs without causing degradation of the natural environment, and should avoid economic or social decay. The concept has been debated and criticised by many as being ambiguous, untenable, and difficult to achieve, and frequently labelled part of global capitalism. But the concept provides a challenge to all of us, on how to balance economic, social, and cultural goals, while at the same time safeguarding and responsibly managing the environment for future generations. Attempts by indigenous peoples internationally to achieve sustainable development have been based on holistic approaches and frameworks that seek to balance economic, social, cultural and environmental objectives, and these provide effective models for viable sustainable development approaches. Maori Sustainable Development in Aotearoa-New Zealand is a term often used to describe a pathway to Maori autonomy, self-determination, the building of human and social capacity, as part of a strategic direction to capitalise on opportunities in the 21st century. This paper outlines research undertaken between 1998 and 2002 and funded by the Foundation for Research, Science, and Technology (FRST) in the programme “Maori Sustainable Development in Te Puku o Te Ika”, contract UOWX0005, simply referred to as the MSD programme. It focuses on the importance of determining Maori values, a vision, strategic planning and development of information systems as a holistic framework and process method to achieve Maori sustainable development.

Introduction

Maori Sustainable Development is a term often used to describe a pathway to Maori advancement, autonomy, and self-determination (Durie, 1998; Loomis, 2000). It reflects aspirations of contemporary Maori to achieve holistic development to improve well-being and standards of health, increase human and social capacity, strengthen cultural identity, manage the natural environment responsibly, provide strategies for economic growth, and capitalise on opportunities in the 21st century. This paper summarises research carried out from 1998 to 2002 to establish a framework for conceptualising Maori Sustainable Development. The resulting framework (*Figure 1*), based on many case studies, embodies iwi and hapu aspirations for social, cultural, and environmental well-being, economic activity, cultural revitalisation, and their inter-dependent relationships. Information at the core of the framework is an understanding of iwi and hapu values, aspirations and identification of social, cultural, natural environmental, and economic resources at the iwi and hapu tribal level. The framework can be used to provide a conceptual generic model to identify the steps and procedures any Maori organisation can use to identify, articulate, and implement a vision based on aspirations, and to develop strategies for achieving sustainable development. It is within this context that the development of resource inventories and information systems becomes essential to identify and manage resources, identify and build capacity, and monitor and evaluate achievement goals. The framework and model also has application to any organisation or company that intends to build a “company culture” and to set goals much wider than those that focus solely on economics.

Figure 1: A framework and model for achieving tikanga-based Maori sustainable development



Maori holistic development

Most Maori organisations to date, as required under New Zealand legislation, have focused mainly on financial or economic reporting (Loomis, 2000). In the last decade, however, there has been an increasing trend internationally and nationally for many organisations and companies to expand their reporting to encompass social, environmental and financial performance, usually termed ‘triple bottom line’ reporting (Elkington, 1998). Historically, most decision making by Maori organisations has always been holistic, largely because of the need to consider a wide range of political, cultural, social and environmental objectives. Such decision making would be limited if based solely on economic factors. Because of the historical, cultural and political contexts within which Maori organisations are often set, many are increasingly interested in assessing their performance from such a perspective, as well as an economic one (Durie, 2000; White, 2000; Potiki, 2000; Loomis, 2000). This could be regarded as developing ‘quadruple bottom line’ reporting, when distinct cultural objectives are also considered. A cultural and social assessment is essential to identify the cultural health and condition of Maori wellbeing in Aotearoa-New Zealand, and to build a strong cultural, economic, and social base to capitalise on future development opportunities whilst maintaining cultural integrity and resilience (Durie, 1998 and 2000; Winiata, 2000). This research has focused on strategic planning and assessment carried out to date by iwi and hapu, but has relevance as well to urban Maori who still identify with iwi and hapu.

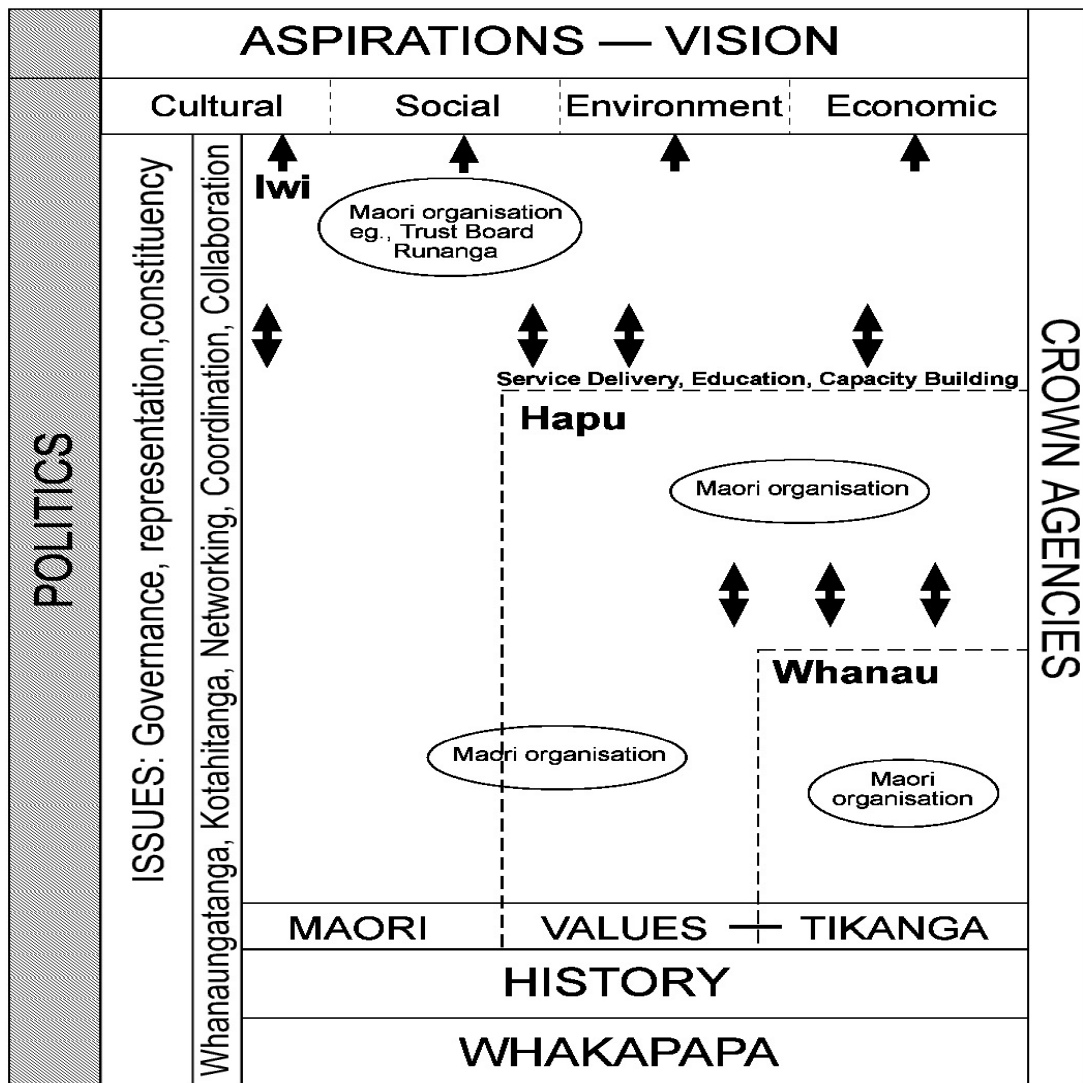
Strategic planning approaches have been developed by a large number of iwi and hapu throughout Aotearoa-New Zealand, and a large number of strategic planning documents have been produced. One of the first groups to use a holistic strategic planning approach, which identified a collective vision to achieve social, cultural, physical and economic goals, was Ngati Raukawa centred in the Manawatu–Fielding–Horowhenua–Kapiti districts. Their early planning initiatives in the 1970s were led by Dr Whatarangi Winiata along with several other tribal leaders responding to concerns about the increasing urbanisation of Maori that was weakening the institutional and cultural fabric of the tribe. The 1975 approach “Whakatapuranga Rua Mano” (Generation 2000; Winiata, 1975, 1988 and 2000; TROR Inc. 1990), set out to create a vision and strategy to map how Ngati Raukawa should move into the 21st Century, and the tribal goals it sought to achieve.

Many Maori organisations today have to administer large amounts of assets on behalf of, and for the general benefit of their constituents; to provide services, and to represent their constituency in a range of political, social and economic forums (*Figure 2*). This responsibility means the organisation must have a clear purpose and direction and explain its present activities and future plans to its constituency and beneficiaries. More recently, many organisations have had to revisit and clarify their functions, role, and direction.

Organisations, such as iwi and hapu authorities, currently see their strategic direction in five key areas: economic, cultural, social, political, and overarching, where the overarching area might embrace all objectives to achieve self-determination, mana motuhake, autonomy or self-governance. Many iwi authorities, such as iwi trust boards or runanga, see an increasing role in coordination and facilitation with those organisations and individuals affiliated to it, sharing the same whakapapa, or where coordination or partnership with other organisations is essential to achieve common

goals (e.g., Crown negotiations, resource and economic development, treaty claims process, fisheries). Strategic goals and objectives are seen as an interlinked interdependent system providing a comprehensive and multi-tiered iwi and hapu planning framework (Figure 2). To achieve this strategic direction, Maori organisations, especially at the iwi level, are often structured and organised into programme areas such as: corporate, commercial or economic, service delivery, and iwi, hapu, and whanau development. The present strategic planning carried out by many iwi authorities is therefore intended to be culturally, economically, and politically focussed, progressive, participatory, and ongoing.

Figure 2: In contemporary society, Maori organisations need to define their role carefully alongside others to achieve greater iwi, hapu, and whanau aspirations



© Garth Harnsworth, Landcare Research 2002

Research methodology

To develop and refine a framework for conceptualising Maori sustainable development the research team worked with four core iwi authorities in the central North Island between 1998 and 2002. These were Tauranga Moana Maori Trust Board (TMMTB), Tauranga; Te Arawa Maori Trust Board (TAMTB), Rotorua;

Raukawa Trust Board (RTB), Tokoroa; and Te Runanga o Ngati Porou (TRONP), Gisborne. All the participating iwi authorities were at different stages in their strategic planning, with TRONP and RTB having produced a large number of planning documents during the past 12 years following a number of hui with their constituents (TRONP 1993; 1998a, b, c; 2000a,b; RTB 1998 and 2000). TAMTB and TMMTB had just started strategic planning but both had participated in several earlier hui and forums to discuss future direction and economic opportunities (Te Arawa Economic Summit 1998³). Along with planning documents and file notes from the core iwi authorities, the project reviewed and analysed a large number of additional iwi planning documents for content, structure and conceptual approach. These included examples from Te Runanga O Raukawa Inc. (TROR Inc., Otaki, Palmerston North) and Te Runanga O Ngai Tahu (TRONT, Christchurch) who were approached for information on strategic planning and engaged in discussion on Maori sustainable development (Whakakohuri Whenua, 1999; TROR Inc., 1990; Winiata, 2000; Emery, 2000²; Marama Te Ao, *pers comm.*; TRONT 1995 – 2002; White, 2000; Potiki, 2000). Most of the strategic plans analysed had generally started with identification of values and principles, aspirations and a vision, and then moved to a discussion of strategic direction to identify and achieve a range of social, cultural, environmental, and economic outcomes and goals. Several commonalities in approach and process were evident from previous iwi and hapu documents, providing a basis, in the MSD research, for the development of a framework for Maori Sustainable Development (Loomis, 2000). These also helped develop and define questions for structured personal interviews, focus group, and hui/workshops.

Participatory research was carried out with the four core Maori organisations from 1998 to 2002. Personal interviews, focus group hui, and general hui/workshops were used to obtain background information on each Maori organisation and its constituency, identify Maori values and aspirations (for the organisation, constituency and greater iwi or nga hapu), and help determine its future role and strategic direction in this context. All interviews followed a kaupapa Maori research methodology (Pene, *pers. comm.*). During the MSD programme, previously documented information was made available to the research team and accordingly summarised and referenced. Follow-up discussions were held with tribal representatives, and an extensive review and analysis was carried out of reports, file notes, iwi strategic plans, and papers for the core iwi authorities. The following six generic questions were used in interviews and as a guide for discussion:

- *The Current situation?* (e.g., organisational history, current situation, organisational structure, how does your organisation currently operate, what is its constituency, the people it serves or represents, what resources or assets does it have available to it, or have access to, in terms of current human–social, intellectual, physical, cultural, and economic resources?).
- *Challenges facing your organisation in the next 25 years?* (e.g., what strategic direction is planned for the next 5, 10, 25 years, future developments, are there issues, problems associated with this new direction, what are some of the main challenges your organisation foresees in the next 25 years?).
- *Values?* (e.g., what are your key iwi and hapu values, cultural values used in developing principles and a guiding philosophy, cultural and ethical values, which become part of a guiding philosophy or set of principles for future strategic plans and business/commercial strategies, how do these iwi and hapu

values manifest themselves, or translate into objectives for sustainable economic development, how do these values change the philosophy and behaviour of your organisation, are there competing conflicts or constraints when planning economic development based on values and guiding principles?).

- *Vision statement?* (e.g., in what direction does your organisation see itself heading in the next 25 years, is its present organisational structure or governance appropriate and consistent with this direction, what will your organisation and governance look like in the future, what will be its role, who will be its constituents, beneficiaries, what will the constituency look like, what will be its economic base or core business, what activities or services will it be involved in, what areas of sustainable economic development will it be involved in?).
- *A mission statement?* (e.g., what is the mission your organisation wants to drive or facilitate, fulfil in the future, a mission for the whole iwi or hapu constituency (tribal rohe), or certain beneficiaries, how will the organisation implement this mission, what key objectives will achieve the mission, is the mission consistent with the vision?).
- *Strategic objectives?* (e.g., what are the strategic objectives, or specific courses of action required to enable your organisation to achieve its vision and mission, strategic goals, how will the success of these objectives be measured, how will these strategic objectives be made operative, how do the strategic objectives contribute to sustainable economic development?).

Results

Information summarised from hui and workshops, personal interviews, focus group hui, along with analyses of planning documents, indicated the significance of and requirement to take iwi and hapu values into account when planning Maori sustainable development and economic development strategies (Loomis *et al.* 2000a, b; Loomis *et al.* 2002a, b). In most situations, the word ‘development’ was interpreted in many different ways but usually was used to support ideas of: “advancement”; “progress”; “moving forward”; “to build a sustainable, viable, economic base for iwi, hapu, and whanau”; “sustainable management of the natural environment”; “realising a vision”; “turning aspirations into reality”; “bringing about cultural enrichment”; “cultural revitalisation”; “cultural integrity”; “development to make a profit”; “establish businesses, cooperatives, joint ventures”; “to share wealth”; “building economic prosperity to be shared”.

Three main stages were recognised as providing the basis for a Maori sustainable development framework (Harmsworth *et al. in prep*), (*Figure 1*):

- Identifying and understanding Maori values;
- Determining the iwi or hapu vision, the mission, and establishing strategic goals and objectives, the strategic planning process;
- Development of resource inventories and planning information systems to support strategic planning and to assess performance.

Stage 1: Identifying and understanding Maori values

Maori value themes and concepts, based mainly on traditional values, were described as highly relevant in modern day Maori society and fundamental for forming

principles and a guiding philosophy for culturally based sustainable development. Iwi and hapu values form the basis for developing principles, protocols, rules, ethical, moral, and cultural standards, standards of behaviour, and guiding philosophies for planning Maori sustainable development. Working in combination to form a solid foundation and framework for tribal development and sustainable economic planning, these values embrace a wide range of factors – social, cultural, physical, economic – that should be taken into account in strategic planning and that provide the basis for developing the appropriate goals and actions within a strategic plan (*Figure 1*).

Many traditional iwi and hapu values were documented during interviews and hui, and from reviewing and summarising previous iwi and hapu reports and file notes. The most commonly occurring or generic values were:

Iwitanga: (e.g., Ngati ...tanga, Ngai...tanga, Te...tanga): expression and celebration of those qualities and characteristics that make an iwi or hapu unique and underpin a shared whakapapa, history and identity;

Whakapapa: genealogical descent, heredity, lineage. Whakapapa is the ordered relationship, structured lineage, and descent from the universe, through atua, to land, air, water, and people;

Tino Rangatiratanga, Rangatiratanga, Mana Motuhake: acts of authority and power;

Mana Whenua, Mana Moana: legitimacy to control, manage, and administer land, water and marine resources;

Manaakitanga: reciprocal and unqualified acts of giving, caring, hospitality;

Arohatanga, Aroha: care, love and respect;

Awhinatanga: assist, help, care for, give assistance and help to others;

Whanaungatanga: the bonds of kinship that exist within and between whanau, hapu, and iwi, belonging, togetherness, relatedness;

Whakakotahitanga, kotahitanga: respect for individual differences and the desire to reach consensus, unity, solidarity;

Koha, Whakakoha: acts of giving;

Tau utuutu: acts of always giving back or replacing what you take or receive, reciprocity;

Whakapono: act of believing or having faith and trust in others, or in a system or organisation;

Wehi: reverence; act of being in awe;

Turangawaewae: having a place of standing, belonging, and security;

Kaitiakitanga: stewardship or guardianship of the environment;

Kokiri: an act of going forward, being competitive;

Te Aoturoa: emphasises the interdependence with the natural environment, the cosmological relationship and responsibilities of Maori in relation to the whole and parts of the environment;

Taonga tuku iho: (e.g. *te reo Maori, wahi taonga, taonga whakairo*): the notion of recognising and holding on to the treasures and knowledge passed on from ancestors. Includes preservation of taonga to look after, house, protect, and manage taonga, such as natural resources, te reo Maori, and whakairo on behalf of iwi, hapu, and whanau;

Wairuatanga: the spiritual dimension.

Together, these components emphasize the inter-dependence of the spiritual, cultural, and physical environments, the individual, and the social group. Tikanga involving these values gives rise to the Rangatiratanga for the whanau, hapu and iwi. As concepts, principles, and guiding philosophies they can belong to the past and to the future. These values shape the culture and behaviour of an organisation, its responsibilities and obligations, the way it acts on behalf of its constituency, and the way it interacts with its constituency for some common purpose. It can be argued that some organisations, such as companies, do not have a culture, but an increasing number of organisations have in the late 20th, and now 21st century shown commitment to developing an “organisational culture” and defining the basis for this, through mechanisms such as company statements of intent, mission statements, principles and “triple bottom line reporting”.

Stage 2: Maori strategic planning processes

The MSD research summarised and compared a large number of iwi strategic plans to:

- identify the purpose for strategic planning;
- identify the process, in terms of steps or procedures;
- identify the structure, content or framework (e.g., parameters, terms of reference, kaupapa, components);
- produce a generic Maori Sustainable Development model, showing the steps, structure, and interlinked components, that could be used by any Maori organisation at the iwi, hapu, or whanau level.

Many Maori organisations have discussed or used strategic planning approaches. These approaches usually include a collective vision – based on constituent aspirations, a mission, a set of goals, a set of strategic objectives, and performance measures. Results from the MSD research indicated that to date: iwi and hapu strategic planning frameworks and processes show a high degree of consistency; usually articulate a holistic framework to achieve multiple outcomes; and can also provide a generic framework, process, and model that other Maori organisations can use for their strategic planning. Iwi and hapu values are usually central to planning Maori sustainable development and all other components are interlinked. An iwi or hapu strategic plan sets a direction for Maori sustainable development and provides an agenda for achieving aspirations, through a set of practical steps (i.e. goals and objectives). Most iwi planning documents stressed the need to evaluate and review performance through the use of measurements and indicators. From review of a large number of iwi planning documents, the key reasons given for strategic planning were to:

- provide a vision, a sense of purpose, and a direction for a Maori organisation;
- determine the role and function of a Maori organisation in relation to the aspirations of its constituency and develop a collective vision on their behalf;
- ensure alignment between a Maori organisation’s role, function, and structure, its longer term strategic objectives, and the expectations of its constituency;
- provide models so that issues concerning governance, organisational structure, and representation can be addressed;

- identify a process for achieving tino rangatiratanga/mana motuhake (self determination) for a Maori organisation and its constituency;
- identify priorities for service delivery strategies;
- think ahead strategically in a rapidly changing environment/world so that an iwi or hapu authority is able to seize opportunities and minimise risks;
- establish priorities for utilising and sustaining resources;
- establish systems for measuring and evaluating performance;
- provide a leadership role in Maori sustainable development.

Once strategic planning had begun, it was usually focussed on defining key priority areas in which further subdivision into goals and objectives was subsequently carried out. Key priority areas for a Maori organisation could include: communication, involvement of beneficiaries, service delivery, policy development, research, funding, economic development, cultural development, Treaty of Waitangi claims, and relationships or partnerships with local or central government. From a review of 11 iwi organisations, their principal function was found to be a combination of:

- provision of strategies for economic and people development, obtain and manage an economic base, and promote economic development within a region or district;
- promotion of the retention, sustainable use and development of tribal land and other natural resources;
- promotion and support of the interests and representation of iwi, hapu, and whanau to central and local government and other public authorities;
- promotion and coordination of education and training for iwi, hapu and whanau;
- promotion and development of cultural activities for iwi, hapu, whanau;
- promotion of employment for iwi, hapu and whanau;
- promotion of ideals of good health and caring to iwi, hapu and whanau;
- promotion of improvements in housing conditions and housing situations appropriate to nga uri;
- promotion and fostering of cultural identity and pride amongst all tribal members.

The stated purpose, intent, and function of a Maori organisation will determine the way the strategic planning proceeds and influences the development of goals and objectives. It provides the basis for measuring the performance of that organisation by examining and evaluating results and actions over a period of time, and by examining response from constituents or beneficiaries. Often underpinning these principal functions is a statutory requirement for a Maori organisation, such as a trust board or runanga, to “administer its assets for the general benefit of its constituents or beneficiaries”.

A set of specific objectives is often developed within key areas or priority areas, depending on the agreed role of the organisation. Each objective needs to be specific, achievable, measurable, researched and time-framed. This is an integral part of the planning process to identify respective roles, strengths and weaknesses, determine key goals, consolidate knowledge and experience, clarify the mission, assess the opportunities, and develop strategies to achieve the vision.

In line with any organisation's movement into a new phase, a review of the organisational structure and processes is essential during strategic planning. Issues of representation, accountability and communication (e.g. collectively addressed through governance issues) are often highly significant for iwi and hapu in terms of having appropriate organisational structures and representation in place to implement and carry out goals and objectives successfully. It is important that strategic planning is as participatory as possible and conducted through hui and workshops at several venues, such as marae, throughout both the rohe and in other parts of the country where constituents are represented. The credibility and mana of an organisation such as a runanga or trust board is often measured by its relationship with its constituents and support given by groups such as Kaunihera, marae, whanau, and hapu within the tribal rohe (*Figure 2*).

Planning for holistic self-determined development

In this section we examine and summarise the most common strategic planning approaches and steps used by a number of Maori organisations, including the core group of four iwi included in the MSD research of 1998 to 2002.

Since 1975, many iwi and hapu have developed a tribal vision and a set of strategic planning objectives, often adapted from western approaches to planning. These approaches, however, have been commonly based first on defining traditional values (summarised in *Stage 1* and *Figure 1*) as a basis for developing organisational principles. The planning is multi-tiered and holistic in that key priority areas and goals are designed to achieve multiple outcomes including cultural, political, social, economic and natural environment. Most iwi and hapu have used a common process for their planning, which has followed six key practical steps:

- Identifying and understanding traditional iwi and hapu values to establish guiding principles;
- Developing a collective vision based on constituent aspirations;
- Agreeing on a mission (to determine the role and governance structure of the organisation for achieving a greater "iwi" vision);
- Identifying broad key priority areas and strategic goals (to achieve the vision);
- Developing detailed objectives, actions, results and outputs (a number of objectives or actions for each goal);
- Developing performance measures for review, monitoring, and evaluation of what is being implemented – includes measures such as performance targets and indicators (are the objectives being met? accountability? responsibility for the actions and objectives? quality of outcome?).

Two main levels of consultation and participation were identified in the planning approach: The establishment of a broad iwi or hapu planning framework (i.e. defining values, principles, vision, mission, broad priority areas, broad goals); the establishment of more detailed strategic planning initiatives (i.e. strategic objectives, actions, outputs, performance measures):

The following stages and terms are defined:

Vision: encapsulates future aspirations, a dream, a whakatauki or pepeha for an iwi, hapu, or whanau, and gives a sense of hope, focus, direction and purpose for achieving self-determination, tino rangatiratanga or mana motuhake. A vision can be described wholly or complemented by certain whakatauki or pepeha.

Mission: states a course of action and purpose for the organisation to achieve the vision, and provides some organisational direction and a role for the iwi or hapu authority to achieve what is usually a more collective vision.

Goals: used to provide focus and establish priorities, procedures, and protocol for an iwi, hapu or whanau, on what is most important, and what needs to be accomplished to reach the vision. They are usually broad overarching statements to identify key areas in line with either iwi, hapu, or whanau aspirations.

Strategic planning objectives: state a specific action, direction, and time-frame to achieve a goal and contribute to a vision. Objectives become part of a series of progressive or temporal steps towards completion of goals.

Actions or outputs: may accompany each planning objective above and should be a measurable achievement. A person or organisation needs to be clearly identified as having responsibility for delivering a stated action or output. Such an action could be to: hold four hui; establish a database; send out two newsletters or panui; organise and hold a workshop; complete a report; carry out a review; research whakapapa and document as a diagram; prepare a planning report on ...; hold a wananga; hold a festival; and outputs can be reports, files, hui, databases. All these would need to be completed in some form, by some date, and to a required standard.

Performance measures: indicators or targets that can be used to ascertain if an action or responsibility has been completed on time and to a satisfactory standard. They form measurable milestones necessary for a tribal authority to identify whether the planning objectives are being achieved within a defined or measurable time-frame, whether they are taking the iwi, hapu, or whanau towards the desired vision, to check completion of prescribed actions, to show whether the planning objectives are being met in accordance with the original broad set of objectives, and to measure the success, standard, or effectiveness of each objective. Such measures ascertain whether the action or output was actually carried out; whether letters were sent, hui held, reports presented, databases developed, discussion papers circulated; whether matters were carried out to a satisfactory standard, on time, whether they were successful and to what degree.

Strategic plans should be clearly organised and understood by constituents. They should be structured into sections on: underlying Maori values and guiding principles, a vision statement, a mission statement; goals or priority areas; planning objectives and actions; evaluation and performance review. When completed, a draft plan should be widely circulated for comment and modified as required. The strategic plan for an iwi or hapu should be a living or dynamic document that responds to change

and opportunity. It is not, therefore, fixed in time. It is important, once the draft plan is agreed, that governance and structural issues be debated and addressed, and that new organisational structures for delivering the objectives and achieving the vision be incorporated in the final plan, and then actioned for implementation. Most strategic plans are reviewed every 5 to 10 years depending on political, environmental and developmental circumstances, and may require structural change, especially when new opportunities and challenges arise.

What makes a Maori organisation's strategic plan different?

The very nature of a Maori organisation, its responsibilities, function and purpose, make it comparatively different from most non-Maori organisations (*Figure 2*). One of the main differences is the need to achieve multiple outcomes and the responsibilities to constituents based on ancestry, iwi and hapu values, politics, and history. This is typically reflected in the organisation's planning, which often comprises much broader goals and objectives covering social, cultural, natural environment, political, and economic areas. These holistic characteristics embrace the need to:

- consider social, cultural, economic, physical, political, and historic factors (e.g. an ordinary business is usually concerned mainly with economic and limited physical and human factors; a Maori organisation needs fully to appreciate and understand tikanga, and political and historic factors);
- deal with a larger constituency beyond its organisational structure and constituency, and work with all people and agencies (*Figure 2*);
- take into account land and water resources and other taonga in and outside the rohe, in addition to the immediate organisational assets;
- provide leadership to iwi, hapu, and whanau;
- provide a high level of service while maintaining financial viability;
- be active in the management and development of resources and assets for the greater iwi rohe;
- maintain cultural integrity and follow tikanga in all its actions and behaviours;
- be accountable to the greater iwi constituency in and outside the rohe; needs to have a clear vision for the iwi as a whole, not only the constituency represented by the organisation;
- work through different political levels from national to local.

Stage 3: Developing resource inventories and information systems

The strategic plan provides the basis and context for the development of tribal resource inventories and information systems (*Figure 1*). Because of the nature and purpose of Maori organisations, and the multiple outcomes they must achieve, their resource inventories and information systems need to include, or have access to, information much wider than financial (Winiata, 1998; Loomis 2000; Emery, 2000²; Potiki, 2000). A number of Maori organisations since the late 1980s have developed systems that store information on taonga and cultural resources (Harmsworth, 1995, 1997a,b, 1998; Winiata, 1988), as well as on social, health and environmental factors. Loomis (2000) referred to the development of resource inventories as a way for tribal organisations to take stock or develop tribal accounts of their available resources for sustainable development. This would also become the basis for future monitoring towards tribal goals and outcomes. Strategic planning (*Figure 1*) is therefore essential

for identifying the information needs of iwi and hapu, and for coordinating information use and requirements between Maori organisations and non-Maori organisations. Strategic planning is also the prerequisite for developing a tribal information technology (IT) strategy (*Figure 1*), that may include internet use, communication, Geographic Information Systems, computer models, use of statistical data and oral transfer of knowledge, use of matauranga, and intellectual property rights.

Resource inventories may take several forms, and may be simple or very complex. Usually they contain organised and often categorised lists of information, such as cultural resources, natural or environmental resources such as land and water, taonga, human resource capacity such as skills and expertise, statistical social-demographic information, health statistics, social statistics, economic and financial information and assets. The 'information system' is the "store-house" for all this resource information, and while it need not be centralised, it does need to be networked. The resource inventories and information systems are used in conjunction with strategic planning to identify resources, stocks, assets, and the capacity available to an organisation or constituency for carrying out and achieving Maori sustainable development. Resource information is also used to monitor and evaluate the outcomes stated in the strategic plan. It may be used either by an organisation to monitor itself or outside agencies, or by outside agencies (e.g. the Crown) to achieve, better, more targeted service delivery, better education systems, sustainable land and water management, capacity building, or economic development.

An example of an early simple resource inventory is given in the following paragraph which is included in Asher and Naulls (1987):

In 1857 in the Bay of Plenty, Taupo, and Rotorua, Maori (about 8000 Maori inhabitants) had upwards of 3000 acres of land in wheat, 3000 acres in potatoes, nearly 2000 acres in maize, and upwards of 1000 acres in kumara. They owned nearly 1000 horses, 200 head of cattle, 5000 pigs, 4 water power mills, and 96 ploughs, as well as 43 coastal vessels averaging more than 20 tons each, and upwards of 900 canoes", and in 1860 ..."; "Maori of eastern Canterbury (i.e. a population of 480 at the time) owned 205 horses, 214 head of cattle, 197 pigs and had 51 acres of wheat and 56 acres of potatoes under cultivation.

A modern resource inventory will look very different from this early historic example. It will usually consist of a large number of useful *resource indicators* that should reflect the information required (e.g. based on the strategic plan), not just the information presently available to a iwi or hapu. Indicators are usually organised or categorised into appropriate groups or classes. In the MSD research, a large number of key *resource indicators* (*Table 1*) were identified by reviewing current resource inventories already developed by iwi and hapu in Aotearoa-New Zealand, by adapting the inventory developed by Winiata in 1998 (Loomis, 2000), by reviewing international literature on resource and environmental indicators, from discussion with many individuals, and from summary information with the four participating iwi authorities. The current list of *resource indicators* (*Table 1*) were grouped into four main classes – human/social, cultural, physical, and economic – to provide a comprehensive basis for any Maori organisation wanting to develop their own

resource inventories and build tribal information systems. The following inventories are designed to promote discussion, further development, adaptation, modification, and to meet the needs of particular groups. They are by no means a full and exhaustive list. The MSD research programme *resource indicators* are grouped accordingly (*Table 1*) into:

- *Human/Social*: understanding human resources, people resources, human capital, human capacity, human capability, he tangata he tangata;
- *Cultural*: understanding cultural resources, cultural vibrancy, cultural integrity, Maori values, tikanga Maori;
- *Physical*: understanding physical resources, natural resources, access to natural resources, physical state and condition, land and coastal characteristics, condition and use, mana whenua, awa, moana, etc;
- *Economic*: understanding available economic resources, economic capital, investments, economic potential.

Indicators may be categorised and classified into more complex resource inventories with several structural parts, for example, numerous categories or sub-groups if required. Most importantly, the indicators give a measure of resource capacity – human-social, physical, cultural, economic – to undertake certain activities or certain lines of sustainable development or economic development. They can also be used to measure iwi and hapu health and wellbeing (Winiata 1998, 2000), and cultural identity and integrity (Durie 1998; White 2000; Potiki 2000). Cultural health indicators from *Table 1*, can include, for example, number and condition of marae, number of fluent te reo speakers, number of people in wananga training, some assessment of matauranga, access to, and condition of mahinga kai sites, etc.

Table 1: Key resource indicators broadly organised into the four main groups. **Part 1:** Human

1. Human/Social
Population figures for iwi and hapu; Numbers represented, the constituency of an iwi authority or Maori organisation; Numbers living in tribal rohe; Numbers living away from area, rohe, urban/rural; Age statistics, age profile; No. of unemployed; No. of employed; Average family size, whanau size; Average and median family income; Socio-economic profile; Demographic profile; Religious affiliation; dominant religious affiliation for marae and hapu; Health statistics; Number of Maori health professionals/types for iwi/hapu; Range of people skills, range and type of academic qualifications, range of trade qualifications, no. of people with tertiary qualifications, no. of people with business expertise, no. of people with managerial and/or administration skills, no. of people with tourism skills, no. of people with environmental skills, no. of people with land-based skills, no. of people with science and/or technology skills, no. of people with expertise in horticulture, forestry, and agriculture, no. of people with expertise in the fishing industry or aquaculture; No. of affiliated organisations and komiti's, and type (e.g. marae, Maori industry groups, Maori networks).

Table 1: Key resource indicators broadly organised into the four main groups. *Parts 2 & 3:* Cultural and Physical

2. Cultural
<p>No. of and condition of marae; No. of kaumatua/kuia; No. of Tohunga (experts) and people authoritative on tikanga and kawa; No. of authoritative practitioners willing to share knowledge (e.g., te reo, waiata, karakia, whakairo, rongoa, raranga, whatu, whakapapa); No. of people who still practice oral transfer of tribal knowledge; No. of people conversant or with skills in matauranga Maori; No./ proportion of spiritual leaders; No. of cultural training courses offered; No. of cultural training centres; No. of cultural training centres run solely by Maori organisations/individuals; No./ proportion of fluent speakers of te reo Maori; No. of people learning te reo Maori; No. of tamariki in kohanga reo; No. of tamariki in kura kaupapa and bilingual units; No./ proportion of people who have established principles of tikanga and kawa in business; No./ proportion who see importance of Maori values in Maori development and business; Inventories of wahi tapu; Inventories of Maori cultural sites; whakairo; Inventories of taonga; Inventories of cultural and natural resources; Cultural inventories of vegetation (e.g., native bush taonga, indigenous forest, indigenous scrub, wetlands, sand country, etc.); Cultural inventories of medicinal plants (e.g., rongoa); Cultural inventories of plants for weaving (e.g., raranga, whatu); Cultural inventories of freshwater (lake and rivers), geothermal, and marine environments; Information on tribal history; Waitangi tribal reports; records of whakapapa; no. of books on tribal history and whakapapa; no. of manuscripts on tribal history and whakapapa.</p>
3. Physical
<p>Total area of land holdings, coastal areas for iwi, trusts, etc.; Location of land holdings, coastal areas, moana; Location of land blocks, freshwater and coastal areas, under Treaty claim; Present land-use for iwi rohe and for land blocks, trusts etc.; X Location and area of land-use types (e.g., agriculture, farming, horticulture forestry, other); Physical land type/characteristics of land resources (e.g. landforms, soil class, soil type; soil properties, slope, land-use capability (LUC), etc.); High class land; Climate; Area of urban versus rural land, land zoning; Land value, \$/ha; Inventories of land-use (e.g., dairying, beef and sheep, horticulture, forestry etc.); Production forestry; Inventories of freshwater (lakes and rivers), geothermal, and marine environments (e.g., total species, type, habitat, ecology); Access to, and/or management/policy of land (e.g. all land, forestry, urban, DOC estate, Maori land blocks); Access to, and/or management/policy of freshwater (lake and rivers), geothermal, and marine environments; Inventories of natural resource taonga; inventories of native bush (indigenous forest); inventories of wetlands, no. of wetlands; culturally significant plants; inventories of rock types/stone, geothermal; Access to, and/or management/policy of natural resource taonga: (e.g. ngahere, indigenous forest, land, geothermal areas, lakes, coastal, intellectual property rights, wahi tapu).</p>

Table 1: Key resource indicators broadly organised into the four main groups. **Part 4:** Economic

4. Economic
No. of Maori businesses/services with links to iwi authority, Maori organisation; No. of iwi businesses/services owned, managed, administered; Maori land trusts or other trusts and type of organisation (e.g. Ahu Whenua Trusts, Whanau Trusts, Putea Trusts, Incorporations, Land Komiti's); Total area of Maori freehold land; total area of Maori land; no. of owners/shareholders/ beneficiaries for each land block; Industry type, range of industry; Farming (e.g. no. of stock, type of stock, su/ha); Total properties; land holdings; buildings; rental properties; Investments; Statement of financial performance; total or net assets; fixed assets; non-current assets total debts or total liabilities; expenses; equity; shares; income generation; sources of income; Cash reserves/surpluses; Access to capital (i.e. examples/barriers); Expenditure on training and development; Other natural resource assets/natural resource inventories and/or accounts; No., condition, and use of marae; Areas under Treaty Claim; Fishing interests (Kai moana).
Note: Full references and a location address should be provided for each resource indicator to identify where resource indicators came from, to acknowledge source and intellectual property, and to provide information on any access or confidentiality requirements.

For each key resource indicator it is important to write down information on:

- the information required, the key resource indicators;
- the geographic area they cover;
- where the information is presently located, its source;
- access, availability, confidentiality and property rights;
- the form the information is in and its application or end-use.

Table 2 shows the additional information that should be collected for each *key resource indicator* (*Table 1*) and how it should be organised (Loomis *et al.*, 2000 a, b; Loomis *et al.*, 2002 a, b). A resource inventory can then be used to identify and locate the resource information required to check the feasibility and viability of goals and objectives stated in the strategic plan, and to monitor tribal or organisational programmes effectively, e.g. health statistics, area of land resources, number of people with certain skills. It would be difficult for a Maori organisation to go into a certain line of sustainable development without the underpinning resources or skills to do so.

From the indicator lists, information such as quantities, proportions, and measures from resource indicators can be used to: identify where capacity is at present; where capacity is limited (e.g. human skills); what needs to be increased; what needs to be strengthened; what are major assets and what are potential assets. The inventories therefore can identify “resource gaps” or areas where there is a need to “better manage” resources, “develop” resources, or “buy in” resources to support a particular sustainable development or economic opportunity.

Table 2: Recording and collection of information on resource indicators

Information required for each resource indicator	Example
1. Information required (resource indicators)	Resource indicators; information required; what types of information should be listed and categorised in the resource inventory; the recommended information for use in a Maori resource inventory.
2. The area covered	The spatial extent, the area the information presently covers, or the statistical coverage. Is it rohe, district, regional, national, or just local information? This provides information on the resolution, detail, and/or scale of information.
3. Where information is presently located	Where does the information presently reside, where is it housed, stored, who owns it?
4. Access (property rights)	Who is allowed access to it? Confidentiality: what intellectual property rights are placed on the information, and what level of confidentiality or sensitivity is placed on the information; licence agreements: what is the cost, what information is already in the public domain, and what is not?
5. Form/Applications	What form is the information presently in? Oral knowledge – e.g. kaumatua, kuia, iwi and hapu representatives; Hardcopy – e.g. books, publications, papers, theses, reports, files, records, maps; Electronic, computer database – e.g. database files, records, spreadsheets, GIS, internet data, www Application: Use and application - How could information be stored in a database and how can GIS be used to plan Maori economic development?

Tribal information systems

The recording, collation, archiving, presentation, and analysis of relevant information provides the core of any tribal, iwi or hapu information system. This may include historical information, photo archives, taonga collections, and Treaty claim reports. Organised resource inventories, classifications, frameworks, and oral knowledge are important components of these information systems, especially for strategic planning (Table 3). It has to be remembered that an information system can also take the form of people, such as kaumatua (Table 3). The key is coordinating information and knowledge for the iwi or hapu, constituency or a defined group, tribal, or geographic area. Examples of information systems may include development of spatial information systems such as geographic information systems (GIS), (Figure 3; Harmsworth 1995, 1997a, b, 1998), wananga, cultural inventories (Winiata 1988), statistical databases such as census data for a tribal rohe or region, and population models (Iremonger & Scrimgeour 2002).

Once stored in an information system, the information can be disseminated to or accessed by constituents through oral transfer of knowledge (e.g., wananga), reports, papers, tables, maps, graphics, spreadsheets, and web sites, giving greater tribal access to information and knowledge (Table 3). Information listed in resource inventories is essential for planning Maori sustainable development, cultural and social policy, environmental management and policy, business development, and for identifying economic opportunities.

Table 3: Form and application of resource information

Type or form of knowledge	Examples
Oral knowledge	kaumatua, kuia, iwi and hapu representatives
Hard copy	books, publications, theses, papers, reports, files, records, maps
Electronic/computerised	database files, records, spreadsheets, GIS, internet data, www

Summary

Resource inventories and information systems are vital to the success of holistic development (Loomis 2000). They provide information on:

- Resource availability: What resources exist, where, in what form, are they accessible are they usable resources or assets, what protocols or conditions may affect their use?
- Holistic development: Can the resources be used to achieve long term goals and objectives, and move an iwi, hapu, whanau or Maori organisation towards its desired vision or aspirations?
- Resource gaps: Are there other resources the organisation or constituency needs to achieve goals and objectives, and fulfil the stated vision? Resource inventories often identify gaps or weaknesses in an iwi or hapu's ability to fulfil its vision and objectives.
- Monitoring outcomes, performance review: Can the resource information be used as indicators to measure an organisations progress towards achieving goals and objectives, and is it moving towards the stated vision or away from it? Is it on target or does the strategic plan need to be reviewed?

For each key resource indicator it is important to write down information on:

- the information required, the key resource indicators
- the geographic area they cover
- where the information is presently located, its source
- access, availability, confidentiality and property rights
- the form the information is in and its application or end-use.

Translating Maori values into actions

With a holistic framework established (Figure 1), made up of values or principles (i.e. a guiding philosophy), a strategic plan, and a resource inventory or information system, the building blocks are in place to determine whether a Maori organisation can deliver stated goals and outcomes. This is also the time to question the role of an organisation, and its wider constituency, for achieving holistic (i.e. multiple) sustainable development outcomes and a vision. Several questions can be asked at this point:

- How do the previous documented iwi and hapu values translate into a form that can be used to plan for and achieve Maori sustainable development?

- How do the previous documented iwi and hapu values translate into a form that can be used to achieve economic development?
- Do iwi and hapu values form the basis for formulating and developing principles?
- Do they promote ethical and cultural standards or guidelines?
- Do they encourage and discourage certain behaviours?
- Do they determine a guiding philosophy for conducting business and planning Maori sustainable development?

Examples given at hui/workshops, focus group hui, interviews, and from numerous planning reports and notes, show that Maori values can influence and direct sustainable development. They are also fundamental in providing the vision. If values are used as principles, a statement of intent, or a guiding philosophy they can preside over issues such as: what can or cannot be developed in the tribal rohe; identify taonga; determine the constituency being represented; decide what resources are off limits; who to talk to; acceptable behaviour; standards, protocols; the use and management of natural resources; what can be sustainably used and managed; impacts on significant cultural or heritage sites; how people interact with each other, network, reach consensus; the form, nature, governance of an organisation, its strategic plan; standards and business guidelines, ethics, responsibilities, how does a Maori organisation, business, or service operate, what should its structure be, what should be its governance structure, who does it represent. Most Maori organisations have enormous difficulty balancing traditional values with pressures to follow mainstream economic models, as these mainstream models have a central focus on profit and financial prudence and accountability. Case study examples for a number of iwi and hapu strategic plans are given in *Appendix 1*.

Information Technology for Maori organisations

Many iwi strategic planning documents have indicated a strong desire to establish tribal knowledge or information systems, including archives and databases, as a central repository and resource for iwi, hapu, and whanau. The importance of some kind of information technology (IT) strategy for Maori organisations is further elaborated by the statements below, all from Trust Boards, Runanga, and iwi authorities. The statements have subsequently been organised into three main groups: Information systems and databases; communication strategies and networks; and effective planning and policy. The purpose of any information system is to underpin effective planning and policy and to plan into the future while building on the past. Any IT strategy should be developed within a context of a Maori sustainable development framework (Figure 1). Information systems and knowledge bases will become central to Maori organisations planning sustainable development, and for entering and fully exploiting the world knowledge economy. The statements below, from a review of iwi planning documents, stress the importance of developing Maori information systems to meet the needs of iwi, hapu and whanau.

Information systems and databases:

“establish a systematic and secure tribal archives system within the tribal rohe”;

“develop a taonga database”;

“establish a database of people with cultural knowledge”;

“document and archive historical records”;

- “establish a historical and cultural database”
- “establish and maintain an database for hapu and marae”
- “establish and maintain a database of land trusts”
- “develop resource inventories and statistical information”
- “analyse cultural and social data to identify performance achievement”
- “develop an economic and resource database”.

Communication strategies and networks:

- “develop a communication and coordination strategy between iwi, hapu and whanau”;
- “establish effective networks and relationships with key organisations”;
- “develop an iwi information sharing strategy”;
- “improve communication networks”.

Effective planning and policy:

- “ensure effective management of tribal resources”
- “develop iwi and hapu environmental management plans, te taiao, kaitiakitanga”;
- “ensure the efficient and sustainable use of tribal resources for the benefit of iwi, hapu, and whanau”;
- “establish hapu resource management plans covering human and physical resources”;
- “complete a hapu management plan”;
- “develop iwi and hapu environmental monitoring approaches”;
- “complete a hapu development plan”;
- “develop a strategic plan for each hapu”;
- “develop performance review measures and indicators”.

It will be important to coordinate carefully the future development of information systems so that partnerships and alliances are formed to access required information more effectively, and to avoid costly duplication. Information sharing and improved access to information in public domain information systems, such as central and local government databases, should be encouraged through partnerships or agreements. At the same time, any Maori organisation obviously needs to consider carefully the protocols on the use of its own knowledge and information, or that belonging to its constituents. This will require proper acknowledgement of the source of all information (*Table 2*) and careful consideration of intellectual property rights. This may mean limited or protected access to all confidential or sensitive information (*Figure 3*). The way knowledge and information is derived and used should always be based on consultation with constituents, such as iwi and hapu representatives.

Discussion

The argument over defining sustainable development has generated calls not just for novel approaches to development but also for a fundamental rethinking of western economics (Loomis, 2000). Much can be learnt from approaches being used by indigenous peoples worldwide to achieve sustainable development, which is often driven by fundamental goals and aims for self-determination (Durie, 1998; Potiki, 2000; White, 2000). Durie described Maori self-determination as “practically and intimately bound to the aspirations and hopes within which contemporary Maori live”. He went on to define self-determination as being made of two main parts:

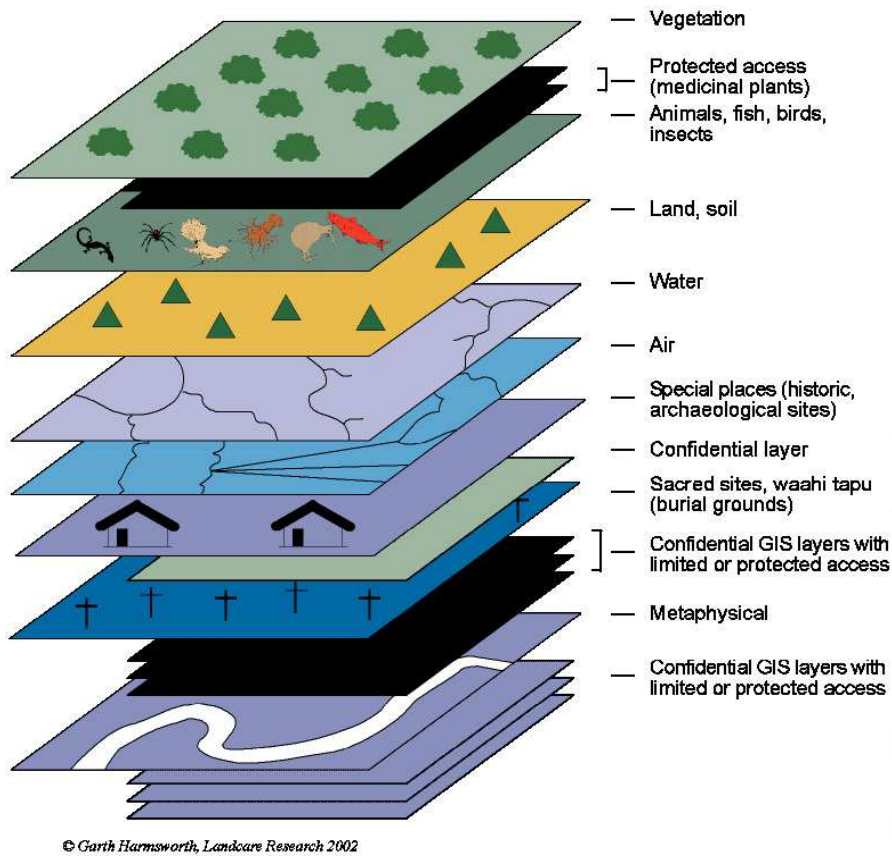
advancement of Maori people as Maori; and the protection of the environment for future generations. Advancement was further qualified as being made up of three dimensions, involving both the individual and the collective:

- a commitment to strengthening economic standing, social well-being, and cultural identity;
- power and control, political representation and active management at all levels, including better self-management of natural resources, greater productivity of Maori land, active promotion of Maori health, sound education, enhanced use of the Maori language, and decision making that reflects Maori realities and aspirations;
- change: cultural fossilisation is not consistent with the spirit of development, even though traditional values and knowledge have important lessons for today.

However, there is an increasing realisation that many traditional values, such as tikanga, tino rangatiratanga, mana motuhake, kaitiakitanga and whakakotahitanga, handed down by tipuna are as relevant today, if not more relevant, as we move into a world of complex challenging issues, where more holistic approaches to finding solutions for intimately linked social, economic, environmental problems are required. In the last 20 years we have increasingly seen a re-alignment between indigenous and western thinking through international forums to tackle these issues. Traditional knowledge forms are increasingly being recognised worldwide as a means to help find solutions for complex problems, to enhance understanding of our environment, to provide a basis for strengthening cultural identity, and to develop economic opportunities.

This paper provides a synopsis of the current state of thinking of many Maori organisations and their constituent representatives, through the 1998 to 2002 FRST-funded MSD research with four participating iwi authorities, supplemented by an analysis of selected strategic plans. Results indicate a consistency in Maori approaches to achieving sustainable development, characterised by a desire to achieve multiple political, cultural, social, environmental and economic goals. The paper also provides a conceptual framework (*Figure 1*) for achieving Maori sustainable development, identifies common iwi and hapu approaches and methods as integral parts of this framework, and articulates a number of key stages required to achieve self-determined holistic development (Loomis, 2000). This represents a huge challenge for Maori organisations in relation to how they should balance economic activity in a way that equitably distributes wealth into these other significant outcome areas. The other major challenge for Maori organisations is how, within the much larger iwi or hapu, to identify their role in terms of achieving what are usually the aspirations of the greater iwi or hapu within and outside the tribal rohe. Maori organisations will have to define their place in the 21st century carefully to achieve multiple outcomes on behalf of their constituents and beneficiaries, most of whom now live outside the tribal geographic area in urban environments. Only when this definition is clearly determined, can they truly advance, capture opportunities for sustainable development, strengthen economic standing and build capacity, and retain a strong cultural identity and sense of purpose.

Figure 3: Maori values as GIS layers in a computer. Confidential or sensitive information can have different degrees of protected access.



Acknowledgements

This research was funded by FRST as part of contract UOWX0005. We wish to thank all those iwi, hapu and whanau who have participated in the Maori Sustainable Research Project 1998–2002, those people who have commented on aspects of the project, and those who have been associated with the project and kindly donated their time and ideas, and allowed the research team to use information from their strategic plans and records from hui and workshops. In particular we would like to thank Tauranga Moana Maori Trust Board, Raukawa Trust Board, Te Runanga o Ngati Porou and Te Arawa Maori Trust Board for their significant contribution to this FRST project. Thanks are given to the iwi researchers who were part of this research and include Rei Kohere (TRONP), Alan Jefferies (RTB), Ngaroma Tahana (TAMTB), and Erica Rolleston (TMMTB). Hone Pene is thanked for his early contribution to the programme in hui and interviews and his significant input into kaupapa Maori research.

Endnotes

1. Both this paper and the preceding one relate to the same research project. Here, the emphasis is on values, aspirations and social, natural and cultural resources. In the preceding paper, the focus was largely on the capacity building aspect of the project and on its overall location historically and politically.

2. In the case of this paper, the list of references includes a number of unpublished works and personal communications. Although such works would normally be referred to in footnotes, they are included here in the list of references because of their particular significance in the case of this research project.

References

- Asher, G. and Naulls, D. (1987). *Maori Land*. Wellington: New Zealand Planning Council.
- Durie, M. (1998). *Te Mana, Te Kawanatanga: The Politics of Maori Self-Determination*. Auckland: Oxford University Press.
- Durie, M. (2000). Maori Development: Reflections and Strategic Directions. *He Pukenga Korero*, 5, 1.
- Elkington, J. (1998). *Cannibals With Forks: The Triple Bottom Line of 21st Century Business*. Gabriola Island, BC: New Society Publishers.
- Emery, D. (2000). Visioning and strategies for Sustainable Development: the programme for a small to medium size runanga, Te Runanga o Raukawa. A paper presented at Toi Te Kupu, Toi Te Mana, Toi Te Whenua Conference on Maori Development in a Global Society held at Putahi-a-Toi, School of Maori Studies, Massey University, Palmerston North 4–6 July 2000.
- Harmsworth G. R.; Barclay-Kerr, K.; Reedy, T. (in prep). *Maori sustainable development toolkit*. Hamilton: School of Maori and Pacific Development, University of Waikato.
- Harmsworth, G.R. (1995). *Maori values for land-use planning: Discussion Document. Manaaki Whenua-Landcare Research unpublished report*.
- Harmsworth, G.R. (1997a). Maori values for land-use planning. *Broadsheet, newsletter of the New Zealand Association of Resource Management* (pp. 37 – 52). February 1997.
- Harmsworth, G.R. (1997b). Maori values and GIS: The New Zealand Experience. *GIS Asia Pacific: The Geographic Technology Publication for the Asia Pacific Region* (pp. 40 – 43). April 1997.
- Harmsworth, G.R. (1998). Indigenous values and GIS: A method and framework. *Indigenous Knowledge and Development Monitor*. Netherlands organisation for international cooperation in higher education (Nuffic), 6, 3. December 1998.
- Iremonger, C. & Scrimgeour, F. (2002). *Strategy directory for Maori Sustainable Development*. Hamilton: University of Waikato.
- Loomis T., Gibson, J., Harmsworth, G. R., Marsh, D., Pene, H., Scrimgeour, F., Barclay-Kerr, K. (2000a). *Maori Sustainable Development in Te Puku o Te Ika. 1998–2000*. Project report for Tauranga Moana Maori Trust Board (TMMTB). FRST contract UOX0005. Hamilton: University of Waikato, School of Maori and Pacific Development.
- Loomis T., Gibson, J., Harmsworth, G. R., Marsh, D., Pene, H., Scrimgeour, F., Barclay-Kerr, K. (2000b). *Maori Sustainable Development in Te Puku o Te Ika. 1998–2000*. Project report for Te Arawa Maori Trust Board (TAMTB). FRST contract UOX0005. Hamilton: University of Waikato, School of Maori and Pacific Development.
- Loomis T., Gibson, J., Harmsworth, G. R., Marsh, D., Scrimgeour, F., Barclay-Kerr, K. (2002a). *Maori Sustainable Development in Te Puku o Te Ika. 1998–2000*. Project report for Raukawa Trust Board (RTB). FRST contract UOX0005. Hamilton: University of Waikato, School of Maori and Pacific Development.
- Loomis T., Gibson, J., Harmsworth, G.R., Marsh, D., Scrimgeour, F., Barclay-Kerr, K. (2002b). *Maori Sustainable Development in Te Puku o Te Ika. 2000–2002*. Project report for Te Runanga o Ngati Porou (TRONP). FRST contract UOX0005. Hamilton: University of Waikato, School of Maori and Pacific Development.
- Loomis, T.M. (2000). Indigenous Populations and Sustainable Development: Building on Indigenous Approaches to Holistic, Self-Determined Development. *World*

- Development* 28, 5.
- Marama Te Ao (*pers. comm.*). Te Runanga O Raukawa Inc. research unit. 2001/2002. Palmerston North.
- Pene, H. (*pers. comm.*). Kaupapa Maori research methods.
- Potiki, T. (2000). A Traditionalist Approach to Iwi Government. *He Pukenga Korero*, 5, 2.
- Raukawa Trust Board (RTB). (1998). *Raukawa Trust Board (RTB) 1998-2000 Strategic Plan*. Tokoroa: Raukawa Trust Board (RTB).
- Raukawa Trust Board (RTB). (2000). *Raukawa Trust Board (RTB) 2000-2005 Draft Strategic Plan*. Tokoroa: Raukawa Trust Board (RTB).
- Te Arawa Economic Summit (1998). Summit and workshop notes: October 6th – 8th 1998. Rotorua.
- Te Runanga O Ngai Tahu (TRONT).(1995-2002). *Te Runanga O Ngai Tahu Annual Reports*.
- Te Runanga O Ngati Porou (TRONP). (1993). *Te Runanga O Ngati Porou, July 1993 Strategic Plan*.
- Te Runanga O Ngati Porou (TRONP). (1998a). *Mana Motuhake Ngati Porou - Future Directions Consultation Document*. Te Runanga O Ngati Porou.
- Te Runanga O Ngati Porou (TRONP). (1998b). *Te Runanga O Ngati Porou, 1998–1999 Draft Strategic Plan*.
- Te Runanga O Ngati Porou (TRONP). (1998c). *Te Runanga O Ngati Porou, 1998–2003 Strategic Plan*.
- Te Runanga O Ngati Porou (TRONP). (2000a). Representation Discussion paper: *Discussion paper on Preferred options for representation on Te Runanga O Ngati Porou*. Te Runanga O Ngati Porou.
- Te Runanga O Ngati Porou (TRONP). (2000b). *Ngati Porou Commercial Fisheries Strategic Plan*. Te Runanga O Ngati Porou 2000.
- Te Runanga O Raukawa Inc. (TROR Inc.). (1990). *Proposal for a programme of Hapu and Iwi Management and Development*. Raukawa Marae, Otaki 22nd May 1990.
- Whakakohuri Whenua. (1999). Te Runanga O Raukawa Inc. *Raukawa planning information and Strategic Development Chart, 1999*. Unpublished proposal report for Maori business start up service. Palmerston North: TROR Inc.
- White, P. (2000): Restoration of the Tribal Collective: Rebuilding Tribal Capacity Alongside Economic Development. *He Pukenga Korero*, 5, 2.
- Winiata, W. (1975). Whakatupuranga Rua Mano (Generation 2000) structural diagrams, notes.
- Winiata W. (1988). *Hapu and iwi resources and their quantification, Volume III, Part two: future directions*. Wellington: Department of Social Welfare, The Royal Commission on Social Policy.
- Winiata W. (2000). *Some thoughts on a Theory of Managing Mana-a-Hapu and Mana-a-Iwi Relationships: The Long Term Survival of the ART Confederation as a Case Study*.

Appendix: Case study examples

The vision, mission and guiding principles

Examples of the *vision statements* of most Maori organisations include reference to Maori values within a tikanga framework. *Vision statements* (usually for a 10–25-year timeframe) from 8 iwi planning documents included statements such as: “restore and develop mana and identity”; “improving the lives of nga uri”; “Mana Atua, Mana Tangata, Mana Whenua”; “key player in the economic, social, and cultural development of the constituency area”; “key Maori organisation in the cultural, social and economic development of the iwi and through a strong economic base will deliver a wide range of educational, social, and health services”; “active role in the unification of the iwi”; “assisting hapu and other Maori organisations within the rohe to achieve their economic development aspirations”; “coordinate amongst hapu environmental management and policy”; “advocate protection of iwi and hapu taonga”; “follow principles based on tikanga”.

Examples from various organisations’ mission statements include:

“Working on behalf of whanau, hapu, and iwi to establish an iwi or hapu identity”; “collate and determine te reo, tikanga, korero o mua, mana wairua and nga taonga tuku iho”; “involve constituents or beneficiaries in iwi affairs; resolve all land, forestry and fisheries claims; unify, coordinate, and sustainably manage the use of iwi resources”; “enter partnerships with central government, local government, the private sector and the wider community based on iwitanga”; “become the funder, purchaser and provider of all services to iwi, hapu and whanau within the tribal rohe”; “the vision will be achieved through cultural, economic, social and political developments that contribute to the prosperity and survival of the iwi, hapu and whanau while actively enhancing tino rangatiratanga or mana motuhake”; “to facilitate the unified development of people within the tribal rohe, and assist iwi, hapu and whanau achieve their aspirations”; “to develop strategies and actions which facilitate the increase and expansion of the tribal economy, by utilising collective tribal resources, by sharing skills and knowledge to improve capacity, by increasing cooperation, efficiencies, and competitiveness to sustain and advance the governance and profitability needed to service the iwi as a whole”.

Guiding principles are typically based on iwi, hapu, and whanau values. Values form the platform for establishing and forming a cultural framework for holistic tribal development and strategic planning. Iwitanga may embrace many of the values important to iwi and hapu and draws on the collective strength of the iwi while celebrating unique hapu and whanau identities. It contributes to the enhancement and strengthening of whanau and hapu links, achieves hapu independence whilst recognising the value of inter-dependence of the iwi as a whole; and also recognises that people are the greatest asset and that there is a need to maximise the transferable knowledge and skills within the iwi and constituency as a whole.

Guiding principles from six iwi planning documents included statements such as:

“Provide every person within the iwi the opportunity to actively participate in the development of his/her own whanau, hapu”; “draw on the collective strength of the iwi to achieve tino rangatiratanga or mana motuhake”; “celebrate the unique identify of the iwi, hapu, or whanau”; “contribute to the enhancement and strengthening of whanau and hapu links”; “achieve hapu independence whilst recognising the value of our inter-dependence as an iwi”; “recognise that people are our greatest asset and we need to maximise the transferable knowledge and skills that we all possess”; “the maintenance and development of iwi tikanga and reo”; “all development will be consistent with iwi or hapu tikanga”; “to provide iwi leadership which empowers nga uri, whanau and hapu”; “recognise iwi and hapu independence and self-reliance”; “recognise the Treaty of Waitangi as the founding constitutional document governing the relationship between the iwi, the Crown, and peoples of Aotearoa”; “the right of the iwi to manage iwi affairs”; “the right of the iwi to fund, purchase and provide all central government, local government and private sector services to its constituency”; “the obligation of the iwi to ensure the total spiritual and physical wellbeing of the other iwi, hapu, whanau living within the iwi tribal rohe”; “the iwi will be successful in both Pakeha and Maori worlds”; “the obligation of the iwi to the maintenance and conservation of te taiao – the natural environment”.

Goals and objectives

Goals and objectives are commonly developed from the vision, the mission and the guiding principles. Examples of goals or priority areas are:

“Work on behalf of the iwi, hapu and whanau”; “establish an iwi or hapu identity”; “preserve and maintain te reo, tikanga, korero o mua, and taonga tuku iho for the iwi and hapu”; “provide services within the iwi rohe”; “resolve all iwi and hapu claims”; “establish partnerships with key agencies”; “ensure the conservation and maintenance of natural resources”; “unify the use of iwi, hapu and whanau resources”; “advocate and facilitate processes to enhance independence for whanau, hapu and iwi”.

Goals are then often subdivided into objectives. These are usually more specific actions, and are measurable. Examples include:

“Communicate and consult with whanau, hapu, and marae”; “consult and communicate with iwi and hapu”; “develop a strategic plan”; “progress the Treaty claim”; “increase the use of te reo by iwi, hapu and whanau”; “establish and maintain high quality education, training, health, social services within the tribal rohe”; “develop an economic development plan”.

Setting a direction for Maori sustainable development

The strategic plan sets both a direction for Maori sustainable development by an iwi, hapu or whanau, and an agenda to achieve a vision, a mission, goals, and objectives. The values and principles discussed earlier guide the development of the strategic plan and the specific goals and actions endorsed (*Figure 1*).

As part of the MSD research, a large number of goals listed in eleven iwi planning documents going back to 1975 were collated and analysed. These indicated that eight main theme areas were regarded as crucial for holistic tribal development. These are shown below with examples of the actual iwi goal statements:

- **Cultural identity, integrity, and growth:**
“Retain, enhance, and practice the ancestral heritage of the iwi, hapu, and whanau”; “preserving and maintaining te reo, tikanga, korero o mua, and taonga tuku iho”; “consolidate and celebrate the unique identity of iwi, hapu, whanau”.
- **Whakakotahitanga, partnerships, and political representation:**
“Advocate and facilitate processes to enhance independence for whanau, hapu and iwi”; “work effectively on behalf of constituents”; “work with nga uri through hapu, marae and taura to achieve the strategic goals”; “achieve more effective iwi and hapu political representation at all levels”; “increase participation and partnerships to achieve more collective decision making both internally and with outside organisations”.
- **Service provision and delivery:**
“Provide a range of social, educational and economic services”; “enhance service delivery within the rohe”.
- **Capacity building:**
“Provide opportunities for the iwi, hapu, and whanau to develop their skills, knowledge and expertise”; “promote and coordinate education and training”; “promote employment within the rohe”.
- **Whaiora, Maori wellbeing:**
“Attain a quality of life that ensures the total wellbeing of people, whanau and hapu”.
- **Kaitiakitanga:**
“To establish a goal to ensure conservation and sustainable management of natural resources”.
- **Treaty recognition and resolution:**
“Resolve all treaty claims”; “ensure the return or retention of tribal resources”.
- **Maori sustainable development and economic growth:**
“Facilitate and coordinate the sustainable development of assets belonging to whanau, hapu and iwi”; “develop the organisation’s economic assets to assist with the development of iwi, hapu and whanau aspirations”; “ensure the development of economic assets in a sustainable way”; “develop a tribal economic base”.

The *goals* for each theme area, shown above, are usually further sub-divided into a large number of *objectives*, *actions* and *performance targets*. *Objectives* and *actions* are usually listed and prioritised, and all objectives can be regarded as progressive steps achieved through a set of measurable actions to

achieve the goal. Examples of *objectives*, and *specific actions* for each of the eight theme areas are given below:

Cultural identity, integrity, and growth:

Objectives included:

“Increase the use of te reo by nga uri”; “incorporate tikanga into all organisation activities”; “develop and implement an oral research programme”; “identify iwi and hapu taonga”; “maintain a recognition of the cultural and spiritual element in the organisation’s operations”; “support for development of marae facilities”; “hold festivals and wananga to celebrate the iwi, hapu, whanau”; “establish a systematic and secure tribal archives system within the tribal rohe”.

Specific actions included:

“Apply for funding for marae”; “establish a wananga”; “develop a taonga database”; “facilitate teaching of te reo and tikanga on all marae and in the workplace”; “research whakapapa and history”; “maintain cultural protocols such as karakia and tikanga in all workplace activities”; “approve a code of conduct”; “establish protocols”; “improve communication of tangi, marae, hui and important events”; “establish a database of people with cultural knowledge”; “document and archive historical records”; “establish a historical and cultural database”; “hold cultural festivals, wananga and hui”.

Whakakotahitanga, partnerships, and political representation:

Objectives included:

“To achieve local, regional, and national representatives mandated by and accountable to the iwi”; “to facilitate the election of mandated political representatives”; “ensure that iwi, hapu and whanau have access to all available iwi information”; “ensure that iwi, hapu and whanau have the opportunity to participate in effective decision making”; “develop a communication and coordination strategy between iwi, hapu and whanau”; “establish the best tribal model for representing nga uri”; “encourage and assist uri, whanau, hapu, and iwi to achieve tino rangatiratanga/self determination”; “advocate and provide leadership over issues that impact on the tino rangatiratanga of uri, whanau, hapu and iwi”; “ensure political representation at the iwi, hapu land whanau level”; “advocate on government and other issues that impact on nga uri”; “establish effective networks and relationships with key organisations”; “coordinate and network with relevant agencies”.

Specific actions included:

“Communicate and consult with whanau, hapu, and marae”; “identify needs of whanau and hapu”; “consult and communicate with nga uri”; “consult and communicate with land trusts”; “ensure accountability to whanau and hapu”; “develop strategies to address needs of whanau and hapu”; “establish and maintain a database for hapu and marae”; “establish and maintain a database of land trusts”; “develop resource inventories and statistical information”; “review the organisational structure of the runanga or the board”; “development of an iwi information sharing strategy”; “production of newsletters, use of radio, complete reports”; “minimum number of hui”; “legal investigations and reporting”; “complete discussion papers”; “facilitate and assist uri, whanau, hapu to develop strategies towards greater self reliance and tino rangatiratanga; “organise and run de-colonisation wananga”; “identify leadership issues”; “organise and run wananga to promote and facilitate a leadership base”; “identify key legislative, policy and service delivery issues that impact on whanau, hapu and iwi”; “develop positions on each key issue and identify priorities for action”; “establish protocols, MOU’s, partnerships with other agencies”.

Service provision and delivery:

Objectives included:

“To establish the runanga/trust board as the purchaser of all central and local government services provided to the iwi within the defined tribal rohe”; “to achieve an integrated approach and accountability of all tribal service providers to iwi, hapu and whanau”; “establish a tribal strategy and purchasing plan for housing, health (including sport and recreation), social services, education, training and employment”; “provide a range of social, educational and economic services”; “maintain high quality services in the areas of education and training, health and social services”; “expand services where necessary”; “to devolve the service arms of the runanga/trust board to nga hapu and ensure accountability to whanau/hapu”; “ensure strict compliance with the requirements of funding agencies”.

Specific actions:

“Deliver services to high standards”; “provide services to nga uri”; “research the needs of nga uri and other recipients of services”; “develop and implement strategies to deal with needs identified”; “develop separate strategic plans for education and training, economic development, health, and social services”; “implement recommendations from strategic plans”; “develop performance review measures and indicators”; “implement standard operating procedures”; “implement quality management systems for services and service delivery”; “carry out research and develop policy”; “analyse cultural and social data to identify performance achievement”; “develop research plans to further identify service needs”; “identify and analyse all services currently provided”; “identify gaps and overlaps of service provision and needs”; “develop and implement new services”.

Capacity building:

Objectives included:

“Promote and coordinate education and training”; “promote employment within the rohe”; “establish hapu management plans covering human resources”; “identify capacity needs of iwi”.

Specific actions included:

“Develop a skills database, of profiles, through survey and hui”; “develop a database of job seekers”; “develop a database for identifying skills”; develop a database for identifying qualifications within iwi, hapu, whanau”; “develop strategic plans for education and training”; “training programmes implemented”; “establish an education unit”; “apply for funding for research projects”.

Whaiora, Maori wellbeing:

Objectives included:

“Promote wellbeing through the delivery of key services”; “deliver health services to nga uri”; ensure whanau, hapu, iwi have access to good health services”; ensure the welfare and wellbeing of our youth is paramount”; “target delivery of health services”; “identify and network with community groups with specific health needs”; “provide primary health care in all areas in our rohe”; “liaise and network with existing health providers”.

Specific actions included:

“Deliver efficient health services to nga uri, iwi, hapu, marae”; “promote health and education programmes”; “establish a Maori health centre”; access funds from funding agencies and arrange contracts”; “establish a database network of essential health providers”; “employ appropriately qualified staff”; “develop separate strategic plans for health”; set up programmes to address mental health”; increase whanau awareness of appropriate health services available to them”; “identify gaps and overlaps of service provision and needs”; “develop and implement new services”.

Kaitiakitanga:

Objectives included:

“That the iwi and hapu are involved in all processes regarding the maintenance of the environment”; “develop iwi and hapu environmental management plans, te taiao and kaitiakitanga”; “ensure the efficient and sustainable use of tribal resources for the benefit of the iwi, hapu and whanau”; “develop iwi and hapu environmental monitoring approaches”; “run environmental education courses, wananga, etc”; “establish effective networks and relationships with key organisations”.

Specific actions:

“Identify ways to coordinate and sustainably manage natural resources”; “encourage the involvement of whanau, hapu and other groups in the conservation and maintenance of natural resources”; “hold environmental wananga and hui”; “develop resource inventories and statistical information”; “establish an environmental research and management unit”; “assist hapu to develop local environmental management plans”; “25% of hapu have resource management plans in place by 2005”; “develop and maintain a GIS”; “establish Maori environmental monitoring approaches”; “establish protocols for regional councils to monitor the environment”; “identify and implement Maori environmental projects”; “complete environmental reports”; “produce an iwi or hapu SOE report”; “establish a formal protocol or memorandum of understanding with appropriate organisations for resource management”.

Treaty recognition and resolution:

Objectives included:

“Progress Treaty claims”; “identify and clarify tribal boundaries”; “full ownership of culturally significant maunga, moana, awa”; “resolution of all Treaty of Waitangi Claims covering claims on land, forestry, and fisheries”; “conduct and complete research”; “apply for funding to progress the claims”; “consolidate all claims”; “negotiate settlement”; “negotiate with other neighbouring iwi and hapu to progress claims”; “negotiate repatriation of key taonga”; “negotiate tribal claim and boundary issues with neighbouring iwi”.

Specific actions:

“Improve communication with all claimants”; “establish lines of communication with neighbouring iwi in order to progress claims”; “negotiate agreements on border differences”; “apply for funding”; “establish research capacity”; “develop a research plan”; “implement and carry out research”; “enter negotiations with the Crown”; “complete covenants for maunga, moana awa, ngahere ownership”; “complete casebook for Treaty Claims”; “negotiate and resolve all treaty claims by 2001”; “establish an appropriate organisational structure to represent constituents for settlement of land and fisheries claims”; “return assets and payment of compensation, resolution of all treaty claims by 2002. Measurable performance targets include...”.

Maori sustainable development and economic growth:

Objectives included:

“Manage the commercial interests of the organisation in an effective manner”; “ensure effective management of tribal resources”; “establish an iwi or hapu economic development strategy”; “develop an economic development plan”; “facilitate and coordinate economic development at the iwi, hapu and whanau level”; “ensure the efficient and sustainable use of tribal resources for the benefit of the iwi, hapu and whanau”; “establish an iwi or hapu tourism strategy”; “develop joint ventures with other groups and organisations”; “identify opportunities for joint ventures with land trusts within the rohe”; “investigate business opportunities”.

Specific actions included:

“Discuss and action a range of economic development initiatives with stakeholders”; “develop a strategic plan for each hapu”; “complete a hapu development plan”; “develop an economic development plan”; “complete a tribal economic development strategic plan”; “develop an economic and resource database”; “complete a tribal tourism plan”; “complete an asset realisation plan”; “complete a commercial fisheries plan”; “manage the fisheries interests to maximise long-term returns”; “determine risks, returns and profits from economic development opportunities”; “implement the economic development plan”; “improve communication networks”; “identify potential joint venture projects”.