



Heritage Activity Management Plan

2015 - 2025

Adopted by Council 19 November 2015

CONTENTS

EXECUTIVE SUMMARY

1. Introduction.....	2
Purpose	2
Plan Structure	2
The Heritage Assets/ Activities	2
Finance.....	3
The Stakeholders	3
The Legislative Context.....	4
The Strategic Context.....	5
2. Levels of Service 2015/2025	8
3. Future Work and Development Projects.....	11
4. Trends Affecting Demand for Heritage Activities.....	12
Demographics	12
National Trends in Attitudes to Heritage.....	13
Changes in Presentation and Marketing Heritage.....	13
Funding for Heritage Activities	14
Closure of Buildings as a Result of EQ Regulations	14
WWI Commemoration	15
5. Heritage Houses.....	16
Description of Activity.....	16
Staff 17	
Isel 18	
Melrose House.....	19
Broadgreen Historic House	20
Financial Performance	24
Issues	26
Future Work.....	29
6. Founders Heritage Park	31
Description of the Activity	31
Staff	32
Relationship with other Council Heritage Assets	32
Strategic Direction	32
Strategic Goals	32
Issues	35
Past Performance.....	35
Future Work.....	37

7. Nelson Provincial Museum Pupuri Taonga o Te Tai Ao	38
Description of the Activity	38
Museum Services	38
Customer Feedback.....	39
Financial Performance	40
Past Performance.....	40
Issues	42
Future Work.....	43
8. Other Heritage Activities.....	43
Historic Memorial Sites	43
Research Resources	44
Walks/ Interpretative Panels	44
Heritage Week.....	45
The PROW Website	45
Heritage Fund.....	45
Funding Strategy	47
Future Work.....	47
Financial Forecast	48
Assumptions and Sensitivity Analysis	48
Funding Strategy	48
Confidence in Financial Forecasts.....	49
Appendix 1: Financials	50

Executive Summary

This Plan covers the activities occurring in and around heritage facilities owned by Council including Heritage Houses, Founders Heritage Park, the Nelson Provincial Museum and historic memorial sites. Heritage activities with community wide impact such as the Heritage Project Fund, Heritage Awards and Heritage Week are also included in this Plan.

Heritage buildings are an important asset for Nelson City. They provide a sense of place for residents and contribute to Nelson's unique identity. They have the potential to add economic value by contributing to Nelson's image, both as a destination and as specific attractions for tourists.¹

Council's three Heritage Houses (Isel, Melrose and Broadgreen) have quite different costs and uses by the public. The changes to Melrose House to make it suitable for a new use have demonstrated the ability of such an approach to significantly improve visitor numbers and the community's level of interaction with a heritage asset. Adaptive reuse of Isel and Broadgreen Historic House could be considered in the future to encourage greater community use. Better linkages between all heritage facilities, and sharing resources more equitably between them, will improve management of Council's contribution in this area.

Earthquake strengthening has been complete on Melrose House which is now rated at 35% NBS, Isel House (excluding the chimneys) was strengthened over 10 years ago but remains below 34% NBS and is considered earthquake prone. Work to produce a design and cost estimate to strengthen the Isel House chimneys is scheduled for 15/16 financial year. Broadgreen House is also rated below 34% NBS but is not rated as earthquake prone.

Founders Heritage Park is performing well at present. Council will continue to encourage revenue from commercial activities to maintain this development.

In 2014 Tasman Bays Heritage Trust commissioned a Strategic Review for the jointly funded Nelson Provincial Museum. This identified that the previous focus of the Trust on redeveloping its storage facilities needed to be re-considered in light of the new strategic direction proposed for the Museum. In the meantime the existing storage facilities can continue to be used. Council will look for new opportunities to work with the museum in light of likely strategic changes.

The major issue facing heritage assets around New Zealand is earthquake prone risks. The Christchurch earthquakes triggered a complete reappraisal, at the national level, of appropriate responses to seismic risk. Existing legislation would have required these issues to be addressed but the timeframes, standards and community expectations have all changed since the Christchurch earthquakes.

Council's Property and Facilities Asset Management Plan (developed in 2014) will tackle the specific earthquake strengthening needs of each of Council's heritage buildings. However this is an issue affecting all heritage buildings in Nelson. The Council needs to balance public safety and the value we place on protecting heritage, and the costs of that protection.

¹ UK research (Heritage Counts 2010) found investment in the historic environment made an economic return on investment in a ratio of 1:1.6 over a ten year period.

1. Introduction

Purpose

- 1.1. The purpose of the plan is to guide Council in the provision of heritage activities in its own heritage assets and in the wider community. It also outlines how to provide these services in the most cost effective manner, now and in the future. The Property and Facilities Asset Management Plan will cover heritage building management, so these issues are not addressed in this plan.
- 1.2. The 2015-25 Heritage Activity Management Plan revises and updates the Heritage Activity Management Plan 2012-2022, and informs Council's Long Term Plan 2015-25.

Plan Structure

- 1.3. The Activity Management Plan aims to address:
- Levels of service and delivery of that service, and how demand for these services will change over the life of this plan
 - The best strategies for improving community use of Council's heritage assets
 - The cost of the service over the long term, and a long-term funding strategy.

The Heritage Assets/ Activities

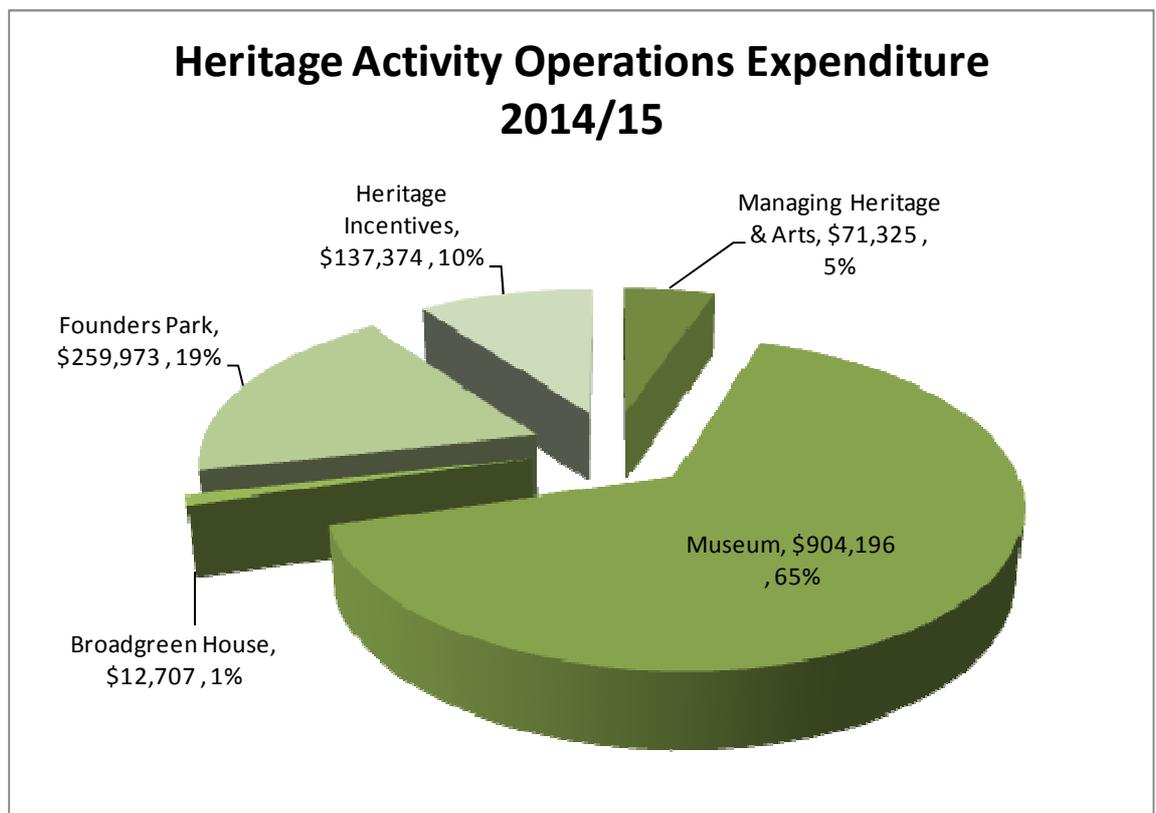
- 1.4. Council's heritage assets are:
- Isel, Broadgreen and Melrose historic houses;
 - Founders Heritage Park;
 - Nelson Provincial Museum (jointly owned by the Nelson and Tasman councils);
 - Historic memorial sites.
- 1.5. Other key heritage activities covered in this plan are:
- Creation of historic trails with linking interpretative panels, and resource materials (such as maps and podcasts)
 - The Heritage Project Fund, heritage properties rates remission scheme and resource consents assistance
 - Heritage Week
 - Heritage Awards
 - The PROW website.
- 1.6. Exclusions from this plan:
- Council owns two heritage listed buildings – Anchor Foundry building on Wakefield Quay and the State Advances building in Trafalgar Street.

They are not included in this plan as their management will be discussed in the Property and Facilities Asset Management Plan.

- The Council gives regular assistance to Fairfield House through the annual plan process. Friends of Old Fairfield manage this heritage building, and it is a well used community facility.

Finance

- 1.7. Operations expenditure on heritage activity makes up 1% of Council's total operating expenditure budget. Capital expenditure and those expenses related to the buildings themselves such as building maintenance and insurance is not included and may be covered in separate AMPs. This chart shows the allocation of operational expenditure.



The Stakeholders

- 1.8. Council does not formally consult on its Activity Management Plans but does consult on heritage activities, depending on the significance and location. The following stakeholders, user groups and area specific user groups may be consulted during the implementation of this Plan.

1.9. Stakeholders identified in this plan are:

- The whole community, including Tangata Whenua – both local Iwi and Matawaka (Māori from the other areas)
- Trusts and other organisations which are involved in managing the heritage assets and activities, including:
- Isel House Charitable Trust
- Melrose Society
- Broadgreen Society
- Nelson Provincial Museum (Tasman Bays Heritage Trust)
- Nelson Heritage Advisory Group
- Nelson Historical Society
- Nelson Branch of New Zealand Genealogical Society
- Heritage New Zealand
- Friends of Old Fairfield
- Other asset and activity users such as local visitors and tourists.

The Legislative Context

1.10. Councils have responsibilities under various pieces of legislation for heritage management and protection, particularly the Local Government Act 2002 (LGA), Resource Management Act 1991, Building Act 2004, and Heritage New Zealand Pouhere Taonga Act 2014.

1.11. The LGA places a legal obligation on Council to manage its assets to a specified standard and in a cost effective manner. Council will do this through its asset and Activity Management Plans, prepared in accordance with the Council's Asset/Activity Management Policy.

1.12. There are provisions in the Nelson Regional Policy Statement 1997 and the Nelson Resource Management Plan, which Council has to follow when considering the use and development of a listed heritage property. The Nelson Regional Policy Statement and the Nelson Resource Management Plan are currently being reviewed and a combined "Whakamahere Whakatu Nelson Plan" being developed.

RPS Policy NA1.3.4: To allow a wide range of potential uses, as an incentive for the retention of historic sites or buildings, providing these uses protect the heritage value of the resource. Council will actively encourage retention, re-use, care of and interpretation of older buildings and their histories on their original sites.

The Strategic Context

Links to Community Outcomes

- 1.13. Heritage activities make a contribution to the Community Outcomes listed in the Nelson Community Plan 2012-22. These outcomes are due to be updated or replaced. When this has been done any new outcomes which are relevant to the heritage activity will be added into this plan.

Relationship to the Nelson Long Term Plan

- 1.14. This Activity Management Plan both shapes, and is shaped by, the Long Term Plan (Council's 10 year plan as required under the LGA). Every three years, the current Activity Management Plans provide the basis for the next Long Term Plan. And the strategic direction set in each Long Term Plan provides the context for each subsequent Activity Management Plan, when it is reviewed.

Links to Council Priorities

- 1.15. Council adopted a number of priorities in Nelson's Long Term Plan 2012-22. Two of these relate to Nelson's identity and heritage and are set out below:
- A leading lifestyle: through providing excellent facilities for, and opportunities to participate in, heritage activities while ensuring a good lifestyle doesn't cost a lot of money.
 - Creative: Nelson has a reputation as an arts and cultural centre, and Council's investment helps to nurture and grow these activities.

Building and Maintaining Strong Relationships With Iwi/Māori

- 1.16. A priority for iwi and Council is to acknowledge the presence of iwi in the rohe (area) and share information about Māori heritage and arts as an integral part of Whakatu/Nelson's identity.
- Ensure that Maori ngā taonga tuku Iho (cultural heritage) is represented as part of Nelson's cultural heritage, while acknowledging that Maori ngā taonga tuku Iho in Te Taihū (Top of the South) does not fit neatly within Council boundaries, by continuing to support initiatives that promote understanding of Maori culture and tikanga.
 - Promote and foster an understanding of Maori culture and heritage by considering opportunities for Maori art and heritage within public spaces and in events and activities.

The Whakatu Nelson Heritage Strategy 2006

- 1.17. This strategy builds on the Community Outcomes and sets the following vision:

We value, protect, and celebrate our distinctive heritage, recognising it contributes to our identity and sense of belonging.

- 1.17.1. The Heritage Strategy also states:

Heritage items are precious and finite resources that impact on our quality of life and add to the appeal of the City as a place of residence, for business location and for visitors, thereby contributing to our ongoing prosperity. Managing our heritage is a fundamental part of the continued sustainable management of Whakatu Nelson's natural, physical and economic resources.

Social Wellbeing Policy 2011

- 1.18. Heritage activities make a contribution to the Cultural Identity objectives and policies in the Social Wellbeing Policy:

To develop a sense of Nelson's distinctive culture by supporting opportunities for Nelson's culture to be expressed....

To tell the local stories, recent and past by providing opportunities for local stories to be heard and understood e.g. through support for interpretative panels, support for the local museum.

Ensure that Māori cultural heritage is represented as part of Nelson's cultural heritage (while acknowledging that Māori cultural heritage in the Top of the South does not fit neatly within Council boundaries)" by continuing to "support initiatives that promote understanding of Māori culture and tikanga.

Promote and foster an understanding of Māori culture and heritage by considering opportunities for Māori art and heritage within public spaces and in events and activities.

Nelson 2060/ Sustainability

- 1.19. The LGA requires councils to pursue a sustainable development approach, taking into account:

- The social, economic, and cultural interests of people and communities
- The need to maintain and enhance the quality of the environment
- The reasonably foreseeable needs of future generations.

- 1.20. Council adopted the Nelson 2060 vision in 2012 and the Nelson 2060 Strategy in 2013. Nelson 2060 envisages a city that has purposefully implemented sustainable development principles and technologies to create a beautiful city and which, amongst other things, recognises, reflects and values our cultural heritage.

- 1.21. The Nelson 2060 Strategy includes a checklist to help determine whether actions and decisions taken by Council move Nelson towards its vision and goals, are in line with Council's four sustainability principles and represent value for money.

- 1.22. The activities described in this Plan contribute to the Nelson 2060 vision for heritage outlined above and to sustainability principle four (we meet human needs fairly and efficiently) by providing activities that recognise and celebrate Nelson's built and cultural heritage. The heritage activity has minimal impact on environmental sustainability (principles one to three).

Nga Taonga Iho Ki Whakatu Management Plan

- 1.23. Iwi management plans are prepared under the Treaty of Waitangi and have status under the Resource Management Act 1991. Nga Taonga Iho ki Whakatu Management Plan was prepared by four of the six tangata whenua iwi of Nelson with the assistance of Council, and is a planning document that Council is required to take into account when preparing or changing the Nelson Regional Policy Statement, the Nelson Resource Management Plan and the Nelson Air Quality Plan. The Nelson Iwi Management Plan documents iwi world views and their aspirations for the management of resources – and it helps Councillors and Council officers to better understand these issues. Integrating the Iwi Management Plan into Nelson City Council's policy framework is part of Council's approach to statutory compliance and to working in partnership with local iwi. Proposed changes to the Resource Management Act and the Treaty of Waitangi Settlement legislation for Te Taihū will mean a review of both statutory requirements and how iwi and councils work together in our rohe (area).
- 1.23.1. Heritage (including cultural and waahi tapu sites and other taonga) is integral to Tangata Whenua cultural identity and to the identity of the wider community of Te Taihū. Council will continue to work with local iwi to implement the vision and objectives of the Whakatu / Nelson Heritage Strategy 2006. It will do this by supporting iwi to protect, promote and celebrate their rich cultural heritage.
- 1.23.2. Tangata whenua cultural heritage sites (which includes archaeological sites) in Council parks and reserves are managed under the Parks and Reserves Activity Management Plan e.g. the Rushpool Argillite mines.
- 1.23.3. All tangata whenua cultural heritage sites are managed under the Nelson Resource Management Plan. The Iwi Inventory Project is likely to lead to some changes to the sites listed within that plan.

2. Levels of Service 2015/2025

2.1. A key objective of this Activity Management Plan is to match the level of service provided by the activity with the expectations of the community. This requires a clear understanding of customers' needs and preferences. The levels of service defined in this section will be used:

- To inform the community of the proposed type and level of service to be offered
- As a focus for the Activity Management Plan strategies developed to deliver the agreed level of service
- As a measure of the effectiveness of this Activity Management Plan
- To identify the costs and benefits of the services offered
- To enable the community to assess the suitability, affordability and equity of the services offered.

	Level of Service	Measures	Targets
Tangata Whenua Heritage	Support local iwi to protect and maintain their cultural heritage.	Level of consultation on policy and planning decisions relating to tangata whenua cultural heritage.	Iwi are consulted on Council policy and planning decisions relating to tangata whenua cultural heritage.
Heritage Houses/Facilities			
Heritage Facilities (Heritage Houses and Founders Heritage Park)	Council manages its resources across the Heritage Houses and Founders Heritage Park in a way that provides value for money to ratepayers.	Changes to Heritage Houses and Founders Heritage Park are investigated, to make them suitable for new uses.	Measures to encourage greater community use of properties are investigated and approved by 2015-16, and work is completed by 2018/19
		Review staffing costs in heritage facilities.	By 2017 the cost to ratepayers per visitor is more equitable across Heritage facilities remain in line with LTP funding
		Review the Council's collection management policies and procedures used within heritage facilities.	Collection policies are reviewed. Revised processes for collection management. Decision on best storage solutions reached.
	Council's heritage facilities provide a range of heritage activities to experience, celebrate and learn about Nelson's history and stories in accessible community spaces.	Number of visitors/users of the facility.	Maintain or increase visitor/user numbers /bookings each year.
Customer awareness of, and willingness to pay for, services provided as measured through a People's Panel survey conducted in the period 2015-2025.		At least 70% of people surveyed are aware of the facilities and are willing to pay for them.	

	Level of Service	Measures	Targets
		Council co-ordinates regular meetings between heritage facilities to ensure co-ordination of heritage events and activities.	Three meetings held per year.
	Council's collection items and displays are used to tell Nelson's heritage stories and attract visitors to the heritage facilities.	Quality of interpretative displays.	Two new or enhanced displays each year at each facility.
Founders Heritage Park (the Park)	Retain and attract tenants who contribute to Founders Heritage Park as an attraction.	Number of tenants who contribute to Founders Heritage Park as an attraction, and are open during public open hours.	80% of ground floor in the Park areas either have heritage displays or are open during the Park's opening hours.
	Activities in Founders Heritage Park contribute to the Park's running costs.	Commercial tenants who support the Park's vision are prioritised. Less security of tenure for community leases than for commercial tenancies.	Appropriate leasable space is let to community tenants on a short term basis. 95% occupancy of available space maintained. Income generated from tenants is not less than \$80,000.
		An additional key attraction is investigated by staff to strengthen the Park's viability.	A proposal about one new key attraction for the Park is presented to Council in 2016/17, for consideration in the 2018/19 Long Term Plan.
		Founders Heritage Park is chosen for an increasing number of events, private functions and conferences.	Continue to attract eight events each year. Increase conference related bookings by one per year. Maintain income from public bookings at 2013/14 levels.
Historic Sites	The community can easily access information about Council-owned historic sites.	Information about historic memorial sites information is publicly accessible on interpretative panels, the PROW or on other created resources.	At least three interpretative panels are created or updated annually. Eight or more stories related to panels are included on the PROW.
Heritage Week	Council provides a range of opportunities for the community to be involved in activities which promote and celebrate heritage in Nelson.	An annual event highlighting Nelson's heritage is run by Council and includes community led events and promotion of public and private heritage sites, organisations and activities.	Two community led events in Heritage Week.

	Level of Service	Measures	Targets
		Use of technology to showcase heritage information.	By 2018 one new or updated method to convey heritage information has been trialled, that can be measured electronically.
WWI Commemoration 2013-2018	Council supports the World War One (WWI) Centenary Commemorations 2013-2018.	Level of support for WWI projects.	One significant WWI commemoration project completed over the period 2015-2018 (\$10,000 spread over five years from the existing heritage activities budget).
Heritage Project Fund	Assist the community to retain, or adapt for better use, heritage items listed in the NRMP.	Uptake of funds by projects meeting the criteria.	The Fund is fully subscribed and funds are used in the way envisaged in the Heritage Strategy 2006.
Heritage rates remission scheme	Provide funding to give rates relief on specified heritage properties in the way envisaged in the Heritage Strategy 2006.	Uptake of funds by properties meeting the criteria.	All funds are used in the way envisaged in the Heritage Strategy 2006.
Nelson Provincial Museum Pupuri Taonga o Te Tai Ao	Celebrate the special nature of the region's history through exhibitions.	Customer satisfaction with exhibitions.	At least 80% of customers are satisfied or very satisfied with the major exhibitions held at the museum.
	Protect and preserve the region's treasures/taonga.	Manage the region's collections according to accepted museum standards.	Meet accepted museum standards and minimise identified risks.
	The museum will be financially responsible, repaying debt as agreed with the two councils and seeking to improve earned revenue.	Results as indicated in Audited Annual Accounts.	The TBHT's balance sheet shows improved equity:debt ratios each year from 2015/16 to 2017/18.

3. Future Work and Development Projects

- 3.1. Summarised below are the identified future work and development needs in order to meet levels of service. High priority tasks will be undertaken by 2016/17 to inform the next review of this Activity Management Plan. Medium priority tasks are signalled for the next three to five years.
- 3.2. Some proposed activities build on work started under the 2012-15 Activity Management Plan, which focused on encouraging joint activities across Heritage Houses.

Activity	Project or Development Need	Responsibility
Heritage Houses	Align lease expiry dates for Heritage Houses, and amend as necessary to enable changes to the buildings for new uses. 2015/2016	Property Officer
	Investigate adaptive reuse of heritage facilities to increase community use of these facilities. 2016/2017	Group Manager Community Services
	Review heritage staff resources with the aim of simplifying the management of the Heritage Houses as a group – giving Council greater influence over levels of service and improving co-ordination and collaboration. 2015/2016	Manager Human Resources and Manager Libraries & Heritage Facilities
	Support the development of a strategic business plan for each house that considers best use of any retained income, individual and combined strengths and develops a combined strategic action plan. 2015/2016/2017	Group Manager Community Services and Manager Libraries & Heritage Facilities
	Continue Heritage Promotion Group and encourage attendance at the Events and Venues Managers Group to support joint marketing. Investigate if scope or membership of the group needs to be extended. 2015/2016/2017	Arts and Heritage Adviser
Heritage Facilities	Investigate adaptive reuse potential of Anchor Shipping & Foundry building and State Advances Building. 2016/2017/2018	
The Nelson Provincial Museum	Review the museum service delivery after the 2014 Strategic review done by TBHT, and how this can best be achieved as a joint project with Tasman District Council.	Policy and Planning

4. Trends Affecting Demand for Heritage Activities

Demographics

- 4.1. In June 2014, Nelson's population was 49,300, this is expected to grow by 3,600 residents over the next ten years to 53,320 in 2025.
- 4.2. The proportion of older adults in Nelson is already higher than the national average and this trend is expected to continue. The proportion of the population aged 65 years and over will increase from 18% in 2015 to 25% in 2025 and is likely to make up more than a third of the population in 2045.
- 4.3. Population growth is expected to slow down over time, based on the assumptions that deaths will increase while births stay constant, and that migration rates also remain constant.
- 4.4. The number of children is expected to decrease after 2018.
- 4.5. The number of households in Nelson is projected to increase by about 1,800 in the ten years between 2015 and 2025, to 22,310 households.
- 4.6. Of the 494,200 New Zealanders over 65 in 2006, nearly half reported having an impairment from a long-term condition or health problem² that resulted in some form of limitation in activity. Older people therefore make up a sizeable part of the 17% of New Zealanders who experience disability and will continue to do so.³
- 4.7. The ageing population is expected to result in a shift in demand towards less vigorous physical leisure opportunities, including passive recreation and leisure activities. Heritage facilities and activities may help to meet this demand as long as they are able to meet customer interests and needs (e.g. are accessible). All of Nelson's Heritage Houses have stairs, which can limit the way guides can work on caring for and creating displays and sharing their knowledge with the public. From a health and safety perspective, volunteers with decreased mobility or hearing need to work in pairs in the Heritage Houses in case of a public or personal emergency.
- 4.8. Our heritage attractions have the potential to provide satisfying opportunities for volunteers. In 2013 New Zealanders had the second highest rate in the world for volunteering their services (World Giving Index). The Dept of Statistics General Social Survey 2012/13 stated that 30.6% of New Zealanders over 15 volunteers in some way. Of these volunteers, 35% were over 65 years, 33.1% were aged 45-64 years and 27.8% were aged 25-44 years.

² Statistic NZ 2006 data, 220,3000 people over 65 years old reported having an impairment

³ NZ Disability Support Network, March 2013. <http://www.insitemagazine.co.nz/issues/march-2013/support-for-an-ageing-population-with-disability/>

National Trends in Attitudes to Heritage

4.9. In 2013, the New Zealand Historic Places Trust repeated their annual survey:

Question	Responses
Interest in seeing NZ's historic places or building protected	53% of respondents were very interested (on a scale of 0-10) compared with 49% the previous year. Of that 53%, 22% gave it 10 out of 10 as a rating.
Has their level of interest changed since the previous year	50% said they had become more interested, compared with 45% the previous year. 54% of those in the 18-44 age group reported becoming more interested. 57% of those on an annual household income of less than \$40k reported becoming more interested.

4.10. When the results were examined in more depth, the following significant differences were found:

- 18% of those in the South Island were 'very interested' in the protection of New Zealand's heritage sites and buildings. This is 11% less than in the upper North Island.
- Those in the older age groups expressed a higher level of interest in the protection of New Zealand's heritage sites than those in the younger age groups (65% of those aged 65+ rated their interest as 8-10 out of 10, compared with 46% of those aged 18-44). Just over half of those in the 18-44 year age group reported having more interest now than they have had in the past (54%).

Changes in Presentation and Marketing Heritage

4.11. Audience development methods used overseas could potentially be of use in the heritage sector. These break down pre-conceived ideas about who enjoys and values heritage activities. A British Museum case study shows how targeted research using the Culture Segments system and using different technologies in presentation and marketing can have impressive results. Creative New Zealand (CNZ) supports the system and encourages its use by arts and cultural organisations in New Zealand. A report prepared by Morris Hargreaves in 2011 for CNZ shows how the system can be adapted for NZ use.⁴

4.12. The Nelson Provincial Museum has already trialled an Augmented Reality programme to present information to young people. Using ipads, the machine "recognises" an object and can bring up related and extended information such as images from the past. Use of smart phone applications and quick response (QR) codes can create easy, low cost links to the PROW website and heritage sites to enhance the experiences of both locals and visitors.

⁴ http://www.creativenz.govt.nz/assets/paperclip/publication_documents/documents/230/original/culture-segments_for-web.pdf?1346811088

Funding for Heritage Activities

- 4.13. Funding sources have changed dramatically in the past five years. Philanthropic funding such as bequests has increased in line with demographics. New Zealanders gave approximately \$2.67 billion to charitable and community causes in 2011, which is twice the amount estimated to have been given in 2006. Approximately 15% of that funding came to Nelson. The top activity to be funded was culture and recreation (31% of the funding). A substantial change in personal giving followed the removal of the tax rebate CAP.⁵
- 4.14. There were three sources of funding from the philanthropic sector in 2011:
- trusts and foundations funded just over one third (36%) of total estimated giving. Statutory trusts provided over two thirds of this funding.
 - personal donations and bequests were the single largest source of philanthropy in 2011, contributing three fifths (58%) of total estimated giving.
 - businesses accounted for just under 6 percent of total estimated giving. (This excludes sponsorship which, if included, would double the contribution.)
- 4.14.2. Although Council cannot usually apply to the philanthropic sector directly, recent fundraising for heritage assets such as the Theatre Royal and the Suter have shown how the community can rally around a cultural and heritage cause, reducing the burden on Council to provide these facilities.
- 4.14.3. Online requests for funds and public media appeals have become more common. Sponsors are looking for opportunities to target customers so it becomes increasingly important for our heritage asset managers to know who their market is. Teaching the community how to better access funds may result in less calls on Council funding.

Closure of Buildings as a Result of EQ Regulations

- 4.15. Council owned buildings will be prioritised for assessments and strengthening as Council sees fit. Potential closures of buildings for varying periods of time may occur. Increased insurance costs and meeting the strengthening regulations may affect Council's ability to sustain levels of service for Founders Heritage Park Isel House and Broadgreen Historic House. Broadgreen Historic House cellar work is completed but no strengthening work has been completed, the house is rated below 34% NBS but is not considered earthquake prone hence a S124 notice has not been issued. Melrose House has had new chimneys installed and is now rated approximately 35% NBS, the section 124 notice has been lifted. Isel House has been earthquake strengthened to 97% NBS, but no strengthening work was completed on the chimneys, as a result Isel House is rated below 34%

⁵ Gnz11 Study Updates BERL Study 2006

NBS and is considered earthquake prone but does not have a critical structural weakness hence can remain open.

- 4.16. Heritage New Zealand encourages changes to historic buildings to enable new uses of them, because buildings that are well used are better maintained and appreciated by the community. Consideration of a wider range of activities than currently occur in our heritage assets could be encouraged through changes in lease arrangements.
- 4.17. Our Heritage Houses all have stairs and no lifts. Visitors can be reluctant to use stairs, and they are a deterrent to the disabled. Consideration of how to best use each level of the houses may result in better usage.

WWI Commemoration

- 4.18. The First World War (1914–1918) was one of the most significant events of the 20th Century. Ten percent of New Zealand’s population of one million served overseas, of which more than 18,000 died and over 40,000 were wounded. Nearly every New Zealand family was affected. The growing attendance at Anzac Day ceremonies in New Zealand and the steady increase in visitors to battlefields in Turkey and Europe, demonstrates a continuing interest in the significance of this period. The New Zealand Government has developed WW100, a programme to mark the First World War centenary from 2014 to 2018.
- 4.19. Local initiatives are being encouraged by the Government and there is already wide interest from community groups who want to be involved. Meetings of these groups were held in 2013 and the Nelson Provincial Museum, assisted by the Nelson Historic Society, is co-ordinating activities with Council support and dedicated funding. ANZAC Day 2015 was a major event at Trafalgar Park with over 5000 attending. The Returned and Services Association are being assisted to develop a memorial located at Marsden Cemetery for likely completion in 2016.
- 4.20. Tasman District Council has indicated that they will support WWI commemorative activities by grants under their community assistance grant scheme as suitable applications are received.
- 4.21. Council is currently committed to assisting Nelson Provincial Museum with \$2,000 annually for five years from the heritage activities programme budget. The museum plans to have the upper gallery devoted to an unfolding panorama from 2014 to 2018, relating to local events as the centenary of these occur. As part of its annual programming, Council’s heritage week will feature an activity that raises awareness of Nelson’s contribution to WWI. This will most likely result in a resource that has lasting benefits for the community eg an interpretive panel, PROW stories.

5. Heritage Houses

Description of Activity

- 5.1. The Isel, Melrose, and Broadgreen houses are owned by Council and came into ownership through purchase or gifting to Council in the 1960s and 1970s. All three buildings are listed on the register of the NZ Historic Places Trust (NZHPT) and in the Nelson Resource Management Plan. All are in their original park settings, which is important to the heritage value of each house. These parks and reserves have heritage ratings and Council has a responsibility for the surrounds to the properties⁶.
- 5.2. All are governed and resourced in some way by both Council and Friends groups. Melrose House and its footprint is leased to a not for profit Friends group that manage the day-to-day operations of the house. Isel House will return to direct Council management from November 2015. Broadgreen Historic House is owned and managed by Nelson City Council but the land on which the Broadgreen Centre is located is leased to the Broadgreen Society.
- 5.3. In addition to varying levels of Council funding, Friends groups use their charitable status to access external funding. This is used to restore, run and open the houses. All have contributed significantly to the conservation and enhancement of the properties.
- 5.4. Without the high levels of volunteer support from the community through these groups, these properties would not be in the condition they are today or be able to be open to the public. Council staff mount exhibitions, and are involved in curation, marketing, promotion and some administration. Succession planning by the Friends groups is needed if these properties are to continue to operate and open to the public.
- 5.5. All the houses are heritage attractions that offer visitors an experience of life in early New Zealand and tell the stories of Nelson. All the Heritage Houses host exhibitions and provide information to visitors using personal guides, written walking guides and pre-recorded messages. They are not museums and are unable to offer full museum services, but they are an attractive complement to the Nelson Provincial Museum's activities.
- 5.6. The opening hour of each house depends on volunteers being available and they vary from house to house. Broadgreen Historic House opens all year, and Isel is closed during winter apart from pre-arranged tours, with no appreciable difference in visitor numbers. Melrose is available year round, and Melrose café works independently, as a sublet part of the house.
- 5.7. Each house's Friends group has gathered collections to display within the houses to create a visitor experience, and has worked on improving the properties' interiors. None have many of their original contents and all use loan items from the public and the Nelson Provincial Museum to varying

⁶ Reserves are managed under the Parks and Reserves Asset and Activity Management Plans

degrees. Melrose Society owns the collection used in the house. Council owns the Broadgreen Historic House collection.

- 5.8. All houses have room for wider community activities to occur. Broadgreen Historic House uses the house as display space and has an adjacent multi-purpose modern building that can be hired called the Broadgreen Centre. Melrose is divided into community spaces that can be hired, a commercial café and a residential flat. Isel has display space, a residential flat, and space under renovation. All are set in magnificent gardens with opportunities to link external use with internal use.
- 5.9. Popular activities are held in gardens adjacent to Heritage Houses such as the Council funded Rose Day, Isel in Bloom and the Teddy Bears Picnic. Such activities raise awareness of the location of Heritage Houses and encourage appreciation for their setting.
- 5.10. Heritage Houses can benefit by running fundraising activities when Council festivals and events occur. All houses are members of the Heritage Promotion Group, along with the Nelson Provincial Museum, Founders Heritage Park, Fairfield House, and Nelson School of Music. The group is administered by the Arts and Heritage Adviser and provides a forum for support and exchange of information.
- 5.11. Each house needs to take bookings if they are to get income from personally guided tours, group tours and hire of usable spaces. This is managed by volunteers at Isel, Broadgreen and Melrose Historic Houses. Options to manage bookings for all houses, using a combined system will be investigated during creation of business plans along with other promotional ideas.
- 5.12. None of the houses has a formal business plan that outlines their value to the ratepayer or to Council.

Staff

- 5.13. Council officer time is unevenly spent across the Heritage Houses which, in part, reflects the varying governance/management models and is partly as a result of Council owning the collection housed at Broadgreen Historic House. To address this situation a redeployment of staff has been implemented to give greater equity of resource across heritage facilities.
- 5.14. Since July 2015 Founders Heritage Park and all Heritage Houses activities are combined under the management of the libraries. Joint marketing, creation of exhibitions and activities, curation, health and safety and development of the special nature of all Heritage Houses will be discussed in business plans for each facility and a combined overarching strategy developed.
- 5.15. This disparity was noted in the previous Heritage Activity Management Plan which recommended spreading the cost and service more equitably across the Heritage Houses and Founders Heritage Park.

- 5.16. The Arts and Heritage Adviser works two days a week on heritage activities including management of the Heritage Promotion Group and delivery of Heritage Week.
- 5.17. Council's asset management for Libraries, Founders Heritage Park, Broadgreen House, Isel and Melrose House is managed through the Community Facilities Asset Management Plan. The Libraries activity management details currently also sit in the Community Facilities Asset Management Plan.

Isel

- 5.18. Isel was built in the late 19th century. The house is set in the 7.16 ha Isel Park, Stoke, which is maintained by Council. The house opened to the public in 2003.
- 5.19. Isel has been earthquake strengthened to 97% of the new Building Standard but this assessment excluded chimneys which have not been strengthened, and these elements put the building below 34% NBS. Scheduling of this work will be decided in the Community Facilities Asset Management Plan.
- 5.20. Up to 30 Oct 2015 Council leases the entire building, which includes a self contained flat over two levels to Isel House Charitable Trust (IHCT) at a Community Lease rate. From November 2015 the IHCT relinquished the lease for the House so the operational management has now returned to Council staff. IHCT has done substantial renovations during its tenancy. The interior work is complete and exterior painting is due to be completed in 2015. Extra funding was allocated in the Long Term Plan for 2015/16 to cover the completion of repointing work by ICHT. A number of valuable Nelson Provincial Museum collection items are on display in the Isel exhibition space.
- 5.21. The building is in good condition. The restoration of the house is to the International Council on Monuments and Sites (ICOMOS) NZ Charter standards. The Trust has commissioned a recent conservation plan which can be used to guide future restoration.
- 5.22. Council funding is for external programmed maintenance. Additional operational funding is now being sought from Council as a result of IHCT relinquishing their lease.
- 5.23. The return of Isel House to Council staff management provides an opportunity to explore options for the future of Isel and how greater synergies can be achieved across Stoke's heritage facilities and the wider heritage sector.

Melrose House

- 5.24. Melrose House and gardens were gifted to Council in 1973. The gardens and house exterior are maintained by the Council. The Colonel Noel Percy Adams Trust (the Melrose Society) formed in 1974 and has worked to preserve and refurbish the house.
- 5.25. The Melrose Society has leased the land and buildings for 10 years, from 12 January 2008 to January 2018, at a rental of \$200 per annum. The permitted use is "community and public purposes including recreational and cultural activities".
- 5.26. The lessee is responsible for keeping and maintaining the interior of the house in good condition, and for monthly owner and building inspections related to the compliance schedule, and has to hold \$2 million of public liability insurance cover. The lessor (Council) is not obliged to insure the building. Any significant maintenance or refurbishment or external work requires the approval of the Operations team.
- 5.27. Council funding is for external programmed maintenance.
- 5.28. A sub lease for the café that opened in 2011 pays rental to the Society. The venture has been very popular and has increased opening hours of the house.
- 5.29. The house has a self-contained flat on the upper floor. This is currently rented by the café manager.
- 5.30. Four rooms are available for hire by the community. The venue is popular for weddings and having the catering facility on site has helped increase use of the asset.
- 5.31. When the house was gifted to Council the contents of the house had been sold, and some fixtures and fittings stripped. The Melrose Society has since worked to restore the building's interior and furnish it attractively, in keeping with the period, using loans and donations. Some items are owned by the Society but they have various loans of large items and have an arrangement with an antique dealer to furnish rooms with saleable items. An inventory of furnishings is held by the Society, and the Society's collection is listed electronically.
- 5.32. Due to the deterioration of paper archives held at Melrose House, these have been accepted for storage by the Nelson Provincial Museum. Some of the records have now been scanned on to digital discs.
- 5.33. Seismic assessment has taken place and work to repair damage to chimneys from earthquakes in 2013 has been completed. Melrose House is now rated as approximately 50% NBS.

Broadgreen Historic House

- 5.34. Broadgreen House was built as a family home in 1855. The Council purchased the property in 1965 and is fully responsible for the state of the building. Council is assisted by the Broadgreen Society, which furnished the house with a loaned and donated collection of items. The Council also owns the on-site collection of 3,000 items, which are mostly costumes and textiles. Storage space for the collection in the Broadgreen Centre and House is limited and at capacity.
- 5.35. Seismic repairs and the filling in of the cellar has been completed but as the chimneys have not been strengthened, the house is rated at less than 34% NBS.
- 5.36. Adjacent to the house is a building known as the Broadgreen Centre, which is wholly owned by the Broadgreen Society and is on Council land. This was built in 2000 by the Broadgreen Society with the assistance of external funds. The Broadgreen Society leases the land on which the Centre is situated. The lease is for a term of 10 years from 1 October 1999, with a right of renewal for a further 10 year term. Rental is a peppercorn. The renewal has been granted and the lease expires on 30 September 2019. There is an agreement between the Society and Council for Council officers to use the office space and facilities at the Centre. Council is responsible for maintaining the exterior of the heritage building, paying the contents insurance for items owned by Council (within both the Centre and House) and utilities such as power, telephone and water. The Society maintains the Centre and the interior of house and cleans the outside walls and gutters.
- 5.37. Clause E in the Background section of this land lease says:
- It is the aspiration of both the Nelson City Council and the Society that in due course, and upon the Society being satisfied its objectives will be faithfully pursued by the Nelson City Council, the Society will surrender the lease herein created and thereby will gift to the City of Nelson the Ancillary Building which is to be known as Broadgreen House Historic Centre.*
- 5.38. A general reading of this would suggest that the Centre would be gifted to Council prior to or at the end of the lease in 2019.
- 5.39. In 2009 the Society made a request for a further renewal beyond 2019 but Council declined this request. Further discussions between Council and the Society will be needed to resolve this issue as there is lack of agreement over the future management of the house and centre.
- 5.40. The Centre functions as the entrance route to the house for the volunteer guides who show visitors around the house, and has office, kitchen and toilet facilities as well as a meeting room which the Society hires out, room for housing the collection in a controlled environment, and work space for volunteers and curatorial staff employed by Council. The Society hires out the meeting room in the centre during daytime hours with two rates, one for not

for profit and one for commercial groups. The room is also used by school and community groups. In 2013, the annual revenue was \$1,744 and is retained by the Society.

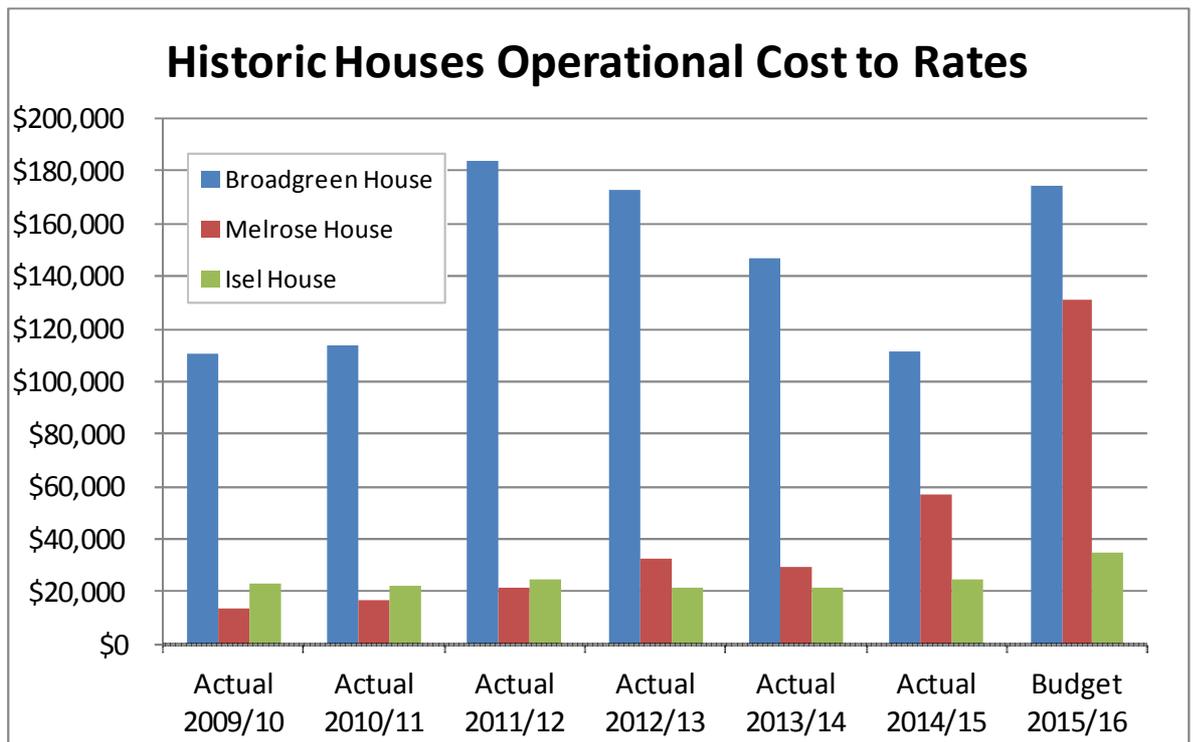
- 5.41. Cost to ratepayers per visitor at June 2015 was significantly higher for Broadgreen than for the other Heritage Houses. The majority of operational costs related to Council staffing, in particular curatorial staff salaries and managerial support from the Manager Libraries & Heritage Facilities. The proposed redeployment of Council staff will see a revised work schedule with Council staff commitment during summer (October-May). Broadgreen Historic House volunteers will continue to open the house, and provide reception services and guides all year with available volunteers working in pairs, for health and safety requirements to be met. Opening hours will reflect volunteer availability and new winter (June-September) hours will be 11am – 3pm
- 5.42. From 1994 all takings at Broadgreen have been credited to the Society. This arrangement was set up when the Society had no external revenue. The Society is now in a good financial position, with around \$50,000 of accumulated funds invested.
- 5.43. In September 2015 Council resolved to change the opening hours of Braodgreen House and to review the financial responsibilities between Council and the Broadgreen Society. That work is being undertaken in November and December 2015.
- 5.44. There is limited storage capacity at Broadgreen House and Centre. The textile collection is continuing to grow so the collection policy needs to be reviewed so that the items do not exceed the storage available. Items that are not of museum standard would be cared for by the Museum and could be used across all heritage facilities for exhibition purposes. As part of a collection review, management of loan items will be considered. A collection review would aim align collection policy for a Heritage House to the existing Founders Heritage Park collection policy, whilst focusing on retention of particular items at each site reflecting the special nature of the heritage attraction.
- 5.45. Summary Comparison of the Three Heritage Houses

	Isel	Melrose	Broadgreen
Council funding from rates	\$25,066 in 2014/15	\$57,347 in 2014/15	\$111,374 in 2014/15
Leases	Lease to Isel House Charitable Trust -including an upstairs flat relinquished Oct 2015. From Nov 2015 Council manages the House directly	Lease to Percy Adams Melrose House Charitable Trust - has an upstairs flat and café area sublet. Lease for renewal January 2018. Sub lease for renewal in January 2014 with final expiry date January 2018.	Council owns Broadgreen House Land under Broadgreen Centre lease for renewal 2019.

	Isel	Melrose	Broadgreen
Visitor numbers	<p>2010/11 2,448 visitors</p> <p>2011/12 2,856 visitors</p> <p>2012/13 2,167 visitors (1,112 local/ 1,055 NZ other or overseas) % of non-local New Zealanders has risen. Spikes in visitor numbers occur around the events in the Park.</p> <p>2013/14 1 Jan - 31 dec 2014: 2345 visitors (1,001 local/ 844 NZ other or overseas/500 not stated but during events)</p>	<p>2010/11 2,208 visitors</p> <p>2011/12 1,465 visitors Visitors from all function bookings. Cafe patrons are excluded from above. These are estimated to be 300 people per week during winter and 550 per week during summer (another 15,000-20,000 visitors).</p> <p>2012/13 – 21,465 visitors for café and house visits. Not keeping records but steady based on café turnover.</p>	<p>2010/11 3,546 house visits 1,415 centre users</p> <p>2011/12 3,117 house visits 1,923 centre users</p> <p>2012/13 2,535 house visits 1,121 centre users (total 3656) Visitors are surveyed and are mainly from New Zealand.</p> <p>2013/14 2103 house visitors Centre users unknown</p> <p>2014/15 3035 house visitors Centre users unknown</p>
Opening hours	Isel part year only (October to end April, and on weekends or by appointment at other times).	Melrose House available for booking all year round Café is open seven days in October – May but closed Monday and Tuesday in May – September.	Broadgreen House can be visited all year although reduced opening hours over winter. Centre can be booked through the Society.
Display items and heritage collections in Heritage Houses	IHCT own collection gifted to Museum, uses loans. No storage problems.	Melrose Society owns collection, uses loans. No storage problems.	Council owned items and loans. Storage for collection at capacity in 2013.
Income streams for Friends groups	Gold Coin Donations from visitors; tours pay \$5 per person, which includes	Café sub-lease; hire of community spaces; during 2012 financial year (Jan -	House entry fee, lease of community space in Broadgreen

	Isel	Melrose	Broadgreen
	refreshment; potential hire of a community space. External fundraising.	December) received grants from CCT (\$25K), Lions Foundation (\$4K) and Pub Charities (\$2K) but nothing since then.	Centre; income mainly from interest on savings. External fundraising.
Improvements and services provided by Friends groups	List of improvements attached to lease completed apart from repointing project. Funding available and scheduled to finish 2016. Between 2002 and 2009 the Trust reports that it has undertaken improvements and restoration work to the value of \$829,000.	Extensive refurbishment of house interior including heating system and installation of commercial kitchen by sub-tenant.	Construction of Broadgreen Centre in 2000, furnishings and fittings for house and centre, paid staff at Christmas period.
Governance structure	Isel House Charitable Trust (IHCT) folded Oct 2015.	Colonel Noel Percy Adams Trust (the Melrose Society).	Broadgreen Society.
Council income from asset	Lease to IHCT \$200 per year (community lease) now stopped House entrance fees to Council	Lease to Colonel Noel Percy Adams Trust currently paying \$200 per annum.	House revenue under review Peppercorn lease for land under Broadgreen Centre.
Marketing	Heritage Promotion Group activities, Facebook page and brochures, Council website, own website, free advertising through Isel in Bloom, Teddy Bears Picnic; Heritage Week programme.	Melrose Society, has developed its own website and brochure, Council website, also via Nelson Venues, Heritage Promotion Group activities, Heritage Week programme.	By Broadgreen Society including AA listing and brochure and Council website, Heritage Promotion Group activities, free advertising through Rose Day, Heritage Week programme. Marketing under review
Membership numbers	Trust has folded. Limited number of volunteers now available	Committee of eight, 180 on database for newsletters and Facebook.	Six life members, nine honorary members, five associate members, 35 volunteer guides and one volunteer assistant.
Activities to attract/retain volunteers	Recent advertisement, Isel in Bloom, social media, website updates. Talks to Probus/community groups has attracted some volunteers.	Recent group responded to an advertisement.	Recent recruitment advertisement.

Financial Performance



This financial performance graph includes asset and activity costs: the balance that needs to come from rates when income used from other sources is used up. Note that this includes property costs. Melrose increases in 2015/16 due to exterior painting. Broadgreen increases in 2015/16 due to painting roof and an increase in staff costs.

- 5.46. Generally, visitor numbers are declining and operational costs are rising, so the cost per visitor is increasing. Council's operational costs are disproportionately high for Broadgreen Historic House due to the cost of Council officer time spent on curation and management.
- 5.47. Council's income from the houses is limited as leases are either peppercorn for land use or they have community lease rates which are minimal. The Societies retain any income derived from visitors or from rental from sub-leases. Broadgreen Society relies on interest from savings as its main source of income.

Performance of Heritage Houses Relative to Operational Costs

- 5.48. Operational costs include Council officer wages, regular maintenance, phone and electricity. It excludes capital expenditure, earthquake assessments and strengthening work.

Facility	Cost to rates 14/15	Visitors 14/15	Subsidy in 14/15
Isel, House only	\$25,065	2,345	\$10.69
Melrose House and internal café	\$57,347	No figures available	
Broadgreen Historic House	\$111,374	3,035	\$36.70
Founders Heritage Park	\$548,203	38,225	\$14.34
Nelson Provincial Museum	\$1,034,480	48,802	\$21.20

External Funding

- 5.49. Government Learning Experiences Outside The Classrooms (LEOTC) funding is difficult to access even for larger organisations such as the Nelson Provincial Museum. The funding is unlikely to increase in the future and educational curricula are constantly changing. However, all the Heritage Houses have schools within walking distance of them and finding ways to forge partnerships with schools would be valuable.
- 5.50. The Societies have successfully accessed external fundraising for interior and exterior work in the past. They have the potential to benefit from bequests, given the demographic of their supporters.

Past Performance

- 5.51. This table shows the past performance of the Heritage Houses relative to existing levels of service.

Level of Service	Measure	Target	Achieved
Council's Heritage Houses provide a range of opportunities to experience, celebrate and learn about Nelson's history and stories.	Number of public exhibitions held at Isel and Broadgreen each year.	Isel and Broadgreen will provide at least two exhibitions and one event relating to Nelson's history each year.	<p>2012/13</p> <p>Isel had one exhibition and two events; Broadgreen Historic House had two exhibitions, six off-site window displays and one event.</p> <p>2013/14 & 2014/15</p> <p>Broadgreen Historic House 2 exhibitions and 2 small displays; Rose Day event; vintage picnic</p> <p>Isel</p> <p>5 events per year [2 are council run per year, 3 are Trust run]</p> <p>One new, and one updated display in 2014/2015</p> <p>One updated display 2013/14</p>

Level of Service	Measure	Target	Achieved
	Number of visitors	Maintain or increase visitor numbers each year.	Visitors to combined house and associated buildings) visitors: IseI increased from 2167 (12/13) to 2345 (13/14) Broadgreen 3656 (12/13) of this 2535 were house visitors; no figures available for centre users in 2013/14 but decrease in house visitors to 2103; house visitors increased in 2014/15 to 3035. Melrose estimated steady at over 21,465 visitors pa based mainly on café turnover
	Customer satisfaction measured through user survey.	At least 75% customer satisfaction.	No result available as resident satisfaction results will not be measured again until 2014/15.

5.52. In the 2012 Residents Survey, 65% of respondents were satisfied or very satisfied with the culture, heritage and arts activity, an increase compared with 61% in 2011 and 49% in 2010. The 2012 Survey also asked respondents which area they would like Council to put more effort into. Although responses varied, culture, heritage and arts ranked second-highest, being mentioned by 8% of respondents.

5.52.1. Proposed levels of service for the future are noted in section 2 of this plan.

Issues

Governance and Management Practices

5.53. Council is reliant on the various Friends groups to keep each heritage house open. The groups presently determine what hours each house opens and what activities are available within each house. They keep the revenue raised from visitors, and can choose to finance internal improvements and house activities. Operational costs for Heritage Houses are met from rates and none of the houses is in a position to be self-sufficient. Changes to the buildings to enable new uses of them or sub-letting may provide some extra revenue to help pay for keeping the buildings in working order and able to be used by the public.

5.53.1. From 1 July 2015 all Heritage Houses and Founders Heritage Park will be managed through the Libraries & Heritage Facilities business unit. This will improve potential for co-operation, and management and cost efficiencies by working collectively.

5.53.2. Closer alignment of the governance or management models could be of benefit and will be considered when Strategic business plans are done.

Staffing

- 5.54. From 1 July 2015 Council curatorial staff will be based at Broadgreen House and Founders Heritage Park and their curatorial and exhibition work will be focused on all Heritage Houses and Founders Heritage Park.
- 5.55. Under the past model Broadgreen House had a disproportionately high cost to ratepayers compared to Isel or Melrose House. Given a new model the implications of staffing changes is yet to be fully determined although costs will even out across facilities with redeployed staff.
- 5.56. Reallocating available officer time to create regular exhibitions across all three Heritage Houses, combining marketing efforts, and taking advantage of new technology may improve visitor numbers. By removing the onus on the Friends groups to create exhibitions, they would be free to focus on the day to day staffing of the houses and hosting visitors.

Lease Conditions

- 5.57. Currently the lease conditions across the Heritage Houses are not the same, particularly the expiry dates.
- 5.58. Isel House Charitable Trust has elected to relinquish its lease of Isel House from November 2015.

Future Business Planning

- 5.59. Forward business planning would ensure not only a clear vision and plan is in place but could reduce the risk of Friends groups being unable to continue in their work at the level required for community use and enjoyment of the house.
 - 5.59.1. Continuing to raise the profile of Heritage Houses is an important component in ensuring the viability of these assets and should form part of any forward planning. Any future marketing could be undertaken across the heritage assets or combined as part of a wider group of heritage and Council assets to achieve maximum exposure.
 - 5.59.2. Business Plans for each house and a combined strategy will be commenced 2015/16. These will be prepared in collaboration between each Friends group and Council, with the assistance of facilitator and with input of external expertise around tourism/funding/ combined strategic focus.

Visitor Numbers

- 5.60. Visitor numbers have been decreasing at Isel and at Broadgreen Historic House. In the past, visitor numbers spike upwards when events or new exhibitions are held. Melrose attracts larger numbers to use their facility because of the changes to the building which has allowed the café to be viable.
- 5.61. Currently customer surveys are mainly focused on understanding where visitors come from. A broader approach to surveying customers, both by the Friends groups and by Council, would build a better understanding of visitor statistics, engagement and satisfaction levels.

- 5.62. In Council's annual residents' survey, a general question is asked about satisfaction with Council's performance across culture, heritage, and the arts. The question was asked in 2014 and every three years after that. In 2014, 72 percent were satisfied or very satisfied with Council's performance in this area, a significant increase compared with 65 percent in 2012 and 61 percent in 2011.

Collections

- 5.63. Council owns the Broadgreen Historic House collection, and there is no storage space left for any additions to this collection. A review of collection management policies will be needed to manage requirements for this collection.
- 5.64. Collections at Isel and Melrose are owned by the respective Friends groups.
- 5.65. Any review of collection management should be carried out in consultation with Founders Heritage Park and should also give consideration to future storage solutions. It may be better for items of regional significance, such as rare textiles, to be cared for by the Nelson Provincial Museum and centralised. This could be considered when the Museum storage issues are resolved.
- 5.66. Collection and exhibition items at each of the houses are recorded, electronically. Fittings and fixtures such as those replaced at Melrose become Council property in the event that houses are returned to full Council management.

Changes to the Houses

- 5.67. Keeping and reusing historic buildings has long term benefits for the communities that value them. When done well, changes to the buildings can restore and maintain the heritage significance of a building and help to ensure its survival. The practice can also benefit the environment by conserving natural resources and minimising the need for new materials. The addition of a café at Melrose is an example of successful changes to the building, which is reflected in growing numbers using it. This could be considered at both Isel and Broadgreen Historic House when their leases come up for review, to appeal to a wider section of the community e.g. for community events and meetings.
- 5.68. There is scope at Isel to alter the lower floor, or use existing rooms differently and create and define three areas – exhibition, caretaker flat and community room/food outlet.
- 5.69. Broadgreen Historic House would be costly to alter although the Centre could be, depending on future ownership.
- 5.70. Any alterations to buildings can be costly and all would need special consents. Earthquake strengthening work would need to precede any decision to alter buildings. Some costs of adaptive reuse could be mitigated through lease agreements. More research and consultation on options is required to find the best solutions.

Future Work

- 5.71. Investigate the options for changes to the houses to enable them to become more self-sufficient, opening up wider uses and working as a part of the parks they reside in. Any proposed changes will be included in future lease arrangements.
- 5.72. Explore the alignment of governance and management practices across heritage assets to make better use of Council resources and money, and to achieve better community outcomes for the houses.
- 5.73. Continue work identified in the previous Heritage Activity Management Plan to reallocate Council officer time across heritage assets to maximise expertise and knowledge.
- 5.74. Continue work on aligning lease periods and, where possible, make other lease conditions the same.
- 5.75. Continue the work of the Heritage Promotion Group to promote these heritage assets and take a collaborative approach to marketing and promotion where possible.
- 5.76. Develop business plans collaboratively between the relevant Friends groups and Council to ensure clear forward planning is in place. A suitable independent facilitator should be engaged to assist in the development of these plans, to achieve consistency in both approach and content.
- 5.77. The business plans should include:
- A vision for the future of the house as a heritage asset and community facility.
 - Expectations around governance and management roles, and responsibilities for each house
 - Review of opening hours across heritage assets
 - Marketing and promotion
 - Ongoing funding arrangements
 - Succession planning for friends groups.
- 5.78. As part of the business plan process, identify strategies to increase visitors to heritage assets.
- 5.79. At least once within the period 2015-2018, survey the general public about awareness of and willingness to pay for Heritage Houses and activities.
- 5.80. Under the umbrella of the Heritage Promotion Group, hold regular meetings between heritage facilities to ensure co-ordination of heritage events and activities, and support members to participate in promotional projects annually.
- 5.81. Review collection management policies and practices to address the focus of future collections, use in displays, and storage issues.

- 5.82. Explore how Council heritage facilities fit into the context of the wider museum and heritage sector, and evolving Nelson's heritage offering

6. Founders Heritage Park

Description of the Activity

- 6.1. Founders Heritage Park (the Park) is a "Heritage Village" comprising 32 wooden buildings on about five hectares of landscaped reserve on Atawhai Drive, close to Nelson's Central Business District.
- 6.2. The purpose of the Park is to tell Nelson stories from early settlement to the 1950s, through permanent displays inside relocated and replica historic buildings and in five open grassed spaces. The Park has a functioning Heritage Railway, a Bristol Freighter aircraft, a lake and a children's playground. The most significant attraction inside the Park is Founders Brewery and Café.
- 6.3. Locals have free entry into this facility. The Park has three main sources of income: admission charges, venue hire and tenancies. During the 2014/15 year 38,225 visitors were recorded during the Park's usual opening hours with 75% Nelson/Tasman local visitors, 14% domestic visitors (from New Zealand – but not Nelson), 11% international visitors. This equates to 12,177 paying visitors generating over \$50,800 in admission fees. Of the 26,000 local non-paying visitors 91% were from Nelson and 9% from Tasman. When event attendees are added, total visitors for the year were 108,000.
- 6.4. The private investment by the tenant into Founders Brewery has greatly improved this facility at no cost to Council. This tenant now assists with attracting visitors to the Park.
- 6.5. The Park has an important role as an events venue and function facility and has both internal and external spaces suitable for a wide range of activities from festivals, weddings and conferences to small scale meetings. The Park can be hired in its entirety for major festivals or by the room. This activity generated \$58,700 in 2014/15.
- 6.6. There are 28 separately tenanted buildings/rooms which are leased out to various small businesses and community organisations in 2014/15. They contribute to the Park's vitality and income. and generated income of \$98,400 (11 months). These leases are mostly generic agreements offering two, five year rights of renewal, expiring in 2026. A drop in income from leases from \$116,313 in 2012/13 to \$109,000 in 2013/14 to \$98,400* (*11 months) in 2014/15 has occurred. Part of this is the result of the introduction of community lease rates, and partly from requirement about a caretakers lease.
- 6.7. Significant fundraising for development projects in the Park is made possible by the efforts of the Friends of Founders Heritage Park and their annual Book Fair, which is well supported by the community. Sorting and storage space has been allocated for this fair.
- 6.8. The Park has a large collection of donated items which are managed within the Founders Heritage Park Collection Policy. Items have been rationalised according to the Park's ability to display, store and care for them adequately

on site. There is still much work to be done to update the displays, make the storage space safe and clean, and record items onto a database.

- 6.9. Whakatū Marae shares a boundary with the Park and a strong relationship exists between management of both. Plans to develop a joint cultural space linking the Park with the Marae have been created and Council has funded two pou whenua which mark the boundary where the project may eventually develop over both sites.

Staff

- 6.10. Council employs 3.6 full time equivalent officers at this seven days a week attraction, made up of a full time manager, a full time bookings officer, a curator for two days a week (who also works 12 hours per week at Broadgreen), a full time maintenance person and a weekend customer service officer. The front of house is staffed by 10 core volunteers during the week days, and shifts are made up of two four hour shifts per day.

Relationship with other Council Heritage Assets

- 6.11. In common with the Heritage Houses, Founders Heritage Park has a working relationship with the Nelson Provincial Museum and The Suter, which provide access to research materials and advice on collection management. All members have access to the outreach programme and museum support offered by Te Paerangi National Services. Some volunteers work at both the Park and the Heritage Houses. These heritage assets rely heavily on volunteers to meet their levels of service.
- 6.12. The Park is a member of the Heritage Promotion Group and participated in cluster advertising and promotion of heritage activities throughout 2012/13 and 2013/14.

Strategic Direction

Strategic Vision

- 6.13. The Heritage Activity Management Plan adopted in 2012 replaced the Park's Strategic Plan and sets priorities for the management of Founders Heritage Park. This is supported by annual operational plans.
- 6.14. The 2015-18 vision for Founders Heritage Park is:

Founders Heritage Park aims to be the region's premier family focused heritage attraction and a versatile events venue.

Strategic Goals

- 6.15. Seven groups of goals support the vision. Two particular priorities for 2015-2018 are:
- Maintain the number and range of events at Founders Heritage Park, increasing use of the Park as a conference venue and tourist attraction.
 - Maintain a balance between commercial and community tenancies occupying available space.

Events Goals

Establish Founders Heritage Park as the first-choice regional location for an increasing number and range of events.

- Increase the use of the Park as a conference venue and tourist attraction.

Development Goals

6.15.2. The Book Fair is a key element of the development of Founders Heritage Park as the funds volunteers raise and gift to Council is ringfenced to support all development work at the Park. Annual objectives for the Development Fund spending are agreed on by the Friends of Founders Trust, Book Fair crew and Council based on these goals:

- Provide a family focused heritage attraction that engages a diverse local audience and attracts families visiting the region.
- Maintain and add to Founders Heritage Park's buildings and gardens to improve facilities for visitors and users, making best use of space in the Park.
- Provide a versatile events venue.
- Provide a safe, physically accessible environment for staff, volunteers and visitors.
- Create a Site Development Plan by 2015 to guide future physical development at the Park for roading, trees and buildings, and potential sites where new developments are possible.
- Work in partnership with Whakatu Marae on the development of a shared cultural park and give local iwi an opportunity to share their heritage as part of the Founders Heritage Park visitor experience.

Tenancy Goal

6.15.3. The number of spaces available for rent has increased by changing buildings to be suitable for new uses. The increased number of available spaces are currently rented out at around a 95% occupancy rate.

- Retain and attract tenants to Founders Heritage Park who contribute to the life of the Park.
- Maintain total occupancy close to 95% of available spaces.
- Maintain commercial leases at 90% of available spaces for rent at the Park in 2015-18. Maintain a balance between space provided for commercial and community tenants and protect the revenue stream through tenure length.
- Investigate possibilities to create more tenancy spaces at Founders Heritage Park as part of the Site Development Plan.

Collections Goals

- Ensure that storage space for the collection remains sufficient and only objects of value to the Park are retained.
- Manage collection items in line with the Founders Heritage Park Collection Policy and use them to create high quality displays that tell the story of Nelson's heritage in an accessible way, to enhance the visitor experience.
- Use suitable collection items to provide child-focused activities to attract families.

Marketing Goals

6.15.4. These goals form the basis of an operational marketing plan that aims to attract an increasing number of visitors to the Park.

- Promote a family-focused heritage attraction that engages a diverse local audience and attracts families visiting the region.
- Keep a focus on local and domestic visitors through marketing activity.
- Promote a versatile events venue attracting a range of community events, that provides accessible low cost entertainment for families and the wider community.
- Promote a versatile events venue attracting a range of commercial activities such as conferences, private events such as weddings, and special interest public events.
- Work in partnership with other heritage assets to provide an extension of the Founders Heritage Park visitor experience.

Financial Goal

- Redirect any increase in revenue raised from tenancies, venue hires, commercial activity or entry fees into developments at the Park – reducing costs to the ratepayers and increasing development and reinvestment opportunities.

Support Goals

6.15.5. This goal has been added in recognition of the community support for the Park, without which it could not operate.

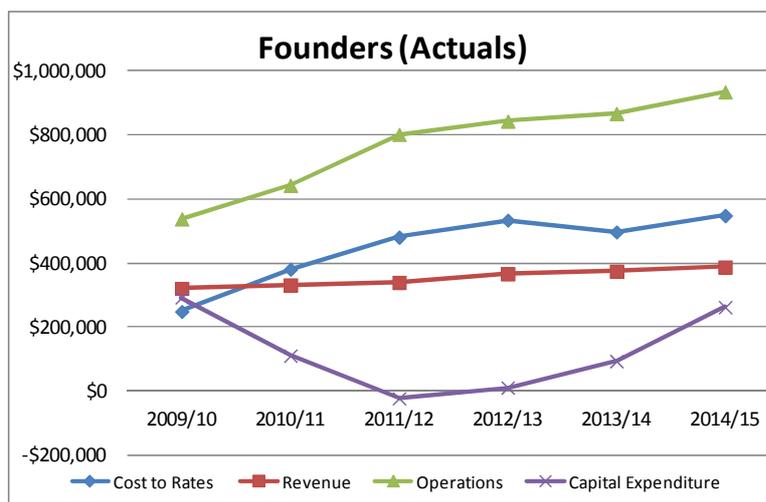
- Value the community and volunteers who support Founders Heritage Park.
- Respect and reward volunteers by giving them meaningful ways to contribute to the Park's activities.
- Support the volunteers and organisers of the Founders Heritage Park Book Fair.

Issues

- 6.16. There is a need to maximise the time of Council officers. This could be done by working more closely and collaboratively over all of the Heritage Houses and the Park. Annual work programmes developed over all four facilities will offer greater value for money spent.
- 6.17. To help the Park become less reliant on rates income in the future, commercial tenancies need to have preference over community tenancies. The Community Assistance Policy 2013 sets out the criteria for community leases. This Policy sets community lease rental at 10% of the market rent for a comparable building. Applications for community leases must receive the approval of the Community Services Committee. Of the total leases available at Founders Heritage Park, management aims to permit only 10% of tenants to have a community lease at any one time. Commercial tenants who wish to build a new attraction within the Park will be encouraged.
- 6.18. In addition, a pricing review for venue hires needs to be completed and implemented. Venue hire charges for commercial activities are likely to increase.
- 6.19. Initial earthquake assessments have been done and any remedial work required to reduce earthquake risk will be determined and prioritised by Council. This may affect the ability of some existing venues to be used and capital expenditure may be required to upgrade these spaces or provide new spaces to meet levels of service.

Past Performance

Financial Performance



- 6.20. Capital increased in 2014/15 \$178k earthquake prone buildings remediation of Founders Bakey and Energy Centre. Also \$64k Duncan House remediation.

- 6.21. Operational costs are covered by a combination of Council rates and revenue generated from the Park.
- 6.22. Revenue generated from the Park activities is stable. In 2014/15, revenue sources other than rates used for operational costs included:
- All rent income (tenancies) – \$98,400 (11 months)
 - All venue hire (including weddings, meetings, conferences and event venue hire) – \$58,700
 - Admissions (paying tourists, as locals have free admission) – \$50,800
 - Recoveries (electricity, phone, water) – \$45,000
 - Book Fair proceeds – in 2014/15 the Book Fair raised \$135,000, which was gifted to Council and ring fenced to improve the Park. A portion of these funds is used to pay off a capital expenditure loan. The loan balance is scheduled to be repaid by 2018.

Improved Accessibility of the Facilities

- 6.23. In response to an accessibility audit, work was carried out in 2012/13 to improve accessibility and this will continue.

Founders Heritage Park Collection Management

- 6.24. In 2012/13 a big reduction of the collection resulted in improved storage and organisation of the collection area. The project raised \$3,000 which was reinvested into improved storage for collection objects and developing displays.
- 6.25. Over the last three years, improvements include a new Engine House, Glass House, Forestry Display, and Railway Cottage displays. Major improvements were made to the Agricultural section, Hospital and Fire Station displays. Shelter, paving and displays were created or improved at Mechanics Lane. Displays relating to two pouwhenua and to local iwi have been installed.

Attracted and Grew New Audiences/ Users

- 6.26. Festivals that are celebrated in the Park attract a range of different audiences who may not have otherwise visited the Park. The Nelson Arts Festival, Marchfest, Spring Fling, Evolve, Nelson Growables and International Kai Festival (in partnership with Whakatu Marae) all target very different audiences and are well attended.

Tenancies in the Park

- 6.27. In 2012/13 the Park had an occupancy rate of 95% of available space. Of the current 28 tenantable spaces, two historic tenants are on community leases/ agreements, with the possibility of four other tenants applying for a community lease.
- 6.28. Tenants who support the aims of the Park are of immense benefit to its success. In 2013 Founders Brewery made a large investment in their premises and the resulting café and open views of a working brewery appears to be increasing the number of regular visitors to the Park.

- 6.28.1. Council can encourage tenants who wish to build new premises or upgrade their existing premises as a way of further developing the Park.

Future Work

- 6.29. An accessibility audit (document A1133058) was commissioned in 2012 and has identified priorities for the next two to four years. Work will continue to improve the accessibility of the facilities including, but not limited to, accessible car parking at either the car park or main entrance. This development area is particularly important given the ageing population, a significant number of whom have disabilities. This will be addressed in the Property and Facilities Asset Management Plan.
- 6.30. Earthquake assessments may affect the ability of some existing venues to be used and capital expenditure may be required to upgrade these spaces or provide new spaces to meet levels of service.
- 6.31. Cultural partnerships – continue to work with Whakatu Marae to develop a shared cultural park.
- 6.32. Future growth – encourage established and new tenants to invest in the facility.
- 6.33. Lease management – investigate methods of lease management to maintain or improve revenue for the Park. These include maintaining a maximum number of tenants, with highest security of tenure given to commercial tenants, and encouraging new visitor attractions to be based at the Park.
- 6.34. Continue to change buildings where required to ensure a versatile events/conference venue is provided.
- 6.35. Explore and implement opportunities for a more co-ordinated approach to Council's heritage assets.
- 6.36. Create a site development plan by 2015 to guide future physical development of the Park for roading, trees and buildings, and identify sites where new developments are possible.
- 6.37. Review venue pricing and bring it in line with other similar commercial facilities in the region, while also allowing community events to be hosted in the park.
- 6.38. Improve one major display per year, including but not limited to: Hops display, Nelson Mail building, Livery Stables, Cultural Park and Mechanical/ Agricultural area.

7. Nelson Provincial Museum Pupuri Taonga o Te Tai Ao

Description of the Activity

- 7.1. In October 2005, the Museum opened on the corner of Trafalgar and Hardy Street on what was part of the original Town Acre site, which was once home to New Zealand's first museum – The Literary and Scientific Institute of Nelson (1842). Both the land and building at this site are owned by the Tasman Bays Heritage Trust (TBHT), which is a charitable trust. The Trust was established in 2000 to administer the Nelson Provincial Museum Pupuri Taonga o Te Tai Ao as a regional heritage facility, on behalf of both Tasman District Council and Nelson City Council.
- 7.2. The Museum houses two main gallery spaces featuring permanent and temporary exhibitions, a classroom, museum shop and roof top garden. A sub lease to a café brings in income to help with operational costs.
- 7.3. TBHT also owns a building that it uses for storage and research at Isel Park, and leases the land that the building occupies from Nelson City Council. This facility is where staff develop exhibitions and care for Nelson's regional treasures (taonga), including one of New Zealand's most significant photographic collections. Extensive historical archives and library resources are also stored here. A workshop and storage area is leased at Elm Street.
- 7.4. The aim of the museum is:

"...to inspire tomorrow through the treasures and tales of yesterday and today. In Nelson we have one museum and two distinct venues where people can share our history."

Museum Services

- 7.5. The Nelson Provincial Museum provides a diverse range of public services:
- Access to heritage objects and materials considered to be of local, regional or national significance.
 - Long-term storage, care and preservation of these objects and materials in a controlled environment.
 - Interpretation and public presentation of our bicultural regional heritage in the permanent exhibition.
 - Archive and research library of manuscripts, books, maps, documents and records with public access. The Museum collection is a basis for research by institutions, academics and the general public.
 - Photographic collection available for research and reproduction, with public access to a website presentation of the Museum. This access to the online collection and exhibitions provides public access to a wider audience.
 - Educational services (Learning Experiences Outside the Classrooms programme) for our regional schools.

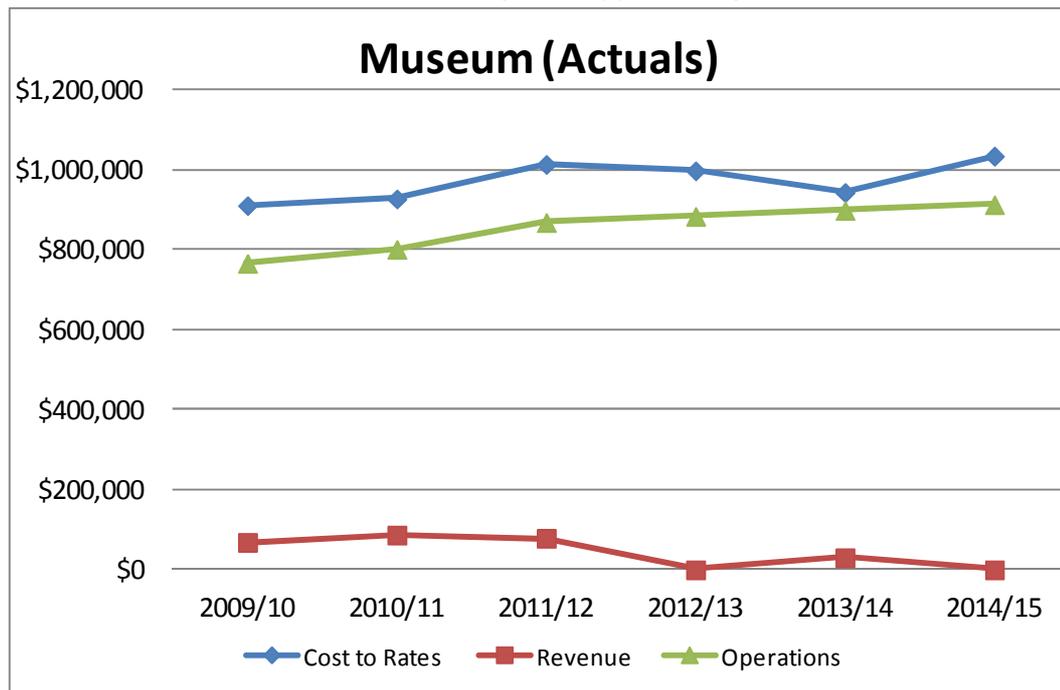
- Hosting of special travelling exhibitions with heritage or science themes, to interest the public.
- Network Support – Museum staff offer professional assistance and advice to other heritage institutions across the region.

Customer Feedback

- 7.6. The Versus 2014 residents survey completed in 2014 included usage and satisfaction of arts and cultural facilities. Sixty per cent of Nelson residents had visited the provincial museum in the last two years.
- 7.7. Residents more likely to use the provincial museum included those residing in Nelson Central (67% cf. total, 60%), aged 65 and over (75% cf. total, 60%) and female.
- 7.8. The Museum staff also surveyed one in every 20 adults who came through the front doors for the past three years. The results of audited data (for the year ended June 2013) are:
- The Museum was the most visited arts and heritage facility in Nelson (55% overall; 59% Nelson and 47% Tasman residents).
 - 72% said they had visited the museum only “once or twice” in the past two years; 20% had visited three to five times; and 7% had visited more than five times. Of the Nelson residents, 31% of them had visited the Museum more than twice in the last two years, and about half of those local residents said they were repeat visitors. The 2011 survey indicated 14% of these were Tasman residents, but the Museum’s own survey suggests of ‘local’ residents, the ratio is roughly 2/3 Nelson residents to 1/3 Tasman residents.
 - Of those who said they had not visited the Museum in the past two years, the two primary reasons were ‘not interested in history/art (44%); and ‘too busy/lack of time’ (27%).
 - Museum visitors are more likely to be:
 - Females (60% compared with being 55% of the general population; Higher income earners, i.e. \$ 50,000 p.a. or more (63% compared with 55% of the general population) and families with school age children (68% compared with 55% of the general population). About half those surveyed are in the under 50 age group – the family demographic.
- 7.9. In 2014/15, 48802 visitors were recorded as visiting the Museum, which is an 18.8% increase on the previous year. (50,000 in 2010;42500 in 2013) This includes 6800 school students but does not include visitors to the Nelson Provincial Museum travelling regional exhibitions at Motueka, Collingwood and Takaka and at the local and regional libraries which have been estimated at 10,000- 15,000. Methodology to record these visitors has yet to be developed.

Financial Performance

- 7.10. The Museum currently receives an annual Consumer Price Index increase.
- 7.11. Since opening at the new site in 2005, Nelson City Council and Tasman District Council have each provided the TBHT with a 5-year loan to the value of \$1.2 million. The loan was due to be paid back by June 2012 and new arrangements have been put in place. Various loans are held against this property by Westpac Bank and in the form of interest free loans being repaid by the Trust to both Nelson City Council and Tasman District Council.
- 7.12. A review of financial performance should recognise the cost to Council of the interest on funds loaned to TBHT (refer Appendix 1).



Past Performance

Exhibitions

- 7.13. The Museum held seven exhibitions in 2012/13, 2014/15 and 2014/15. All were a mix of travelling and self mounted exhibitions. In line with other museums a satisfaction survey is done where one in 20 adult visitors are surveyed. Rates have been maintained at 4-5 on a five point scale giving a satisfaction rating of 85% plus.

Access to Collections

- 7.14. The storage of the collection remains an unresolved issue that impacts on the Museum's ability to protect and preserve the region's treasures/ taonga. The Museum provides research services at the Isel Park facility, which was closed temporarily in January 2013 for earthquake strengthening. Floods in April 2013 affected other storage space provided by Tasman District Council at Elm Street, when flood waters ran through the building.

- 7.15. Digitisation of a large percentage of the photographic collection has been assisted in the past by Community Assistance Grants and external fundraising. The value of such projects is highlighted when the facility is closed for any period. The Museum website continues to expand and improve and electronic newsletters reach an increasing database of Museum supporters.
- 7.16. Electronic access to heritage resources is an important trend for the future. The Museum has increased the number of items that can be viewed online including the Early Settlers database, Photo News and their photographic collections. More than 70,000 visitors came to the site in 2014/15 and collectively viewed more than 700,000 web pages. This does not include The PROW website.

New Technology

- 7.17. The Museum is a partner in the Nelson Marlborough Institute of Technology (NMIT) devised "Augmented Reality" project, which received New Zealand on Air funding in 2013. This is a smart phone application that allows recognition of an object/place to tie in with additional research information. Previous partnerships with NMIT have allowed for the loan of ipads and smart phone applications to enhance visitors' experiences.

Community Involvement

- 7.18. The Museum has taken an active leadership role in the World War One commemoration activities. Co-ordination of volunteer researchers has formed the basis for a range of community activities. From August 2014 the upstairs gallery has had a variety of chronological displays opened up around a replica village hall. This contains a list of service personnel from Nelson who served in World War One . Each is marked by a poppy when their living relatives visit and tell their stories. As at July 2015 1000 poppies have been added. As each 100 year anniversary of death is reached a white cross goes by the name. An increase of visitors is thought to be linked to ANZAC activities.

Museum Standards

- 7.19. Nelson Provincial Museum collection standards have been reviewed in recent reports prepared about storage issues by Octa and Alan Stewart.

Reporting

- 7.20. Museum reports six monthly to the Council on its Statement of Intent.
- 7.21. Financial sustainability is dependent on continued support from Tasman District Council and Nelson City Council.

Learning experiences outside the classroom (LEOTC)

- 7.22. In 2013 and 2014, 7,500 and 6800 students students visited education programmes provided by the Museum. The audited feedback from schools is overwhelmingly positive

Issues

- 7.23. The current storage facility at Isel Park will be full, in terms of large objects, by the end of 2014. The collection policy was reviewed in 2010 and whilst no reductions have occurred, very few new purchases have been made. The Museum staff have improved the way they use existing storage. As the Museum is a regional facility, the solution and costs for future storage need to be agreed and shared between the two councils.
- 7.24. Tasman District Council has indicated it wants to review the operations and facilities provided at the Museum.
- 7.25. Management of collections and the collection policy will influence any storage decision. Ability to access information and view items electronically may affect how items are recorded and retrieved in the future.
- 7.26. TBHT leases land at Isel Park for the operation of the Nelson Provincial Museum research facility. The lease expires in 2022. The community lease is for the land only, and is set at a low rental of \$451.00 per year. The Museum is a joint funding responsibility for Tasman District Council and Nelson City Council although the facility is housed within Nelson City Council's rate paying area, and problems with it are directed to Nelson City Council.
- 7.27. The Museum also fundraises for specific projects such as digitising collection images.
- 7.28. A study commissioned by TBHT identifies a shortage of quality storage space and a lack of appropriate facilities for staff, volunteers, and researchers. The key issues can be summarised as:
- Lack of space for storing objects
 - Lack of an appropriate environment for storage (primarily issues of humidity, temperature, and security)
 - Fire risk (work is required to reduce the fire hazard at the Isel Park facility and is estimated to cost between \$200,000 and \$300,000 excluding GST)
 - Reduced access to the collection as a result of inadequate storage facilities
 - Inadequate working facilities for staff and volunteers
 - Inadequate and unsecured facilities for visitors and researchers
 - Flood hazard
 - Proximity to animal pests (gaining access to the building through nearby trees)
 - Costs associated with travel between dispersed sites.
- 7.29. The report states that the storage at the Isel Park facility will reach capacity by 2014. The Museum has summarised its needs as:
- Safety of the collection

- Public access to collections for research
- Access to collections by museum staff to do research and development.

7.30. In 2014 TBHT commissioned a Strategic Review. This identified that the previous focus of the Trust on redeveloping its storage facilities needed to be re-considered in light of the new strategic direction proposed for the Museum. In the meantime the existing storage facilities can continue to be used. As a result, Council has not made provision in its LTP for capital works as the Trust's requirements need to be re-defined. Council will work with the Trust over the next year to progress this work.

Future Work

Work with TBHT around proposals arising from the November 2014 Strategic Review for the Museum.

- The appointment of a new CEO and new board members for the Trust in October 2015 may result in new priorities for discussion.
- Adopt new Memorandum of Understanding by 2018.

8. Other Heritage Activities

8.1. The following heritage activities represent a significant component of Council's contribution to supporting and developing community engagement. Nelson's heritage resources have been developed by Council in response to the need to provide information on Nelson's heritage. Given the increasing public interest in tracing family history and World War One commemoration activities nationwide, there is likely to be increased demand for these services.

8.2. Activities are aimed at preserving, protecting, gathering and sharing information on people who contributed to Nelson's development, important built and natural heritage features, public records and memorials. This is frequently done in partnership with community organisations or families who have an interest in heritage. Research information is often provided by members of the Nelson Branch of New Zealand Genealogical Society, Nelson Historical Society and Nelson Heritage Advisory Group.

Historic Memorial Sites

8.3. The Heritage Activity Management Plan covers activities relating to memorial sites such as operational and non-operational graveyards and public memorial sites in Council parks and reserves.

8.4. Cemeteries are valuable historic resources and Nelson's historic cemeteries tell important stories about its early European settlement. The cemeteries database on Council's website is the sixth most popular page. Page views in 2012/13 were 27,492, which was an increase from 26,391 page views in 2011/12.

8.5. Markers and maps have been developed to help people find some of the older sites. These will be upgraded and more cemetery information developed from

2015-18. Management of heritage headstones may be required if proposed changes in the law around cemetery management occur.

- 8.6. Nelson has a number of historic burial areas e.g. Fairfield Park, Hallowell, and Quaker cemeteries – that are now parks. Wakapuaka Cemetery was an early cemetery which is now closed, except for cremations. These historic areas contain a number of headstones that are severely decaying. At present Council does not need to maintain these as, under the Council's bylaws, they are considered the responsibility of the family. Heritage New Zealand is keen for local authorities to care for items over 100 years old but this would be a large unrecoverable expense for councils.
- 8.7. A useful management strategy could be to have a photographic record of grave stones, digitised and attached to Council's cemeteries database. Some of this work has already been started by various interest groups. To make this easier in future, as burials occur, it could be mandatory for photographic records to be made of burial sites. Where permission is given to replace an aged stone, or insert a new memorial, a rubbed image or photo of what is replaced could go on record with an image of the replacement. This would sit with records accompanying the cemetery listing.
- 8.8. The Early Settlers database holds information listed on the Wakefield Quay memorial, and links to articles and photos relating to settlers, which is added to on an ongoing basis. It was taken over by the Nelson Provincial Museum in 2013.
- 8.9. Memorials are being added to Geographic Information Systems (GIS) maps during 2013/14. This makes it easier to link separate pieces of information to map co-ordinates, which speeds up the rate at which research is made available.

Research Resources

- 8.10. Bloodline is a reference guide developed by Nelson Libraries. It is updated regularly and is available in print and online at the Council library site. Public courses are run regularly to help the public learn how to use research facilities.

Walks/ Interpretative Panels

- 8.11. Council has funded the development of heritage walks within Council boundaries, supported by historical information, maps, signs, and markers. There are downloadable podcasts for many of the walks. Three promotional video clips, about Wakefield Quay Art, Queen's Gardens and a war memorials trail, are on the Nelson Tasman Tourism and Council websites and are also used on social media.
- 8.12. Heritage walks promote familiarity and interest in historic sites. Walks link with interpretative panels and stories on the PROW website and all are created at the same time to tap into the same research. QR codes and smart phone applications are being investigated to increase public appreciation of Nelson's heritage.

- 8.13. NMIT's Augmented Reality project will use research information from existing walks and interpretative panels. The system to be used on smart phones and electronic devices uses technology that recognises a site and brings up information about it, such as what the building may have looked like in an earlier century, who lived there and their story.
- 8.14. Council has erected a number of interpretative panels in key historic sites which explore a variety of heritage themes. The interpretative panels provide focal points, around which walks are linked. Council will continue to increase the number of these panels across key sites.
- 8.15. Council will continue to work with Nelson Tasman Tourism to promote heritage activities as part of the tourist experience.
- 8.16. Currently, guided walks are offered during Heritage Week and in conjunction with city festivals. These walks are led by the Arts and Heritage Adviser and volunteers. Guided heritage walks are offered in other New Zealand cities conducted by volunteers or run as a business. Those that use a paid co-ordinator for volunteers charge a small fee to visitors to make the service cost neutral.

Heritage Week

- 8.17. Council runs Heritage Week in April to coincide with World Heritage Day on 18 April, and it has a new theme each year. Heritage Week is an opportunity to promote Council's heritage facilities, and exhibitions are run in the Heritage Houses, Museum and libraries. Council activities such as the PROW, heritage walks and panels, Heritage Incentive Fund and Heritage Awards are celebrated. The week also highlights heritage activities and organisations within the community. It includes and supports several community run, heritage focused, events.

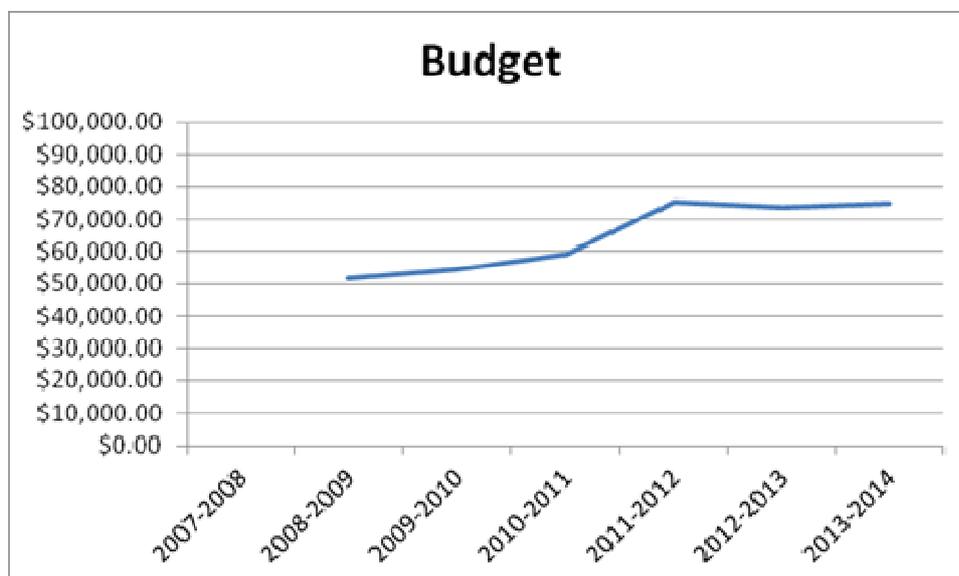
The PROW Website

- 8.18. Council contributes to "the PROW", a website featuring historical and cultural stories from Nelson, Tasman and Marlborough. It is included in the Community Facilities Activity Management Plan.

Heritage Fund

- 8.19. Following the adoption of the Whakatu Nelson Heritage Strategy in 2006, the Council established three avenues of financial assistance for heritage property owners and others who want to care for the city's heritage. This assistance for heritage acknowledges the private costs involved in protecting heritage for public benefit.
- 8.20. The three avenues are:
- 8.20.1. Zero fees for resource consents for non-notified applications to conserve and restore a heritage item.
- 8.20.2. Rates remission for maintenance of heritage properties. Application is required for up to 50% remission for Category A and up to 25% remission for category B heritage items.

- 8.20.3. The Heritage Project Fund. This is a contestable fund for individuals and groups seeking financial assistance towards a specific project, costing a minimum of \$1,000, that relates to the upkeep of a heritage building, object, or site. Grants are available to maintain, repair, restore, stabilise, and provide advice and work for statutory seismic strengthening of buildings, objects, and sites that are identified in the Nelson Resource Management Plan.
- 8.21. The Heritage Strategy 2006 (p13, section 2.8.2) says that Nelson will have “targeted rates relief for the highest heritage value buildings (Group A and B listed buildings in the Nelson Resource Management Plan; 50% for Group A Buildings; 25% for Group B) with a commitment to maintain in return.”
- 8.22. Remissions of rates for heritage maintenance operate in three year ‘cycles’: 2012-2015, 2015-2018, 2018-2021 etc. A successful application for a remission made in any year within a cycle remains valid until the end of that cycle.
- 8.23. By the end of the last cycle around 60% of eligible properties received a remission. The current cycle is tracking similarly, with a slightly higher uptake.
- 8.24. The budget for remissions has not been adequately maintained and in the past few years has levelled out. The effect of this is that the percentage and amount of remission granted has become smaller over time, as rates have continued to increase.



- 8.25. In the 2013/14 year, there were a number of property owners who received less than \$100, with the lowest amount at \$57. The percentages for remissions granted has dropped from 36.46% and 18.23% of the cost of the work for A and B properties in 2009/10 to 23.10% and 11.55% in 2013/14.

- 8.26. In order to maintain the commitment in the Whakatu Nelson Heritage Strategy 2006, an increase in rates remissions funding for eligible heritage properties is required. The following table shows three budget options and the expected increase in remission percentages.

Budget Options			
	\$97,500 (an additional \$32,500)	\$130,000 (an additional \$65,000)	\$162,500 (an additional \$97,500)
A	30%	40%	50%
B	15%	20%	25%

- 8.27. Consideration was also given to the option of lowering the cap from \$3,000 to either \$2,500 or \$2,000. However, the gains to make from lowering the cap are so small that this option is not recommended.

Heritage Project Fund

- 8.28. The Heritage Project Fund is regularly oversubscribed with applications seeking a total of more than \$200,000 each year. The amount available has grown from \$35,000 in 2007/08 to \$62,000 in 2013/14. There is an increasing number of applications relating to earthquake strengthening of heritage buildings. An increase to \$100k was made in 2015/2016.

Historic buildings owned by Council

- 8.29. Council purchases buildings to meet strategic needs. Their tenancies and maintenance are managed under the Property and Facilities Asset Management Plan. Two buildings of historic value owned by the Council are the Anchor Shipping & Foundry building and the State Advances Building. They both present opportunities for adaptive reuse. Both buildings have the potential to host heritage activities in keeping with their heritage values.

Funding Strategy

- 8.30. Rates are the primary source of funding for Council to fund heritage activities and events for the community. There are a number of other secondary sources of revenue such as rents, concessions, user charges, grants, donations and other sundry income. These all contribute to limiting the necessary rates take for each financial year.

Future Work

- 8.31. Investigate and trial different ways of using technology to encourage easier access to Nelson's heritage by linking PROW stories, interpretative panels and maps.
- 8.32. Consolidate the work of the Heritage Promotion Group and encourage wider use of community places – encourage more links with libraries, Nelson Provincial Museum, Theatre Royal, the Suter and the Nelson School of Music.

- 8.33. Review the Heritage Fund and the rates remission scheme for heritage properties.
- 8.34. Build the profile of the Heritage Awards during Heritage Week with assistance from the NZ Historic Places Trust, and increase community run events during the week.
- 8.35. Continue to create and install interpretative panels at historically important sites in Nelson.

Financial Forecast

- 8.36. The ten-year financial forecasts (2015-25) for the activities within heritage facilities are shown in Appendix 1 of this Plan.
- 8.37. The tables in Appendix 1 outline the funding required over the next 10 years to implement the recommended life cycle work programmes in this Activity Management Plan. Projections are shown in dollar values current as at 1 July 2014.
- 8.38. Depreciation is not shown in the financial forecast as the Activity Management Plan only covers part of the heritage activity. Buildings are covered by the Property and Facilities Asset Management Plan and depreciation is not funded for Founders Heritage Park.

Assumptions and Sensitivity Analysis

- 8.39. The following basic assumptions have been made in preparing the 10 year cash flow forecasts:
- All expenditure is stated in dollar values as at 1 July 2014 with no allowance made for inflation over the planning period.
 - Maintenance projections are based largely on historical unit costs and levels of expenditure.
 - Significant increases in the cash flow may result from more detailed evaluation of asset requirements.
 - Council will continue to be involved in providing community service.

Funding Strategy

- 8.40. Council's overall funding strategy is contained in its Funding Policy within the Community Plan. The degree to which Council is willing to fund activities is based on a number of principles as follows:

Beneficiary pays	Those who directly benefit should pay to a larger degree.
Public Good	Where there is overall public benefit Council should pay to a greater degree.
Intergenerational Equity	Council should recover costs for the provision of services from the generation that receives the benefit of each service or activity.

Exacerbator Pays	Where costs are incurred due to the negative effects of people's actions (or inaction) then these people should pay.
------------------	--

Confidence in Financial Forecasts

8.41. Confidence grades are based on the following:

- A** Highly reliable
- B** Reliable
- C** Uncertain
- D** Very uncertain

Cost Area	Confidence Grade	Reason
Operations & Maintenance	B-C	Reasonably high degree of confidence in contract prices.
Renewals	C	Confidence fairly high in first year of the renewals programme then becoming less certain. Move towards more use of condition assessments and asset life data to predict renewal requirements, resulting in greater accuracy of replacement timing and costs.
Capital Development	A-C	Generally very reliable for the first 2 years before dropping to a B rating in years 3 and 4 and then to C in years 5 -10.
Disposal	B	Disposal of assets at Founders Heritage Park – timing uncertain.

Income/ Expenditure Type	Code Description	14/15 Actual \$	15/16 Est \$	16/17 Est \$	17/18 Est \$	18/19 Est \$	19/20 Est \$	20/21 Est \$	21/22 Est \$	22/23 Est \$	23/24 Est \$	24/25 Est \$
<i>Managing Heritage</i>												
<i>Programmed Expenditure</i>	<i>Heritage Activities Programme</i>	61,325	60,632	60,632	60,632	60,632	60,632	60,632	60,632	60,632	60,632	60,632
	<i>Grant: Fairfield House</i>	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
<i>Museum</i>												
<i>Base Expenditure</i>	<i>Grant: NN Provincial Museum</i>	834,899	834,138	834,138	834,138	834,138	834,138	834,138	834,138	834,138	834,138	834,138
	<i>Grant: TBHT Top- Up</i>	69,297	70,406	70,406	70,406	70,406	70,406	70,406	70,406	70,406	70,406	70,406
<i>Financial</i>	<i>Interest</i>	121,550	184,543	310,293	308,489	312,699	318,111	325,928	328,935	331,942	337,354	339,158
<i>Use of Funds</i>	<i>Museum Storage</i>	0	3,436,430	0	0	0	0	0	0	0	0	0
<i>Isel House</i>												
<i>Income</i>	<i>Isel House Lease</i>	0	(215)	(215)	(215)	(215)	(215)	(215)	(215)	(215)	(215)	(215)
<i>Base Expenditure</i>	<i>Prepare Business Plan</i>	0	3,000	0	0	0	0	0	0	0	0	0
<i>Melrose House</i>												
<i>Income</i>	<i>Melrose House Rent</i>	(200)	(215)	(215)	(215)	(215)	(215)	(215)	(215)	(215)	(215)	(215)
<i>Base Expenditure</i>	<i>Prepare Business Plan</i>	0	0	3,000	0	0	0	0	0	0	0	0
<i>Broadgreen House</i>												
<i>Base Expenditure</i>	<i>Telephones</i>	1,245	1,650	1,650	1,650	1,650	1,650	1,650	1,650	1,650	1,650	1,650
	<i>Electricity</i>	4,894	3,809	3,809	3,809	3,809	3,809	3,809	3,809	3,809	3,809	3,809
	<i>Water</i>	737	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200
	<i>House Cleaning</i>	3,524	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500

	<i>Security</i>	2,306	3,200	3,200	3,200	3,200	3,200	3,200	3,200	3,200	3,200	3,200
	<i>Prepare Business Plan</i>	0	3,000	0	0	0	0	0	0	0	0	0
<i>Founders Heritage Park</i>												
<i>Income</i>	<i>Bookfair Proceeds</i>	(135,030)	(125,000)	(125,000)	(125,000)	(125,000)	(125,000)	(125,000)	(125,000)	(125,000)	(125,000)	(125,000)
	<i>Donations</i>	(237)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)
	<i>Rent: Shop Leases</i>	(96,948)	(100,000)	(100,000)	(100,000)	(100,000)	(100,000)	(100,000)	(100,000)	(100,000)	(100,000)	(100,000)
	<i>Rent: Caretakers House</i>	(400)	0	0	0	0	0	0	0	0	0	0
	<i>Venue Hire Fees</i>	(30,049)	(35,000)	(46,000)	(46,000)	(46,000)	(46,000)	(46,000)	(46,000)	(46,000)	(46,000)	(46,000)
	<i>Public Events Hire Fees</i>	(20,636)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)
	<i>Conferences Hire Fees</i>	(8,070)	(1,575)	(1,575)	(1,575)	(1,575)	(1,575)	(1,575)	(1,575)	(1,575)	(1,575)	(1,575)
	<i>Admission Charges</i>	(47,117)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)
	<i>Backpackers Special</i>	(374)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)
	<i>Staff Run Park Events</i>	0	(10,000)	(10,000)	(10,000)	(10,000)	(10,000)	(10,000)	(10,000)	(10,000)	(10,000)	(10,000)
	<i>Anzac Apple Day</i>	(7,724)	0	0	0	0	0	0	0	0	0	0
	<i>Ticket Sales Sunday Jazz</i>	(3,362)	(2,000)	(2,000)	(2,000)	(2,000)	(2,000)	(2,000)	(2,000)	(2,000)	(2,000)	(2,000)
	<i>Kai Festival</i>	(4,102)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)
	<i>Sundry Income</i>	(873)	0	0	0	0	0	0	0	0	0	0
	<i>Deacquisition Income</i>	(435)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)
	<i>Shop Sales</i>	(25,868)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)
	<i>Cost of Sales: Shop Purchases</i>	10,775	16,000	16,000	16,000	16,000	16,000	16,000	16,000	16,000	16,000	16,000

	<i>Cost of Sales: Book Fair Expenses</i>	28,659	28,000	28,000	28,000	28,000	28,000	28,000	28,000	28,000	28,000	28,000
	<i>Recoveries: Water</i>	(3,114)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)
	<i>Recoveries: Sundry</i>	(157)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)
	<i>Recoveries: Electricity/Phone</i>	(42,231)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)	(40,000)
<i>Base Expenditure</i>	<i>Volunteer Expenses</i>	3,092	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
	<i>Telephones</i>	5,363	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000
	<i>Electricity</i>	49,895	51,021	51,021	51,021	51,021	51,021	51,021	51,021	51,021	51,021	51,021
	<i>Water</i>	10,055	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000
	<i>Rubbish Removal</i>	4,745	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
	<i>Building Cleaning</i>	21,957	21,000	21,000	21,000	21,000	21,000	21,000	21,000	21,000	21,000	21,000
	<i>Marketing & Promotion</i>	18,003	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000
	<i>Security</i>	4,185	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500
	<i>Commission</i>	5,664	3,200	3,200	3,200	3,200	3,200	3,200	3,200	3,200	3,200	3,200
	<i>Valuations / Surveys</i>	2,865	3,284	3,284	3,284	3,284	3,284	3,284	3,284	3,284	3,284	3,284
<i>Unprogrammed Expenditure</i>	<i>Event and Hall Hire Expenses</i>	18,055	18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000
	<i>Sunday Jazz Expenses</i>	2,983	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
<i>Programmed Expenditure</i>	<i>Development Fund Expenditure</i>	72,647	37,000	37,000	48,500	48,500	48,500	48,500	48,500	48,500	48,500	48,500
	<i>Sundry Operating Expenses</i>	10,371	10,575	10,575	10,575	10,575	10,575	10,575	10,575	10,575	10,575	10,575
	<i>Staff Run Park Events Expenses</i>	0	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
	<i>Displays</i>	10,195	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000	12,000

	<i>Anzac Apple Day Expenses</i>	9,180	0	0	0	0	0	0	0	0	0	0
	<i>Kai Festival Expenses</i>	5,184	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
<i>Heritage Incentives</i>												
<i>Unprogrammed Expenditure</i>	<i>Resource Consent Discounts</i>	0	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
<i>Programmed Expenditure</i>	<i>Rates Remissions</i>	66,811	67,000	67,000	67,000	67,000	67,000	67,000	67,000	67,000	67,000	67,000
	<i>Heritage Project Fund</i>	61,564	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
<i>Income</i>	<i>Grants: The PROW Digital Stories</i>	(2,448)	0	0	0	0	0	0	0	0	0	0
	<i>Prow and Library Website Mtce</i>	4,208	9,000	27,500	11,500	11,500	27,500	11,500	11,500	27,500	11,500	11,500