



2018-28 Heritage Activity Management Plan



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1 Executive summary

1.1 ***Goal of the Activity:***

- 1.1.1 To provide heritage activities in Council-owned heritage assets and in the wider community, in the most cost effective manner. Heritage assets include Founders Heritage Park, historic heritage houses, Nelson Provincial Museum (jointly with Tasman District Council), and historic memorial sites. Activities include Heritage Week, historic walks linking with interpretive panels, the Heritage Project Fund, heritage awards, and the PROW website. This AMP does not cover asset management of heritage buildings; that is included in the Property and Facilities Asset Management Plan (A1654726).
- 1.1.2 Heritage buildings such as the heritage houses 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
- 1.1.3 Founders Heritage Park is performing well at present. Council will continue to encourage revenue from commercial activities to maintain this development. The goal is to better establish a hybrid model of both commercial and community activities at the Park.
- 1.1.4 A Founders Park 10 year strategy is under development to support improvement of the visitor experience and increasing commercial opportunities such as conferencing.

1.2 ***Summary Levels of Service (LOS) performance:***

- 1.2.1 Founders Park LOS have been met with the Park reporting the achievement of 95% occupancy over the last 12 months, generating over \$100,000 of rental income. More than eight public events have been run at the Park and conference-related bookings remain at 2-3 per year. Venue hire including weddings, events and conferences generated \$72,934 in income in 2017/18.
- 1.2.2 LOS have also been met for Heritage Houses with visitor numbers and bookings increasing across all facilities, two new or enhanced displays provided at each facility, and more than three meetings per year held with volunteer and stakeholder groups of the facilities.
- 1.2.3 The Heritage Project Fund and the rates remission scheme are fully subscribed and well utilised.
- 1.2.4 LOS have been met for interpretive panels with two new panels installed in 2017/18 and two more planned for 2018/19. In addition a new process has been created for collecting and assessing subjects for panels and gathering the views of Iwi on those ideas prior to production.
- 1.2.5 Heritage Week LOS have been met and exceeded from at least two community led events held during Heritage Week annually to over 40 community led events in 2018's rebranded "Nelson Heritage Festival". This community run event model is to be repeated in 2019.

2 Introduction

2.1 Purpose of this Activity Management Plan

- 2.1.1 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 covers heritage building asset management, so these issues are not addressed in this plan.)
- 2.1.2 To revise and update the Heritage Activity Management Plan 2015-2025, and to inform Council's Long Term Plan 2018-28. It incorporates the most current strategic planning for the Council's heritage activities.

2.2 Activities included in the Plan

Programmes and activities covered by this Plan are:

2.2.1 Founders Heritage Park

2.2.2 Historic Houses:

- Broadgreen Historic House
- Isel House
- Melrose House

2.2.3 Other Heritage Activities:

- Heritage Week/ Nelson Heritage Festival
- Historic Memorial Sites
- Walks/ Interpretive Panels
- Heritage Fund
- The PROW Website

2.2.4 Exclusions from this plan:

- 2.2.4.1 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.
- 2.2.4.2 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.
- 2.2.4.3 Tasman Bays Heritage Trust (TBHT) operates Nelson Provincial Museum, on the strength of financial contributions by Nelson City Council and Tasman District Council. TBHT is a Council Controlled Organisation (CCO) and is subject to a separate reporting cycle.

3 Key Stakeholders

- 3.1 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.
- 3.2 Stakeholders identified in this Plan are:
 - Tasman District Council
 - Nelson Provincial Museum
 - Local Iwi
 - Melrose Society
 - Broadgreen Society
 - Friends of Founders Heritage Park
 - Friends of Old Fairfield
 - Nelson Historical Society
 - Heritage Nelson
 - Heritage New Zealand
 - Department of Conservation
 - Nelson Branch of NZ Genealogical Society
 - Nelson Regional Development Agency
 - Local visitors and tourists

4 The Legislative Context

- 4.1 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.
- 4.2 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.
- 4.3 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. This policy statement and this management plan are under current review, in development of a combined "Whakamahere Whakatu Nelson Plan."

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.

5 The Strategic Context

5.1 Relationship to the Nelson Long Term Plan

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. The strategic direction set in each Long Term Plan provides the context for each subsequent Activity Management Plan, when it is reviewed.

5.2 Building and Maintaining Strong Relationships With Iwi/Māori

- 5.2.1 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. Council will play its part by supporting iwi to protect, promote and celebrate their rich cultural heritage.
- 5.2.2 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 Tauihu (Top of the South) is broader than Council boundaries, by continuing to support initiatives that promote understanding of Maori culture and tikanga.
- 5.2.3 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.
- 5.2.4 Iwi management plans are prepared under the Treaty of Waitangi and have status under the Resource Management Act 1991. Nga Taonga tuku 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 and respond to these issues.
- 5.2.5 Tangata whenua cultural heritage sites (which includes archaeological sites) in Council parks and reserves are reported under the Parks and Reserves Activity Management Plan; e.g., the Rushpool Argillite mines.
- 5.2.6 Tangata whenua cultural heritage sites will be identified in and managed by the Nelson Resource Management Plan, where appropriate. Additional sites are considered too sensitive to publicly identify at present.

5.3 Social Wellbeing Policy 2011

- 5.3.1 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.

- 5.3.2 Heritage activities are consonant with the building of iwi/Maori relationships as noted above, which is included in this Policy.

- 5.3.3 Understanding the local heritage and stories helps develop a sense of the Nelson culture and enhances feelings of belonging.

5.4 Nelson 2060/ Sustainability

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

- The need to maintain and enhance the quality of the environment
- The reasonably foreseeable needs of future generations
- Adherence to Council's four sustainability principles:
 - Environmental
 - Social
 - Economic
 - Cultural

- 5.4.2 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.

- 5.4.3 Nelson 2060 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 (noted above), and represent value for money.

- 5.4.4 The activities described in this Plan contribute to the Nelson 2060 vision for heritage outlined above and to sustainability principle four (i.e., "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).

6 Key Issues for this Activity:

Issue	Planned Solution	Indicative Timeframe	Cost Estimate
Interpretive panels: Lack of iwi heritage information in interpretative panels. No budget for maintenance of panels.	Discussions with iwi to identify opportunities for panels at sites of significance. Develop maintenance schedule, allowing for replacement and damage repair of panels.	Short term (1-3 years) Long term (11+ years)	Staff resource. Approximately \$3,000 per annum.
Heritage Houses and Founders Heritage Park: Maximise staff time of Council officers.	Work more closely and collaboratively across the Houses and the Park. Annual work programmes developed over all four facilities will offer greater value for money.	Short term (1-3 years)	Staff resource.
There is a need for a strategic plan for Founders Park. Ensure park direction is planned.	Develop a Founders Park 10 year strategy to improve visitor experience alongside commercial opportunities such as conferencing	Short term (1 year)	Staff resource
There is a need for a new Heritage Strategic Plan; previous plans are out-of-date. No budget for strategic planning.	Consult and prepare a Plan. Action: Request budget rollover of \$15,000 for consultant, in the 20 / 21 LTP to allow time for Founders Park strategy to be developed.	Short term (1-3 years)	\$20,000

Heritage Houses: Heritage properties currently have limited use (lack adaptive reuse). Low visitor numbers at some facilities. It is important to maintain a connected heritage sector to maximise on partnerships that promote shared opportunity and alignment.	<p>Attract permanent tenants who can contribute to activity and increase visitor numbers.</p> <p>Develop improvements to signage and publicity, including: wayfinding, road signage, brochures, webpages, and social media that promote the heritage facilities.</p> <p>Establish clear positioning for each of the houses and develop programmes and exhibitions that enhance their points of difference, while aligning with rest of sector activity.</p> <p>Joint planning of heritage activities across the sector to build a stronger profile in the community. Key achievements to date where joint activity has happened are Nelson Heritage Festival and the Cultural Heart/Heritage Houses promotional leaflets</p>	Short term (1-3 years) and Medium term (4-10 years)	Staff resource.
Lack of focus for collections. Out-of-date building conservations plans.	<p>Stronger connectivity between regional heritage asset, e.g. Nelson Provincial Museum archives, shared care and protection of objects, and development of programmes and exhibitions across regional institutions.</p> <p>Amend leases for heritage houses to ensure alignment of lease expiry dates would assist with future planning.</p> <p>Create clear collection policies for council-owned collection.</p> <p>Update conservation plans for Broadgreen and Isel Houses.</p> <p>The development of a strategic business plan for each house that considers individual and joint</p>		

Issue	Planned Solution	Indicative Timeframe	Cost Estimate
	strengths and develops a combined marketing plan.		
Broadgreen House: Displays do not currently represent the house's extensive textile collection.	<p>Provide a display focus on the House's extensive textile collection.</p> <p>Ensure continuous care of the textile collections (including insurance coverage).</p> <p>Investigate the digitization of the collection to assist with preservation and accessibility.</p> <p>Consider joint projects with others in the textile sector, e.g. links with WOW and their textile collection.</p> <p>Extend retail range to include more products such as textiles, preserves, Victorian and Rose themed items (potpourri, cosmetics, Christmas cards, etc.).</p>	Short term (1-3 years) and Medium term (4-10 years)	<p>Staff resource.</p> <p>\$800 per annum</p>
Make adaptive reuse of Glasshouse.	Explore placement of a small café in this space.	Short term (1-3 years)	Staff resource.
Isel House: Lack of identity within heritage sector.	Increased connection with Stoke community and partnership with provincial museum to support Isel's relevance within Stoke; e.g. focus of exhibitions on Stokes history – botanic, agricultural and cultural.	Short term (1-3 years)	Staff resource.
Make best use of the space at Isel.	Use existing rooms differently and create/ define areas: exhibitions, programming, activity rooms, and food outlet.	Short term (1-3 years)	Staff resource.

Issue	Planned Solution	Indicative Timeframe	Cost Estimate
Founders Park: Book fair loan will be fully repaid in 2017/18; then to provide approximately \$100,000 of income per annum, to be reinvested into the park.	Strategic Development Plan to be prepared and presented to Council to provide guidance on priority projects. This will promote development of the visitor experience alongside development as an economic activity. This hybrid approach will ensure that community and commercial goals of the Park are achieved.	Short term (1-3 years)	Staff resource.
Commercial tenancies need to be maintained at 90%, and community leases maintained at 10%.	Applications for community leases must receive approval of the Community Services Committee. Commercial tenants who wish to build a new attraction within the Park will be encouraged, as space permits	Long term (11+ years)	Staff resource.
A pricing review for venue hires needs to be completed and implemented.	Venue hire charges for commercial activities are likely to increase.	Short term (1-3 years)	Staff resource.

7 Levels of Service 2018/2028

7.1 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 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.	Review the Council's collection management policies 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.
	Council's collection items and displays are used to tell Nelson's heritage stories and attract visitors to the heritage facilities.	Council co-ordinates regular meetings amongst heritage facilities to ensure co-ordination of heritage events and activities.	Three meetings held per year.
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.
		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 or above 2016/17 levels.
		Information about historic memorial sites information is publicly accessible on interpretative panels, the PROW or on other created resources.	Consolidation of panels to enable better promotion and accessibility to existing panels; to consider a digital/ app solution.

	Level of Service	Measures	Targets
Historic Sites	The community can easily access information about Council-owned historic sites.	An annual event highlighting Nelson's heritage is coordinated and promoted by Council and includes community led events and promotion of public and private heritage sites, organisations and activities. 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 Festival Week.
Nelson Heritage Festival	Council provides a range of opportunities for the community to be involved in activities which promote and celebrate heritage in Nelson.	Use of technology to showcase heritage information.	By 2018 one new or updated method to convey heritage information has been trialled, which can be measured electronically.
		Level of support for WWI projects.	One further significant WWI commemoration project being completed in 2018.
WWI Commemoration 2013-2018	Council supports the World War One (WWI) Centenary Commemorations.	Uptake of funds by projects meeting the criteria.	The Fund is fully subscribed and funds are used.
Heritage Project Fund	Assist the community to retain, or adapt for better use, heritage items listed in the NRMP (and in its successor, The Nelson Plan).	Uptake of funds by properties meeting the criteria.	All funds are used.
Heritage rates remission scheme	Provide funding to give rates relief on specified heritage properties.	Funds are appropriately utilised.	Applications are considered against criteria.

8 Trends Affecting Demand for Heritage Activities

8.1 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. Conversely, the number of children is expected to decrease after 2018.

8.2 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 need to work in pairs in the Heritage Houses in case of a public or personal emergency.

8.3 Our heritage attractions have the potential to provide satisfying opportunities for **volunteers**.

8.4 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.

8.5 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.

9 Founders Heritage Park

9.1 Description of the Activity

- 9.1.1 Founders Heritage Park (the Park) is set out as a "Heritage Village," comprising 32 wooden buildings on about five hectares of landscaped reserve on Atawhai Drive, close to Nelson's Central Business District.
- 9.1.2 The Park tells 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 Bristol Freighter aircraft, a lake, a children's playground, and a leased, functioning Heritage Railway (operated by a Trust). The most significant attraction inside the Park is the leased McCashins Hop Garden café & bar.
- 9.1.3 Locals have free entry into this facility. The Park has three main sources of income: admission charges, venue hire and tenancies. During the 2017/18 year **47,541** visitors were recorded during the Park's usual opening hours with 72% Nelson/Tasman local visitors, 16% domestic visitors (from New Zealand – but not Nelson), 12% international visitors. This equates to 13,409 paying visitors generating over \$52,297 in admission fees. Of the 34,132 local non-paying visitors 90% were from Nelson and 10% from Tasman. These numbers reflect the slightly reduced patronage during the period when the café was closed.
- 9.1.4 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 \$72,934 in 2017/18.
- 9.1.5 There are 26 separately tenanted buildings/rooms which are leased out to various small businesses and community organisations in 2017/18. They contribute to the

Park's vitality and income, and generated income of \$112,944. 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 \$112,944 in 2017/18 has occurred. Part of this is the result of the introduction of community lease rates, and partly from requirement about a caretakers lease.

- 9.1.6 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. The net contribution to Council for Founders from the 2018 Book Fair was \$126,651.
- 9.1.7 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.
- 9.1.8 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.

9.2 Relationship with other Council Heritage Assets

- 9.2.1 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.
- 9.2.2 The Park leads many of the Heritage sector promotion activities and participates in cluster advertising and promotion of heritage activities such as the "Cultural Heart" brochure.

9.3 Founders Strategic Direction

9.3.1 *Strategic Vision and Mission:*

- ***Vision:*** Founders Heritage Park aims to connect visitors and the community to the region's past, whilst offering opportunities to create new memories and to add to the cultural fabric of our region. The Park will provide opportunity for both community events and commercial activities to flourish, in a hybrid approach.
- ***Mission:*** Founders Heritage Park is a versatile facility, with a focus on family friendly activities, offering affordable experiences for the visitor.

9.3.2 *Strategic Goals:*

1) Create Living Spaces

- Developing spatial plan for future development so development is not so ad hoc. To include cultural spaces, community spaces, industrial activity, service infrastructure requirements, playgrounds, outdoor spaces, seats, walkways, toilets, sculpture park, etc.
- Develop interactive play equipment and activate spaces.
- Improve venue facilities to ensure core venue offering is achieved across all venues – examples are: Wifi, additional heating and lighting bars, ceiling and kitchen in Energy Centre, and cash machine.

2) Be Connected (*includes developing partnerships*)

- Complete a visitor-centric, Way-Finding project inside the Park, assist tenants to attract visitors, encourage people to stay longer, inside and outside the park to increase audience.
- Build on the relationship with Whakatu Marae to develop the space between neighbouring sites. Ideas include “virtual waka”, restoration/incorporation of portion of waka at Marae, flax garden, boardwalks, weaving shed, local iwi stories relating to land and sea of area.
- Work closely with other cultural and heritage institutions in the region to ensure increased profile and wellbeing of cultural and heritage sector.

3) Telling our regional story

- Develop exhibitions annually.
- Digitise enough of the collection to use as a resource (e.g., 500 collection items with strong Nelson provenance).
- Update collection policy.
- Incorporate story-telling to the outdoor experience (into living spaces).
- Ensure ground floor tenants contribute to this goal, and ensure criteria reflects this.

9.4 Future Work

- 9.4.1 An accessibility audit (document A1133058) was commissioned in 2012 and has identified priorities. Work will continue to improve the accessibility of the facilities.
- 9.4.2 Cultural space – continue to work with Whakatu Marae to develop a shared cultural park. Seek ways to incorporate iwi heritage.
- 9.4.3 Future growth – encourage established and new tenants to invest in the facility.
- 9.4.4 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.
- 9.4.5 Continue to improve buildings where required to ensure a versatile events/conference venue is provided.
- 9.4.6 Improve and expand free wifi coverage at key points in the Park.

- 9.4.7 Explore and implement opportunities for a more co-ordinated approach to Council's heritage assets. Further planning is required in this area.
- 9.4.8 Review venue pricing to ensure it is in line with other similar commercial facilities in the region, while also allowing community events to be hosted in the park. Maintain a balance of commercial and community events.
- 9.4.9 Improve one major display per year, including but not limited to: Nelson Mail building, cultural space, and Mechanical/ Agricultural area. Recent examples of this have included the Hop Museum and Newmans Livery Stables.

10 Heritage Houses

10.1 Description of Activity

- 10.1.1 The Broadgreen, Isel, and Melrose 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 properties¹.
- 10.1.2 Melrose and Broadgreen are managed 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. Broadgreen Historic House is also owned and managed by Nelson City Council, supported by Broadgreen Society who manage volunteers to keep the house open year round. The Society also holds a footprint lease with Council for which the Broadgreen Centre is located.
- 10.1.3 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.
- 10.1.4 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. The cost to the ratepayer would be higher, without their assistance. Council staff mount exhibitions, and are involved in curation, marketing, promotion and some administration. A stable base of volunteers for the Friends groups will help ensure that these properties are to continue to operate and open to the public.
- 10.1.5 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

¹ Reserves are managed under the Parks and Reserves Asset and Activity Management Plans

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.

- 10.1.6 The opening hours 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.
- 10.1.7 The Friends groups for Melrose and Broadgreen have each gathered collections to display within their 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 degrees. Melrose Society owns the collection used in the house. Council owns the Broadgreen Historic House collection.
- 10.1.8 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, 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 café, a residential flat, and space under renovation. All are set in magnificent gardens with opportunities to link external use with internal use.
- 10.1.9 Popular activities are held in gardens adjacent to Heritage Houses such as the Council funded Among the Roses at Broadgreen, Bloom and the Teddy Bears Picnic at Isel,. Such activities raise awareness of the location of Heritage Houses and encourage appreciation for their setting.
- 10.1.10 Heritage Houses can benefit by running fundraising activities when Council festivals and events occur. All houses contribute to cluster heritage sector promotion along with the Nelson Provincial Museum, Founders Heritage Park, and Fairfield House.
- 10.1.11 Since July 2015, Founders Heritage Park, the three Heritage Houses, and all Council-run heritage activities have come under management in the Libraries and Heritage business unit. Joint marketing, creation of exhibitions and activities, curation, health and safety and development of the special nature of all Heritage Houses is discussed in business plans for each facility and a combined overarching plan is to be developed.

10.2 Broadgreen Historic House

- 10.2.1 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.

10.2.2 Adjacent to the House is 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.

10.2.3 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.

10.2.4 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.

10.2.5 Council is prepared to make five-year extensions on the lease, subject to the Society having the capacity to operate the Centre.

10.2.6 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.

10.2.7 The majority of Broadgreen operational costs relate to Council staffing, in particular programming, curatorial, and managerial salary support from the Libraries & Heritage business unit. Council staff are on site during summer (October-May). Broadgreen Historic House volunteers will continue to open the house, and provide reception services and guides year-round with available volunteers working in pairs, for health and safety requirements to be met. Opening hours reflect volunteer availability; winter (June-September) hours are 11am - 3pm.

10.2.8 In September 2015 Council changed the opening hours of Broadgreen House. Later in 2015, there was a review of the financial responsibilities between Council and the Broadgreen Society, and a new financial agreement was signed in January 2016.

10.2.9 There is limited storage capacity at Broadgreen House and Centre. The textile collection is well cared for in a humidity-controlled, purpose-built room within the centre.

10.2.10 Since early 2017 staff have been working closely with a volunteer educator to develop school programmes and holiday activities at Broadgreen House. These have proven to be very well received to date, impacting on increased visitor numbers.

11.3 Broadgreen House Strategic Direction

11.3.1 *Strategic Vision and Mission:*

- ***Vision:*** Broadgreen Historic House is to bring Nelson's domestic heritage and our significant textile collection to life.
- ***Mission:*** To develop a full offering which inspires and involves our visitors to reflect/ understand early Nelson domestic history; to tell stories utilizing our significant textiles collections; and with themes from the Buxton (1855) and Langbein (1920's – 1950s) families.

11.3.2 *Strategic Goals:*

1) *Exhibition / Programmes:*

- Create a strong textile identity.
- Develop a dynamic programming and exhibitions related to the House's domestic provenance and its collection.
- Develop a strong connection to the Rose Garden.
- Collection/ Textiles.
- Investigate ways to make the collection more accessible, with regular changing exhibition and digitization components.
- Ensure entire collection and supporting documents are digitized.
- Continue to preserve the collection.
- Update the collection policy.

2) Collaboration (externally):

- Develop links with textile focus and consider joint projects with others in the textile sector/ industry/ collections.
- Identify who else is involved in the domestic heritage sector and consider partnership projects.
- Work with local Rose/Garden clubs to celebrate and promote the Rose Garden, and investigate opportunities to deliver garden tours.

3) Partnerships (internally):

- Maintain a strong relationship with the Society, who manage volunteers/guides to enable the house to be open to the public.
- Develop partnerships with Nelson Provincial Museum textiles department and others in this specialized sector (regionally, nationally and internationally).

4) Communication:

- Develop branding and signage.
- Understand target market focus on visitors/ attraction/ destination.
- Digitize and develop social media presence.
- Be included in the Heritage Cluster.

5) Financial Goals:

- Increase paying visitor numbers.
- Develop related shop offering/ merchandise/ retail experience.
- Explore addition of a café in the glasshouse.

10.4 Isel House

10.4.1 Isel House was built in the late 19th century. The house is set in the 7.16 hectare Isel Park, Stoke, which is maintained by Council. The house opened to the public in 2003.

10.4.2 A number of valuable Nelson Provincial Museum collection items are on display in the Isel exhibition space.

10.4.3 The building is in structurally sound condition. The restoration of the house is to the International Council on Monuments and Sites (ICOMOS) NZ Charter standards. There is a recent conservation plan which can be used to guide further restoration.

10.4.4 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.

10.4.5 The Garden Café at Isel serves the public during the summer months, utilising the space at the back of the House.

10.5 Isel House Strategic Direction

10.5.1 Strategic Vision and Mission:

- **Vision:** Isel House is to be a thriving heritage and botanical hub which enriches the lives of our local community.
- **Mission:** Isel House and Park is to be a platform to understand Stoke's history, focusing on the botanical and agricultural fields, arts, crafts and culture.

10.5.2 Goals:

1) Communication

- Develop branding and signage
- Understand target market
- Digitize and develop social media presence
- Be included in Heritage cluster

2) Collaboration (externally)

- Look for clubs, groups and tenants who can help us achieve our vision
- Develop residency opportunities, if asset development permits
- Encourage and support two way contribution / development opportunities

3) Partnerships (internally)

- Managing and maintaining Council's strong volunteer base to enable the house to remain open over the summer months
- Develop better working relationships and joint planning with Parks, libraries and other in house business units
- Develop partnerships with NPM and others in the heritage sector (regionally, nationally and internationally)

4) Financial Goals

- Increased visitor numbers
- Develop related shop offering / merchandise / small retail experience.

5) Exhibition / Programmes

- A platform to develop local stories that contribute to the evolution of Isel Estate, that further connect Isel to Stoke, and Nelson to the homeland
- Create a Horticultural / Botanical / Sustainable identity

- Develop a strong connection to the grounds and river
- Further develop and enhance displays in the House

10.6 Melrose House

10.6.1 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.

10.6.2 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".

10.6.3 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. Any significant maintenance or refurbishment or external work requires the approval of Council officers.

10.6.4 Council funding is for external programmed maintenance.

10.6.5 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.

10.6.6 The house has a self-contained flat on the upper floor. This is currently rented by the café manager.

10.6.7 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.

10.6.8 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.

10.6.9 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.

10.6.10 Discussions with the Melrose Society and Council have been undertaken to allow the house to be better promoted as a visitor attraction, including adding on-site interpretation in the publicly accessible parts of the house and the inclusion of the house in a heritage houses promotional leaflet.

10.6.11 Strategic planning for Melrose House is underway, in conjunction with Melrose Society.

10.7 Summary Comparison of the Three Heritage Houses

	Isel	Melrose	Broadgreen
Council funding from rates	\$24,500 in 2018/19	\$28,730 in 2018/19	\$53,199 in 2018/19
Leases	Lease to Garden Café.	Lease to Percy Adams Melrose House Charitable Trust - has an upstairs flat and café area sublet. Lease for renewal January 2018. Council prepared to do a short-term extension of the current lease.	Council owns Broadgreen House Land under Broadgreen Centre lease for renewal 2019. Council prepared to extend lease.
Visitor numbers	2017/18 (10 Oct 16 – 30 Apr 17) 4483 house visitors		2017/18 3665 house visitors
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. Some other rooms open to the public during café opening times if no functions are being held	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	Museum loans collection. No storage problems.	Melrose Society owns collection, uses loans. Some issues with storage.	Council owned items and loans. Storage for textile collection at capacity.
Income streams	Gold Coin Donations from visitors; tours pay \$5 per person, which includes refreshment; potential hire of a community space. External fundraising.	To the Melrose Society: Café sub-lease, and hire of community spaces.	To the Broadgreen Society: lease of community space in Broadgreen Centre. External fundraising.
Improvements and services provided by Friends groups	Isel is Council owned and operated.	Extensive refurbishment of house interior including heating system, toilets, 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	None.	Colonel Noel Percy Adams Trust (the Melrose Society).	Broadgreen Society.
Council income from asset	Lease to Garden Café \$228 per annum House entrance fees to Council	Lease to Colonel Noel Percy Adams Trust currently paying \$200 per annum.	Peppercorn lease for land under Broadgreen Centre.

	Isel	Melrose	Broadgreen
Marketing	Nelson App, Facebook page, Council website, and advertising through Isel in Bloom, Teddy Bears Picnic, and the Heritage Week programme.	Nelson App, Facebook page, website and brochure developed by Melrose Society, Council website, and promotion via Nelson Venues and the Heritage Festival programme. Advertised in Heritage Houses and Cultural Heart promotional leaflets	Nelson App, AA listing and brochure developed by Broadgreen Society, Council website, and advertising through Rose Day and the Heritage Week programme.
Membership numbers	Managed by Council.	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	Advertisement, Isel in Bloom, social media, website updates. Talks to Probus/ community groups has attracted some volunteers.	Group responded to a recruitment advertisement.	Recruitment advertisement.

10.8 Future Work across the Houses

- 10.8.1 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.
- 10.8.2 Continue work on aligning lease periods and, where possible, make other lease conditions the same.
- 10.8.3 Review collection management policies and practices to address the focus of future collections, use in displays, and storage issues.
- 10.8.4 Through development of a Heritage Strategy, explore how Council heritage facilities fit into the context of the wider museum and heritage sector, and in evolving Nelson's heritage offering.

11 Other Heritage Activities

11.1 Description of Activity

- 11.1.1 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 that have happened nationwide, there is likely to be increased demand for these services.

11.1.2 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. The libraries contribute to this. It is also frequently done in partnership with community organisations or families who have an interest in heritage. Such research information is often provided by members of the Nelson Branch of New Zealand Genealogical Society, Nelson Historical Society and Heritage Nelson.

11.2 Historic Memorial Sites

- 11.2.1 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.
- 11.2.2 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 remains highly used.
- 11.2.3 Markers and maps have been developed to help people find some of the older sites.
- 11.2.4 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.
- 11.2.5 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.
- 11.2.6 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. This database is maintained by Nelson Provincial Museum.
- 11.2.7 Memorials have been added to Geographic Information Systems (GIS) maps. 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.

11.3 Commemoration Events

- 11.3.1 A number of important Commemoration dates have been celebrated/recognised with events both run by Council or by the community with support from Council. During the 2017-2019 period this has included the notable anniversaries of the

Passchendaele Battle 100 year Anniversary, The Sonia Davies Rail Protest, Women's Suffrage 125 Anniversary and the WW1 Armistice 100 year Anniversary. Looking forward to 2019/2020 years there are the Tuia Encounters 250 Anniversary events occurring nationally and the 150th Anniversary of NZ's first Rugby match occurring in Nelson. Council will look to support these and other key commemorative events.

11.4 Walks/ Interpretative Panels

- 11.4.1 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.
- 11.4.2 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.
- 11.4.3 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.
- 11.4.4 Council will continue to work with Nelson Tasman Tourism to promote heritage activities as part of the tourist experience.
- 11.4.5 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.

11.4 Heritage Week/Festival

The Nelson Heritage Festival has a focus on supporting other community members to run their own events with Council Coordinating the programme and promoting/marketing the Festival. The Festival 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.

11.5 The PROW Website

Council contributes to "The PROW", a website featuring historical and cultural stories from Nelson, Tasman and Marlborough. It serves as an accessible heritage archive for the community, and is maintained and updated by staff at the libraries.

11.6 Heritage Fund

11.6.1 Council has 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.

11.6.2 The three avenues are:

- Zero fees for resource consents for non-notified applications to conserve and restore a heritage item.
- 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.
- 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, which 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.

11.6.3 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."

11.6.4 Remissions of rates for heritage maintenance operate in three year 'cycles'; e.g., 2018-2021, 2021-2024, etc. A successful application for a remission made in any year within a cycle remains valid until the end of that cycle.

11.6.5 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.

11.7 Heritage Project Fund

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 \$100,000 in 2017/18, where it currently stands. There is an increasing number of applications relating to earthquake strengthening of heritage buildings.

11.8 Historic buildings owned by Council

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. The future uses of these buildings are presently being reviewed.

11.9 Fairfield House

Fairfield House is an historic house that serves as an active venue for corporate, private and public sectors, hosting events and other activities. Council provides a \$10,000 grant each year to assist the operations of Fairfield House.

11.10 Funding Strategy

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.

11.11 Future Work

- 11.11.1 Investigate and trial different ways of using technology to encourage access to Nelson's heritage by linking PROW stories, interpretative panels and maps.
- 11.11.2 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.
- 11.11.3 Build the profile of the Heritage Awards during Heritage Week with assistance from Heritage New Zealand, and increase community run events during the week.
- 11.11.4 Continue to create and install interpretative panels at historically important sites in Nelson.

12 Financial Summary

12.1 Total budget in the current year:

Activity – 2018/19	Operational Expenditure	Capital Expenditure	Income
Founders Heritage Park	\$427,243	\$78,331	(391,067)
Broadgreen Historic House	\$45,505	\$4,000	(\$5,000)
Isel House	\$22,505	\$23,000	(\$4,728)
Melrose House	\$28,745	\$20,000	(\$228)
Grant: Fairfield House	\$10,000		
Heritage Activities Program	\$62,633		
The PROW	\$11,880		
Heritage Incentives	\$170,000		
Nelson Provincial Museum	\$906,429		
TOTALS	\$1,684,940	\$125,331	(\$401,023)

12.2 Revenue and Financing Policy

- 12.2.1 Heritage Activity is primarily funded through rates. In regards to the Heritage Facilities, that is offset by income from entry fees, ticket sales, shop sales, venue hire, rental leases, and the bookfair.

12.3 Financial statements and projections

12.3.1 The table below shows the financial forecasts (2018-28) for Heritage Activity, outlining funding required over the next ten years to implement the work in this Activity Management Plan. It includes:

- Expenditure projections for the current year
- Forecasts by year by sub-activity, broken down into programmes/services/projects
- The additional funding as requested via the two Action Points in the Key Issues table (p.8)
- Does not include staff time and overheads

12.3.2 Key assumptions:

- All expenditure is stated in dollar values as at 1 July 2018, with no allowance made for inflation over this period.
- Council will continue to be involved in Heritage Activity.

Income/ Expenditure Type	Code Description	17/18	18/19 Yr 1 LTP	19/20 Yr 2 LTP	20/21 Yr 3 LTP	21/22 AMP	22/23 AMP	23/24 AMP	24/25 AMP	25/26 AMP	26/27 AMP	27/28 AMP
Managing Heritage												
Programmed Expenditure	Heritage Activities Programme	62,633	67,737	67,737	67,737	67,737	67,737	67,737	67,737	67,737	67,737	67,737
	Grant: Fairfield House	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
	The PROW website	11,880	12,366	29,563	12,363	12,363	29,563	12,363	12,363	12,363	12,363	12,363
Unprogrammed Expenditure	Strategic Plan Consultant	0	20,000	0	0	0	0	0	0	0	0	0
Museum												
Base Expenditure	Grant: NN Provincial Museum	834,138	834,138	834,138	834,138	834,138	834,138	834,138	834,138	834,138	834,138	834,138
	Grant: TBHT Top-Up	70,406	70,406	70,406	70,406	70,406	70,406	70,406	70,406	70,406	70,406	70,406
Financial	Interest	308,489	312,699	318,111	325,928	328,935	331,942	337,354	339,158	339,158	339,158	339,158
Isel House												
Income	Isel House Lease	(2,550)	(228)	(228)	(228)	(228)	(228)	(228)	(228)	(228)	(228)	(228)
	Entry Fees	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)	(2,500)
	Shop Sales, Net	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)
Base Expenditure	Telephones	600	900	900	900	900	900	900	900	900	900	900
	Electricity	3,000	1,644	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500
	Cleaning	4,500	1,800	1,800	1,800	1,800	1,800	1,800	1,800	1,800	1,800	1,800
	Security	3,300	800	800	800	800	800	800	800	800	800	800

	<i>Insurance</i>	4,230	4,861	4,408	4,408	4,408	4,408	4,408	4,408	4,408	4,408	4,408
	<i>Maintenance</i>											
	<i>Minor Assets</i>	8,765	5,000	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,000	3,000
	<i>Maintenance (unprogrammed)</i>											
	<i>38103011</i>		3,000									
	<i>Programmed Maintenance</i>											
	<i>38104011</i>		23,000									
	<i>Volunteers</i>		500									
	<i>Exhibitions and Activities</i>	2,500	3,000	800	0	800	0	800	0	800	0	800
	<i>House Promotions and Marketing</i>											
	<i>Changed from - Public Programmes</i>	0	1,000	350	350	350	350	350	350	350	350	350
<i>Capital Expenditure</i>	<i>Renewals: Structures</i>	3,581	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000
<i>Melrose House</i>												
<i>Income</i>	<i>Melrose House Rent</i>	(220)	(228)	(228)	(228)	(228)	(228)	(228)	(228)	(228)	(228)	(228)
<i>Base Expenditure</i>	<i>Prepare Business Plan</i>	0	0	4,000	0	0	0	0	0	0	0	0
	<i>Fire Safety BWoF</i>	3,512	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500
	<i>Programmed Exterior Cleaning</i>	0	4,500	0	0	4,500	0	0	4,500	0	0	4,500
	<i>Insurance</i>	5,824	6,014	6,012	6,012	6,012	6,012	6,012	6,012	6,012	6,012	6,012
	<i>Maintenance</i>	15,193	12,031	9,980	7,030	7,830	7,030	9,980	7,530	7,530	7,530	7,530

<i>Capital Expenditure</i>	<i>Renewals: Structures</i>	5,266	20,000	6,000	6,000	6,000	5,000	5,000	5,000	5,000	5,000	5,000
<i>Broadgreen House</i>												
<i>Income</i>	<i>Entry Fees</i>	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)
	<i>Shop Sales, Net</i>	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)
<i>Base Expenditure</i>	<i>Telephones</i>	1,704	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774
	<i>Electricity</i>	5,212	4,429	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500
	<i>Water</i>	1,240	1,000	1,290	1,290	1,290	1,290	1,290	1,290	1,290	1,290	1,290
	<i>House Cleaning</i>	4,649	4,839	4,838	4,838	4,838	4,838	4,838	4,838	4,838	4,838	4,838
	<i>Security</i>	3,306	3,400	3,400	3,400	3,400	3,400	3,400	3,400	3,400	3,400	3,400
	<i>Insurance</i>	3,783	4,348	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000
	<i>Maintenance From two budget lines</i>											
	38123010											
	38124011	30,524	19,709	9,707	30,914	9,707	9,707	9,707	9,707	9,707	9,707	9,707
	<i>Textile Preservation</i>	0	800	800	800	800	800	800	800	800	800	800
	<i>Exhibitions and Activities</i>	3,500	3,000	0	1,600	0	1,600	0	1,600	0	1,600	0
	<i>Volunteers</i>		800									
	<i>Condition Assessment</i>		6500									
	<i>House Promotions and Marketing</i>											
	<i>Changed from - Public Programmes</i>	0	1000	600	600	600	600	600	600	600	600	600

600	<i>Renewals: Structures</i>	5,266	1,600	10,000	10,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
<i>Founders Heritage Park</i>												
<i>Income</i>	<i>Bookfair Proceeds</i>	(134,000)	(132,651)	(132,625)	(132,625)	(132,625)	(132,625)	(132,625)	(132,625)	(132,625)	(132,625)	(132,625)
	<i>Cost of Sales: Bookfair Expenses</i>	30,000	29,714	29,708	29,708	29,708	29,708	29,708	29,708	29,708	29,708	29,708
	<i>Donations</i>	(512)	(531)	(531)	(531)	(531)	(531)	(531)	(531)	(531)	(531)	(531)
	<i>Rent: Shop Leases</i>	(100,000)	(106,121)	(106,100)	(106,100)	(106,100)	(106,100)	(106,100)	(106,100)	(106,100)	(106,100)	(106,100)
	<i>Venue Hire Fees</i>	(40,000)	(48,816)	(48,806)	(48,806)	(48,806)	(48,806)	(48,806)	(48,806)	(48,806)	(48,806)	(48,806)
	<i>Public Events Hire Fees</i>	(15,312)	(13,796)	(13,793)	(13,793)	(13,793)	(13,793)	(13,793)	(13,793)	(13,793)	(13,793)	(13,793)
	<i>Conferences Hire Fees</i>	(2,000)	(1,671)	(1,671)	(1,671)	(1,671)	(1,671)	(1,671)	(1,671)	(1,671)	(1,671)	(1,671)
	<i>Admission Charges</i>	(45,000)	(42,448)	(42,400)	(42,400)	(42,400)	(42,400)	(42,400)	(42,400)	(42,400)	(42,400)	(42,400)
	<i>Backpackers Special</i>	0	(1,061)	(1,061)	(1,061)	(1,061)	(1,061)	(1,061)	(1,061)	(1,061)	(1,061)	(1,061)
	<i>Staff Run Park Events</i>	(5,000)	(10,612)	(10,610)	(10,610)	(10,610)	(10,610)	(10,610)	(10,610)	(10,610)	(10,610)	(10,610)
	<i>Ticket Sales Sunday Jazz</i>	(3,500)	(2,500)	(3,200)	(3,200)	(3,200)	(3,200)	(3,200)	(3,200)	(3,200)	(3,200)	(3,200)
	<i>Kai Festival</i>	(2,650)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)
	<i>Deacquisition Income</i>	(50)	(212)	(212)	(212)	(212)	(212)	(212)	(212)	(212)	(212)	(212)
	<i>Shop Sales, Net</i>	(12,000)	(4,245)	(4,244)	(4,244)	(4,244)	(4,244)	(4,244)	(4,244)	(4,244)	(4,244)	(4,244)
	<i>Recoveries: Water</i>	(5,000)	(5464)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)	(2,653)
	<i>Recoveries: Sundry</i>	0	0	(531)	(531)	(531)	(531)	(531)	(531)	(531)	(531)	(531)

	<i>Recoveries: Electricity/Phone</i>	(42,960)	(48,000)	(42,440)	(42,440)	(42,440)	(42,440)	(42,440)	(42,440)	(42,440)	(42,440)	(42,440)
<i>Base Expenditure</i>	<i>Volunteer Expenses</i>	3,099	3,226	3,225	3,225	3,225	3,225	3,225	3,225	3,225	3,225	3,225
	<i>Telephones</i>	7,231	7,527	7,525	7,525	7,525	7,525	7,525	7,525	7,525	7,525	7,525
	<i>Electricity</i>	51,705	49,285	54,848	54,848	54,848	54,848	54,848	54,848	54,848	54,848	54,848
	<i>Water</i>	12,000	18,213	9,675	9,675	9,675	9,675	9,675	9,675	9,675	9,675	9,675
	<i>Rubbish Removal</i>	7,000	5,377	5,375	5,375	5,375	5,375	5,375	5,375	5,375	5,375	5,375
	<i>Building Cleaning</i>	21,693	22,582	22,575	22,575	22,575	22,575	22,575	22,575	22,575	22,575	22,575
	<i>Marketing & Promotion</i>	0	21,506	21,500	21,500	21,500	21,500	21,500	21,500	21,500	21,500	21,500
	<i>Security</i>	5,000	4,839	4,838	4,838	4,838	4,838	4,838	4,838	4,838	4,838	4,838
	<i>Insurance</i>	17,195	19,510	23,250	23,250	23,250	23,250	23,250	23,250	23,250	23,250	23,250
	<i>Bank Fees</i>	900	900	900	900	900	900	900	900	900	900	900
	<i>Commission</i>	3,306	3,441	3,440	3,440	3,440	3,440	3,440	3,440	3,440	3,440	3,440
	<i>Valuations / Surveys</i>	3,392	3,531	3,530	3,530	3,530	3,530	3,530	3,530	3,530	3,530	3,530
	<i>Maintenance</i>	139,953	174,201	183,966	183,966	183,966	183,966	183,966	183,966	183,966	183,966	183,966
<i>Unprogrammed Expenditure</i>	<i>Event and Hall Hire Expenses</i>	18,594	19,356	19,350	19,350	19,350	19,350	19,350	19,350	19,350	19,350	19,350
	<i>Sunday Jazz Expenses</i>	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500
<i>Programmed Expenditure</i>	<i>Development Fund Expenditure</i>	50,101	52,153	52,138	52,138	52,138	52,138	52,138	52,138	52,138	52,138	52,138
	<i>Sundry Operating Expenses</i>	10,924	11,371	11,368	11,368	11,368	11,368	11,368	11,368	11,368	11,368	11,368
	<i>Staff Run Park Events Expenses</i>	5,000	10,753	10,750	10,750	10,750	10,750	10,750	10,750	10,750	10,750	10,750
	<i>Displays</i>	12,396	12,904	12,900	12,900	12,900	12,900	12,900	12,900	12,900	12,900	12,900
	<i>Kai Festival Expenses</i>	3,500	2,122	2,122	2,122	2,122	2,122	2,122	2,122	2,122	2,122	2,122

<i>Capital Expenditures</i>	<i>Renewals: Structures</i>	10,532	10,813	10,810	10,810	10,810	10,810	10,810	10,810	10,810	10,810	10,810
	<i>Minor LOS Improvements</i>	63,191	62,402	0	0	0	0	0	0	0	0	0
	<i>LOS: Accessibility Improvement</i>	30,532	5,116	10,000	10,000	10,000	10,000	10,000	10,000	0	0	0
<i>Heritage Incentives</i>												
<i>Unprogrammed Expenditure</i>	<i>Resource Consent Discounts</i>	3,000	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>	67,000	67,000	86,000	86,000	86,000	86,000	86,000	86,000	86,000	86,000	86,000
	<i>Heritage Project Fund</i>	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000