

# Heritage Activity Management Plan

**2012-2022**

**Adopted by the Council  
on 20 September 2012**

**Ref: 1353971**



**Nelson City Council**  
te kaunihera o whakatū





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## EXECUTIVE SUMMARY

This Executive Summary provides an overview of the key issues arising in the Heritage Activity Management Plan 2012–2015. The plan covers those heritage facilities and activities that are owned or funded by the Council such as heritage houses, Founders Heritage Park, the Nelson Provincial Museum, historic cemeteries, monuments and memorials, the Heritage Project Fund, Heritage awards and Heritage Week.<sup>2</sup> This Activity Management Plan (AMP), together with the Whakatu Nelson Heritage Strategy 2006 (“Heritage Strategy”), provides the strategic and tactical direction for management of heritage assets and activities for the next three years. A review of the Heritage Strategy has been included as a medium priority (i.e. next 3 to 5 years) for future work and development.

Council recognises that cultural wellbeing is an important aspect of community wellbeing, and acknowledges the important contribution of Whakatu Nelson’s rich and diverse heritage to community wellbeing. Nelson’s heritage contributes to its distinctive identity, so we protect, interpret and celebrate our human heritage and historic places – Māori and more recent.

In the Heritage Strategy 2006, Council recognised that it has a clear role in the protection of heritage:

- as landowner with responsibility for managing several historic buildings and places.
- as a regulator and provider of incentives for the protection of significant heritage buildings, trees and sites in private ownership
- as a facilitator for growth and development in the city
- and as an advocate to boost public awareness of the benefits of heritage

Council works with national heritage management agencies, Tangata Whenua and a range of community organisations to protect, preserve and promote Nelson’s heritage.

Nelson has an ageing population and, while there is limited data on likely trends in heritage activities, there is expected to be an increasing demand for passive recreation and leisure opportunities. The Council’s heritage facilities and activities can play a role in meeting this demand. However, the services they provide need to be relevant, accessible and affordable and able to adapt to the changing needs and demands of the community. The Council needs to work with the community groups who run the houses to ensure this occurs.

Council owns a range of heritage facilities, including Founders Heritage Park and three heritage houses. It spends around \$151,000 across the three heritage houses but has limited input to decision making at the houses and, therefore, limited influence over levels of service. Governance and funding arrangements vary across the three houses and these would benefit from simplification. The Council is working to clarify the respective roles of staff and volunteers, as the lack of clarity has led to tension between Council staff and volunteers over the years. There are also opportunities to increase ‘value for money’ for ratepayers by: improving co-ordination and collaboration between the houses; between Founders Heritage Park and the houses; and between the Council and the houses. Addressing these issues is a priority for this plan.

The Council also contributes operating funding to the Nelson School of Music, the Theatre Royal and the Suter Art Gallery, all of which are listed heritage buildings. However, as these buildings are also a key part of Nelson’s arts infrastructure and are facing ongoing sustainability issues, they have been covered in a separate Arts Activity Management Plan.

<sup>2</sup>Heritage Trees are managed under the Parks and Reserves AMP

The Nelson Provincial Museum suffers from a shortage of quality museum storage and a lack of appropriate facilities for staff, volunteers, and researchers, with a number of associated risks. The current storage facility at Isel Park will reach capacity by 2014. The Council is currently exploring options for providing museum storage, one of which is extending the facilities at Isel Park. The total cost is estimated to be in the range of \$5M to \$7M, depending on which option is chosen, and has been provided for in this AMP. As the museum is a regional facility, the solution and costs, including capital and operating, should be agreed and shared between the two Councils.

Earthquake strengthening may be needed at Founders Heritage Park, Melrose House and Isel House over the life of this plan. Funding for seismic assessment and strengthening at both facilities has been provided for in this plan. Broadgreen House exceeds the current minimum trigger requirement of 33% of New Building Standards and is therefore is not considered to be an earthquake prone building.





# 1. INTRODUCTION

## 1.1 PURPOSE

The 2012 Heritage AMP updates and replaces the Heritage component of the Culture, Heritage and Arts Facilities Asset Management Plan 2007. The purpose of the plan is to guide the Council in the protection and management of its heritage assets and the provision of heritage activities to meet the needs of the Nelson community.

This AMP will be revised and updated before the next Long Term Plan in 2015.

The Purpose of the AMP is to provide the desired level of service in the most cost effective manner for present and future customers. Activity Management Plans expand the focus of traditional asset management planning on levels of services delivered by the asset to include the activities and services provided in and around the asset. Integrating the planning for the asset with its associated activities is a better approach for Community Services where often it is the activities that contribute directly to achieving community outcomes.

## 1.2 PLAN STRUCTURE

The Activity Management Plan aims to address:

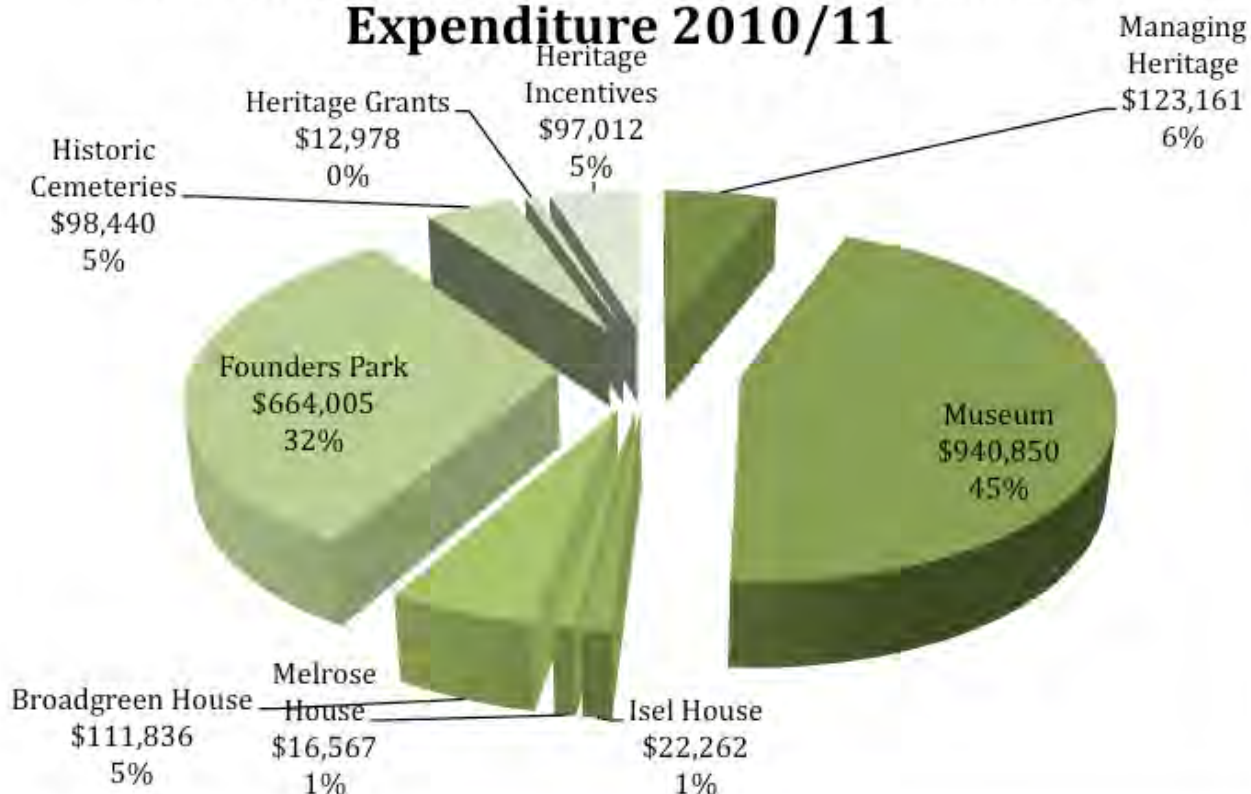
- Levels of service and performance delivery and how demand for these will change over the life of the plan
- The state of the assets and are they capable of meeting these demands now and in the future and what are the risks they may not?
- The best strategies for operating, maintaining, replacing and improving the assets
- Cost of the service over the long term and what is the best long-term funding strategy

## 1.3 THE HERITAGE ASSETS/ACTIVITY

The heritage services and assets associated with this activity are primarily focused on the “heritage assets” owned by the Council and to a lesser extent on heritage walks which have or are being developed and promoted by the Council in partnership with the Community. Assets and activities include:

- Three historic houses – Isel, Broadgreen and Melrose
- Nelson Provincial Museum (jointly owned by the Nelson City and Tasman District Councils)
- Founders Heritage Park
- Historic cemeteries (no longer inter remains) – Haven, Hallowell, Quakers Acre, Wakapuaka (historic part)
- Rocks Road historic stanchions and chain
- Monuments and memorials on Council land
- Cawthron (Cathedral) Steps
- Historic trails (including signage, markers, interpretative panels)
- Heritage Project Fund
- Heritage week/Heritage awards

## Heritage Operations and Maintenance Expenditure 2010/11



## Heritage Operations and Maintenance Expenditure as a Proportion of Total Council Expenditure 2010/11





## 1.4 THE STAKEHOLDERS

Council does not consult on its Activity Management Plans but does consult individually on heritage activities depending on the significance and location. Below is a list of key stakeholders, key user groups and area specific user groups that may be consulted with to enable the implementation of this Plan.

### 1.4.1 Key stakeholders

Key stakeholders identified in this plan are:

- The community of Nelson, including Tangata Whenua comprising local Iwi
- Trusts and other organisations who are involved in managing the heritage assets and activities, including:
  - Isel House Charitable Trust
  - Melrose Society
  - Broadgreen Society
  - Nelson Heritage Advisory Group
  - Nelson Historical Society
  - Historic Places Trust
- Other asset and activity users such as visitors and tourists

## 1.5 THE LEGISLATIVE CONTEXT

The work of the council is enabled by the Local Government Act 2002 (LGA). The Local Government Act (2002) places a legal obligation on Council to manage its assets to provide a specified standard of service in a cost effective manner. Council has committed to undertake this obligation in accordance with its Asset/Activity Management Policy using Asset and Activity Management Plans.

Councils have responsibilities under various pieces of legislation for heritage management and protection, notably the Resource Management Act, Local Government Act, Building Act and Historic Places Act.

The **Regional Policy Statement 1997 (RPS)** guides the council in heritage matters and there are provisions in the Nelson Resource Management Plan 2004, which the Council has to follow when considering the use and development of listed heritage property. 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.

### **1.5.1 Resource Management Act 1991 (RMA)**

Under the RMA, local authorities have the statutory responsibility to recognise and provide for the protection of historic heritage from inappropriate subdivision, use and development within the context of sustainable management. Responsibilities for managing adverse effects on heritage arise as part of policy and plan preparation, and the resource consent processes.

Local authorities are also heritage protection authorities in relation to any heritage orders they administer. Local authorities have a duty to gather information and monitor the state of the environment in the region or district (section 35 of the RMA).

As owners of heritage places (e.g. buildings, parks, reserves, infrastructure, and archaeological sites), local authorities must meet relevant statutory requirements and comply with plan rules for land they own and administer.

Local authorities have a responsibility under the RMA to take into account the principles of the Treaty of Waitangi.

### **1.5.2 Local Government Act 2002 (LGA)**

The LGA includes requirements for consultation to ensure plans reflect community-based objectives. Strategic direction for growth of new development, or even negative growth as places contract, should always address the effects on heritage places. As areas used by the community change, new uses may need to be found for heritage buildings and places. Under the LGA, a local authority must provide opportunities for Māori to contribute to the decision-making processes of the local authority, consider ways in which it may foster the development of Māori capacity to contribute to the decision making processes of the local authority, and provide relevant information to Māori for the purposes of enabling Māori to contribute to decision making (see s.81 of the LGA).

### **1.5.3 Building Act 2004**

Council must comply with the provisions of the Act as owner and a key component affecting the heritage houses is the need to comply with the Earthquake-prone, Dangerous Buildings Policy adopted in 2006.

### **1.5.4 Historic Places Act 1993 (HPA)**

Historic Heritage is protected under the Historic Places Act and by the New Zealand Historic Places Trust (NZHPT) through:

- Voluntary conservation and heritage covenants – negotiated between NZHPT and landowners
- Registration – an identification and recognition tool which assists the protection of these places under the RMA
- Archeological Authorities – the HPA makes it unlawful for any person to destroy, damage or modify the whole or any part of an archaeological site without an archaeological authority from the NZHPT.



## 1.6 THE STRATEGIC CONTEXT

### 1.6.1 Links to Community Outcomes

The Heritage activity makes a contribution to the following Community Outcomes from the Nelson Long Term Plan 2012-22. The Community Outcomes of most relevance to this AMP are:

- **People-friendly places** – We build healthy, accessible and attractive places and live in a sustainable region ..... We protect, enhance and interpret Nelson’s human heritage and historic sites.
- **A Strong Economy** – We all benefit from a sustainable, innovative and diversified economy. Economic activity is sensitive to the environment, heritage and people of Nelson.
- **A fun, creative culture** – We are proud of our creative local culture and regional identity. We understand that our heritage contributes to our distinctive identity, so we protect, interpret and celebrate our human heritage and historic places – Māori and more recent.

### 1.6.2 Relationship to the Nelson Long Term Plan

This Activity Management Plan (AMP) both shapes and is shaped by the Long Term Plan (Council’s 10 year plan as required under the Local Government Act). Every three years, the current AMPs are one of the main documents on which the ten year spending programme for Council is based. The strategic direction set in each Long Term Plan provides the context for each subsequent AMP when they are reviewed.

### 1.6.3 Links to Council Priorities

In considering how it would achieve the Community Outcomes, Council has agreed to a number of priorities in the Nelson Long Term Plan 2012-2022. Two of these relate to Nelson’s identity and heritage and are set out below:

<b>A leading lifestyle</b>	Through providing excellent facilities for, and opportunities to participate in, heritage activities while ensuring a good lifestyle doesn’t cost a lot of money
<b>Creative</b>	Nelson has a reputation as an arts and cultural centre and Council’s investment helps nurture and grow these activities

## 1.6.4 Relationship to Other Council Policies

### 1.6.4.1 Whakatu Nelson Heritage Strategy 2006

The Whakatu Nelson Heritage Strategy 2006 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."*

The Strategy goes on to say that:

*"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."*

### 1.6.4.2 Social Wellbeing Policy

The Heritage activity makes 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".*

## 1.6.5 Nga Taonga Iho Ki Whakatu Management Plan

Iwi Management Plans (IMP) 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 five 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 Regional Policy Statement, Regional Plan or District Plan. The Nelson IMP documents iwi worldview and aspirations for the management of resources, and helps Councillors and staff 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 acting in partnership with local iwi.



## 2. LEVELS OF SERVICE

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

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

	Level of Service	Measures	Targets
<b>Tangata Whenua Heritage</b>	Support local iwi to protect, conserve and maintain their cultural heritage	Level of consultation on policy and planning decisions relating to Tangata Whenua cultural heritage	Consult with iwi on Council policy and planning decisions relating to Tangata Whenua cultural heritage
<b>Three Heritage Houses (Isel, Melrose and Broadgreen)</b>	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 by Isel and Broadgreen each year	Isel and Broadgreen will provide at least 2 exhibitions and 1 event relating to Nelson's history each year
		Number of visitors	Maintain or increase visitor numbers each year
		Customer satisfaction (measured through user survey in 2014/15)	At least 70% of customers are satisfied or very satisfied with the heritage houses
	Council's heritage houses are protected and preserved.	Heritage assets are maintained to an adequate level.	Heritage assets are maintained to a level 3 (average) condition.
	Council's heritage houses will provide value for money to ratepayers	Maintenance cost per visitor	Maintenance cost per visitor for Melrose and Isel does not increase over the period 2012/13 to 2014/15 and decreases for Broadgreen

	Level of Service	Measures	Targets
<b>Founders Heritage Park</b>	Founders Heritage Park is the first-choice regional location for an increasing number of events, private functions and conferences	Number of events held at the park	Attract at least 8 events to park each year
		Level of income from conferences or conference related business to use facilities at the Park	Income from conferences has increased for each year from 2012/13 to 2014/15
	Retain and attract tenants to Founders Heritage Park that contribute to the life of the Park	Level of tenanted spaces at the Park	2012/13: 85% of available spaces are tenanted. 2013/14: 90% of available spaces are tenanted. 2014/15: 95% of available spaces are tenanted
	The collection items at Founders Heritage Park are used to tell early Nelson's stories to visitors and assist in attracting paying visitors to the Park during the summer season	Quality of interpretative displays continue to be updated to tell interesting stories about Nelson's heritage	Achieve at least 2 new or improved displays each year
		Numbers of local and paying visitors	Numbers of local and paying visitors increases each year from 2012/13 to 2014/15
	Heritage facilities and activities through Founders Heritage Park will be easily accessible for people, thereby enabling all to access and enjoy activities at the Park	Number of priority 1 accessibility barriers identified in the accessibility audit addressed	Priority 1 accessibility barriers identified in the accessibility audit have been addressed by 30 June 2015.
<b>Nelson Provincial Museum Pupuri Taonga o Te Tai Ao<sup>2</sup></b>	Celebrate the special nature of the history of Whakatu Nelson, both Māori and non-Māori	Annual customer satisfaction survey	80% of customers are satisfied with the major exhibitions
	Protect and preserve the regions treasures/taonga	Manage the region's collections according to acceptable standards	Meet acceptable museum standards
	The museum will be financially sustainable	Strength of balance sheet	The TBHT's balance sheet strengthens each year from 2012/13 to 2014/15
<b>Historic Cemeteries</b>	Historic cemeteries are maintained to a park like standard and meet the needs of visitors	Condition of the cemetery	All historic cemeteries are kept in a tidy condition.
		Public know where entrances are and where interpretive information is located	There are no complaints from the public about signage and markers at historic cemeteries

<sup>2</sup> Levels of Service aligned with SOI deliverables



### 3. FUTURE WORK AND DEVELOPMENT PROJECTS

Summarised below are the identified future work and development needs in order to meet levels of service and development standards for the parks and reserves network. High priority tasks will be undertaken by 2014/15 to inform the next review of this Activity Management Plan. Medium priority tasks are signalled for the next 3-5 years.

Activity	Project or Development Need	Priority
<b>Heritage Houses</b>	Review administration and funding arrangements across the houses with a view to simplifying; giving Council greater influence over levels of service; and improving co-ordination and collaboration.	High
	Work with the Broadgreen Society to determine the feasibility of reducing hours or closing over the winter months.	High
	Work with the houses on succession planning for staff, volunteers, Society.	Medium
	Investigate pros and cons of continued Council ownership of Melrose.	Medium to Low
<b>Founders Heritage Park</b>	Improve the accessibility of the facilities.	High
	Further work to rationalise the Founders collection.	Medium
	Foster and develop key strategic relationships to attract and grow new audiences.	Medium
	Improve co-ordination of events and activities across heritage facilities, particularly heritage events and activities.	High
<b>Nelson Regional Museum</b>	Address museum quality storage issues through the implementation of Council's preferred option for increasing storage space.	Medium
	NCC to work with the TDC and TBHT to resolve status and management of the loan to the TBHT.	High
<b>Other Heritage Activities</b>	Develop a mechanism for improving the promotion and co-ordination of the Council's historic attractions e.g. complementary exhibitions and events and/or calendar.	High
<b>Whakatu Nelson Heritage Strategy 2006</b>	Review the Whakatu Nelson Heritage Strategy	Medium

Of the work listed above, the Council's Heritage and Arts Advisor will be responsible for the following projects:

- Work relating to the heritage houses
- Work relating to improving the co-ordination of events and activities across the heritage facilities, particularly heritage events and activities







## 4. TRENDS AFFECTING DEMAND FOR HERITAGE ACTIVITIES

### 4.1 DEMOGRAPHICS

Nelson's population is expected to grow by around 2,500 over the next 10 years<sup>3</sup>.

The proportion of older adults in Nelson is already higher (estimated 16% in 2011) than the national average and this trend is expected to continue. In ten years time around one fifth of the Nelson population is expected to be 65 years or older. That will rise to a quarter around 2026<sup>4</sup>. Currently 36% of people aged 75 and over have a moderate disability and 18% a severe disability, thus accessibility for the less mobile will be a key issue<sup>5</sup>.

The ageing population is expected to cause 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 needs (e.g. are accessible) and interests.

### 4.2 NATIONAL TRENDS IN ATTITUDES TO HERITAGE

There is limited local information on trends relating to heritage. However, in 2010 the New Zealand Historic Places Trust (NZHPT) surveyed 1000 New Zealanders, 15 years of age or more on their attitudes to heritage. The response rate was 32%. The key findings were that:

- Approximately one third were 'very interested' in protecting and preserving places and sites that are important to New Zealanders or their heritage.
- The 'very interested' segment were more likely to comprise females and mid to older aged people. As a result they are more likely to comprise older couples with no children or none living at home and older retirees.
- New Zealanders believe that places and sites that are unique (only found in) New Zealand should be protected ahead of all other places and sites.
- Although New Zealanders are interested in protecting and preserving places and sites that are important to New Zealanders and their heritage, they are more inclined to protect the country's natural heritage.
- The most important benefit of protecting and preserving places and sites that are important to New Zealanders and their heritage is that it is 'for the benefit of future generations'.
- Many New Zealanders visit places and sites that are important to New Zealanders and their heritage in any given 12 month period. Together with the 'very interested' segment Māori were more active than non-Māori with respect to places and sites that are important to New Zealanders and their heritage.

While this survey provides a snapshot only, the NZHPT has advised that it intends to repeat the survey every three years, which will enable the monitoring of trends.

<sup>3</sup> Population projections from Statistics NZ completed in 2010.

<sup>4</sup> Nelson City standard population forecasts based on Statistics New Zealand data

<sup>5</sup> NZ Institute for Research on Ageing data

## 5. SUSTAINABILITY

### 5.1 OVERVIEW OF SUSTAINABILITY

The Local Government Act 2002 requires local authorities to take a sustainable development approach while conducting its business. In doing this the Council is required to take into account:

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

Council adopted a Sustainability Policy in 2008 setting out Council's commitment to sustainability through the services it provides and in the way it operates as an organisation. Sustainability is described in the policy as being:

*1.1 "...a process of ensuring the wise use and management of all resources within a framework in which environmental, social, cultural and economic well being are integrated and balanced. It means meeting the needs of today without adversely impacting on the needs of future generations."*

### 5.2 FRAMEWORK

The Council is in the process of developing a more comprehensive sustainability strategy, Framing our Future, to provide context and coherence to policy, planning, investment decisions and activities for both the Council and community (groups, businesses and individuals). An overarching aim of the Strategy will be to increase the capacity of the Council and community to actively respond and adapt to change with minimum cost to communities, to community systems (including infrastructure) and ecosystems. The Strategy, which has a 50 year horizon, is being developed in consultation with the community and is expected to be finalised in 2012/13.

The Council has adopted an internationally renowned framework known as 'The Natural Step' to guide the development of the Framing our Future (Sustainability) Strategy. The Natural Step combines a rigorous, science-based understanding of sustainability with a tested planning approach. The Natural Step incorporates four key principles for sustainable development (see table 1 below) and uses a process of backcasting to ask what steps are needed to take us as efficiently and effectively as possible towards the shared vision.

**Table 1: Four Sustainability Principles**

1. Reduce and eventually eliminate reliance on substances extracted from the earth's crust, including mined metals, minerals and fossil fuels (WHAT WE TAKE)	2. Reduce and eliminate our contribution to the systematic accumulation of chemicals and substances that do not breakdown in nature (WHAT WE MAKE)
3. Reduce and eliminate our contribution to the ongoing physical destruction of our natural environments (WHAT WE DESTROY)	4. Reduce and eliminate our contribution to conditions that systematically undermine people's ability to meet their basic needs, taking into account economic, social and cultural wellbeing of people and communities (HOW WE SHARE)



These four principles are consistent with the idea of 'strong sustainability' and will be important in guiding thinking and action for the future across Heritage assets and activities. Central to moving towards the sustainability principles is the idea of building resilient and flexible systems which can adapt over time.

The 2012 Heritage Activity Management Plan takes an initial step towards incorporating The Natural Step framework into its activity management planning by identifying:

- the key challenges for sustainable management of the asset and associated activities; and
- the contribution of the activities to meeting the four sustainability principles in Table 1 above.

Historic heritage should be managed in a sustainable manner to meet the needs of present and future generations and to avoid adverse effects on the environment. Sustainable management can include promoting adaptive uses of heritage places.

Natural hazards, particularly earthquakes, pose a potential risk to the ongoing protection of Nelson's heritage assets, both Council and privately owned. Earthquake strengthening should meet best practice principles for the sustainable management of historic heritage. As part of its Sustainable Management of Historic Heritage Guidance Series, the NZHPT provides guidance on earthquake strengthening of heritage buildings<sup>6</sup>. The cost of improving the structural performance of heritage buildings will be a significant ongoing challenge for the Council and private owners.

Currently heritage assets and activities in Nelson have their biggest potential impact on sustainability principle four (how we share), by contributing to the economic, cultural and social wellbeing of residents. Many of the levels of service in this Activity Management Plan focus on addressing these well beings. The heritage assets and activities covered in the plan have minimal impact (negative or positive) on environmental sustainability (principles 1 to 3). The heritage parks are maintained under the Parks and Reserves Activity Management Plan.

### 5.2.1 Future work

- There may be opportunities to reduce energy/electricity use in some areas and these opportunities should be implemented where practicable, although the impact on total Council energy/electricity use will be small.
- Use of resources, recycling of materials – work with staff and volunteers on a plan to minimise waste by reducing, reusing and recycling, including running zero waste events where practicable.
- Incorporate sustainable building design where renovations, refitting and new building work are undertaken. This should include consultation with the Council's Ecobuilding Design Adviser.
- Ongoing work to ensure that heritage facilities and activities remain relevant to the community and meet their needs.

<sup>6</sup> Sustainability New Zealand Historic Places Trust Pouhere Taonga, Sustainable Management of Historic Heritage Guidance Series Information Sheet: Earthquake Strengthening – Improving the Structural Performance of Heritage Buildings (draft for consultation)

## 6. TANGATA WHENUA HERITAGE

Heritage (including sites and other taonga) is integral to Tangata Whenua cultural identity. The 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.

- Tangata Whenua cultural heritage sites (which includes archeological sites) on Council Parks and Reserves Land are managed under the Parks and Reserves Activity Management Plan e.g. the Rushpool Argillite mines.
- Most Tangata Whenua cultural heritage sites (which includes archeological sites) are managed under the NRMP (refer Appendix 3). As noted above, the Iwi Inventory Project is likely to lead to some changes to the sites listed within the NRMP.

Level of service	Measure	Target
<b>Support local iwi to protect, conserve and maintain their cultural heritage</b>	Level of consultation on policy and planning decisions relating to Tangata Whenua cultural heritage	Consult with local iwi on Council policy and planning decisions relating to Tangata Whenua cultural heritage.





## 7. HERITAGE HOUSES

### 7.1 OVERVIEW

Isel, Melrose and Broadgreen are listed historic properties owned by Council. The three houses are leased to not for profit “friends” groups that manage the day to day operations of the houses and have contributed significantly to the conservation and enhancement of the properties. The Council is working towards aligning all of the leases to expire in 2018.

#### 7.1.1 Common features

- All the houses are owned by Council and came into ownership through purchase by the council or gifting to the Council in the 1960s and 1970s.
- All buildings are listed on the register of the NZ Historic Places Trust (NZHPT) and in the Nelson Resource Management Plan.
- All are in Reserve settings so the Council has a responsibility for the surrounds to the properties<sup>7</sup>. Context is important to the heritage value of each house.
- All are governed and resourced in some way by both the Council and “friends” groups.
- Friends groups use their charitable status to access external funding used to restore, run and open the houses.
- Without the high levels of volunteer support from the community through “friends” groups these properties would not be in the condition they are today.

#### 7.1.2 Points of difference

- Broadgreen and Isel operate as places offering a heritage experience in a museum like setting with relevant chattels and contents. The contents of Melrose were sold at the time the Council purchased the property. It now operates as a venue for hire in an historic building and houses a commercial cafe under a sublease arrangement.
- Isel has a residential area which is currently rented to members of the Isel House Charitable Trust who also manage restoration of the house. Melrose contains a flat upstairs occupied by a manager employed by the Melrose Society. Broadgreen is unoccupied after hours.
- At Broadgreen the Council employs two curatorial staff on a part-time basis but employs no staff at the other two houses. Volunteer guides operate at Broadgreen and Isel.
- Broadgreen opens all year, Isel part year only (October to end April, other times weekends or by appointment) and Melrose is available year round.
- Melrose is in central Nelson and the other properties are in Stoke.
- The leases of the properties to the “friends” groups are not homogeneous.

<sup>7</sup> Reserves are managed under the Parks and Reserves Activity Management Plan

**Table 2: Comparison of the three heritage houses**

	Isel	Melrose	Broadgreen
Condition	Level 3 (average)	Level 3 (average)	Level 3 (average)
Budget 2010/11	\$25,016	\$22, 004	\$150,283
Visitor numbers	2823 visitors 2010/11 (open only part year October – May inclusive)	146 bookings for 12 months to March 2010. Plus café visitors	Year to June 2011, 3,546 visitors to the house and centre (currently open all year round).
Cost/visitor	\$8.86	N/A (as hired out as venue)	\$42.40
Fundraising	\$829,000 from 2002-9	\$350,000 from 2009-2011	Total not known but \$100,000 plus raised by the Society for construction of Broadgreen Centre in 2000.
Governance structure	Isel House Charitable Trust	Colonel Noel Percy Adams Trust (the Melrose Society)	Broadgreen Society
Marketing	By Isel House Charitable Trust, Facebook page and brochures, Council website	By Melrose Society, has developed own website and brochure, Council website	By Broadgreen Society – AA listing and brochure, school holiday programme, Council website joint rack cards promotion, and a range of other promotional activities run by the Society
Membership numbers	4 expert trustees, 8 committee members, 110 subscribing members and 14 house volunteers	Committee of 8, approx. 30 “friends”	Committee (note: NCC has appointed a voting committee member to the Broadgreen Society). 6 life members, 9 honorary members and 5 associate members, 35 volunteer guides and 1 volunteer assistant
Activities to attract/retain volunteers	Recent advertisement	Recent group responded to an advertisement	Recent recruitment advertisement and ongoing

## 7.2 ISEL

### 7.2.1 Description of the Asset

Isel house was built in the late 19th century by Thomas Marsden and remained a private residence set in farmland for some time. The house is set in Isel Park, Stoke, which is 7.16 ha of historic garden park maintained by the Council.<sup>8</sup> Its construction is predominantly heavy masonry, namely basalt rubble and brick although a later extension is timber clad. The house opened to the public in 2003.

The house has a Category II rating from NZHPT and is A listed in the NRMP for the building, interior and surrounds. Isel Park is listed as A in the Plan as a place. Group A buildings and places are considered to be of major significance in the district and their protection is considered essential (except in exceptional circumstances). Category I rating indicates a place of special or outstanding historical or cultural heritage significance of value, category II denotes a place of historical or cultural heritage significance or value.

<sup>8</sup> Isel Park is covered under the Parks and Reserves Activity Management Plan.

The building was leased to the Trust by the Council on 29 April 2002 for a period of 10 years from 1 May 2002 and has first option to a new lease on expiry on 30 April 2012. The rental is a peppercorn and the lease provides a detailed schedule of foreseen works to be carried out by both the Council and the Trust over the lease term. The majority of the work is to be undertaken by the Trust and includes exterior and interior work. This has occurred. There is also a detailed condition assessment at commencement attached to the lease.

The lessee is responsible for maintenance and repair of the building, and insurance of the lessee's and lessor's chattels and fittings, as well as maintaining public liability insurance of \$1M. Permitted use is "the operation of Public Exhibition Premises and Historical Display Centre". The Trust collects a reduced market rent for the residential area within the house and the tenants in return put in time to run and restore the house.

### 7.2.1.1 Isel House Charitable Trust

As of 2011 the Trust has 4 trustees, eight committee members, 110 subscribing members and 14 house volunteers. The Trust is guided by expert trustees and currently manages the restoration of the house to ICOMOS NZ Charter standards. The Trust has commissioned a recent conservation plan which will be used to guide future restoration. The plan has been developed by a Trustee.

In 2011 Isel house was a finalist in the NZ Museums Awards in "Project Achievement award, Exhibition Excellence, Small Museum" category. Over the period of the lease a collection has been purchased and loaned and the collection has recently been catalogued and digitised.

There is a small door charge for entry and the Trust operates on a limited budget. The Trust also works alongside the Council to run events in the gardens throughout the year to raise awareness of the house and the work of the Trust. These include Isel in Bloom in October and the Teddy Bears picnic in January.

The Trust has been successful in obtaining external funding for much of the restoration work but believes it will get harder to access funding now that much of the major work has been undertaken. Between 2002 and 2009 the Trust says that it has undertaken improvements and restoration work to the value of \$829,000.

The condition of the house is rated as level 3. Seismic assessment and strengthening work, if required, is programmed for year 1 of the AMP.

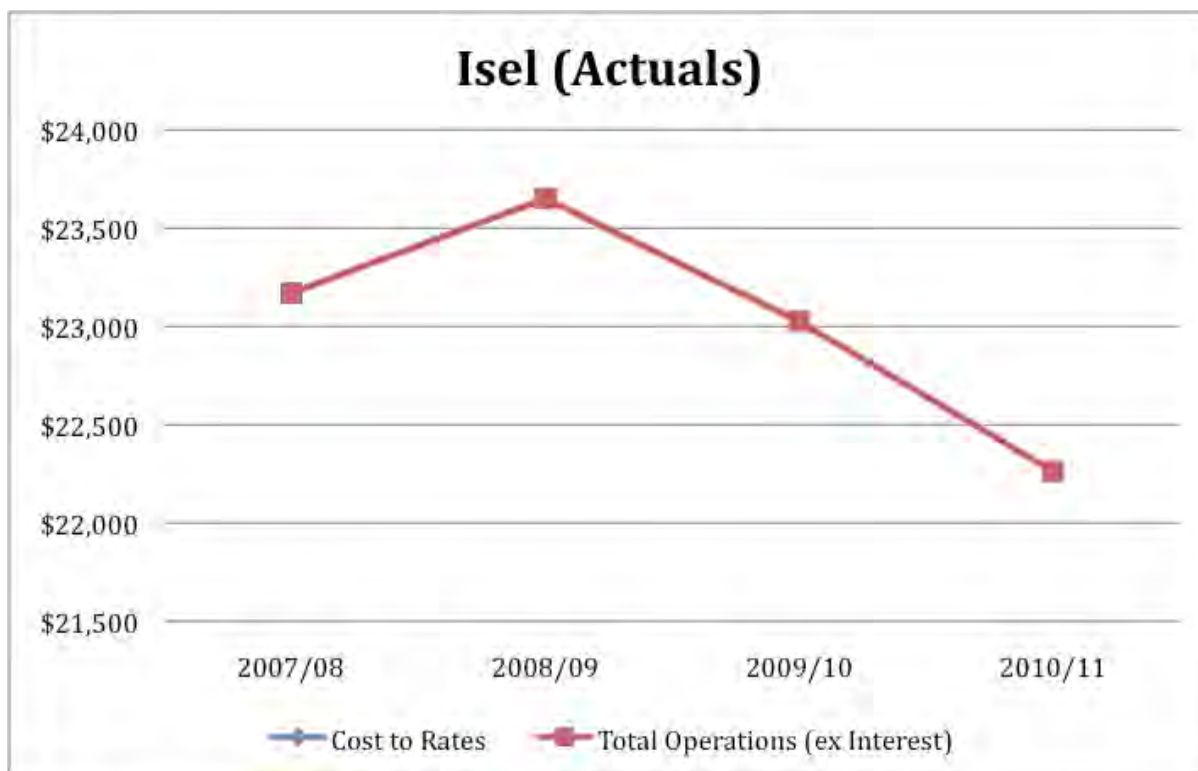
## 7.2.2 Demand/Visitor numbers

The Trust has kept good records of visitor numbers monthly throughout the time it has opened the house and recently surveyed a sample based on Museums Aotearoa Visitor Survey questionnaire. Numbers are around 2,500 per annum, although the house is only open for part of the year. Overall, visitor numbers have been trending down over the last three years, although the percentage of non-local New Zealanders has risen. Spikes in visitor numbers have occurred around the events in the Park, and also previously around the time of the Wearable Arts shows when these were based in Nelson.

## 7.2.3 Community grant assistance

Community grant funding was given by the Council of \$4,000 over 2 years to pay for a part-time staff member to carry out work on the collection inventory. Another grant of \$1500 was approved in the 2011/12 round of funding.





Note: the cost to rates and total operations costs follow the same line as there is no other source of revenue. Any income generated by the house is kept by the Trust.

## 7.3 MELROSE HOUSE

### 7.3.1 Description of Asset

Melrose House was built as a residence in 1876. The building is a grand timber clad house. It passed down the family before being gifted and used by the Women's Division of Federated Farmers as a holiday/rest home. The gift of the property reverted to the council in 1973. At this time the contents of the house were sold by the council. The building is in a park like setting now established as an Historic Reserve under the Reserves Act (the lease is granted pursuant to the Reserves Act 1977). The gardens are maintained by the council.

The house has a category I listing from NZHPT, with an A listing in the NRMP. The building interior and surrounds are listed.

The main areas of the house are rated level 3 (average). Some service areas are noted as tired. Seismic assessment and work is programmed for year 2 of the AMP.

#### 7.3.1.1 Lease/occupation

The lease of the land and buildings dated 26 March 2010 to the Society for ten years from 12 January 2008 to 11 January 2018 at a rental of \$200 p.a. reviewed on 12 January 2013. Permitted use is "community and public purposes including recreational and cultural activities". The lessee is responsible for keeping and maintaining the interior of the house in good condition, for monthly owner and IQP inspections related to the compliance schedule and has to hold \$2m public liability insurance cover. The lessor (council) is not obliged to insure the building but does so.

In 2010 the Society sought consent from the council (as required under the lease) to sublet part of the ground floor for use as a commercial cafe. Permitted use was extended to “community and public purposes including recreational and cultural activities; and also a cafe”. This necessitated alterations and these were to be carried out by a heritage professional. The cafe has been open since the beginning of 2011 and the rental is paid to the Society. The Society also holds fundraising events.

The house has a self-contained flat on the upper floor. Until recently, this was occupied by the manager for the house, who held the role with the Society from May 2009 to August 2012, after making a proposal to the Society for services to ensure that work on the house would be done in return for subsidised accommodation. It is understood that a committee has recently been appointed and the Manager’s position has not been filled.

The improvements facilitated by the previous Manager are reflected in the condition report. In contrast to Isel, the upgrade has been one of structural and cosmetic improvement and by its nature has not followed strict heritage guidelines. However NZHPT has been involved as well as Council staff, and the improvements are in keeping with the heritage value of the house.

Chattels have been acquired through loans and donations that have helped furnish the building. In addition the Manager has secured external funding (grants and donations) to the sum of \$175,000 (as at March 2011) or contract deals for projects including the website development. With a cafe on site and increased bookings the building is being used far more than it has been in recent years.

### 7.3.1.2 Society

The Colonel Noel Percy Adams Trust (the Melrose Society) formed in 1974 and has worked to preserve and refurbish the house. The current Society is directed by a committee of eight. There are currently about 30 “friends”.

The mission statement of the Society is “To preserve, enhance and promote historically significant Melrose House by making it accessible to the general public for their use and enjoyment in ways that reflect and uphold those aims”.

Details of the house can be found on the website developed by the Society [www.melrose.co.nz](http://www.melrose.co.nz).

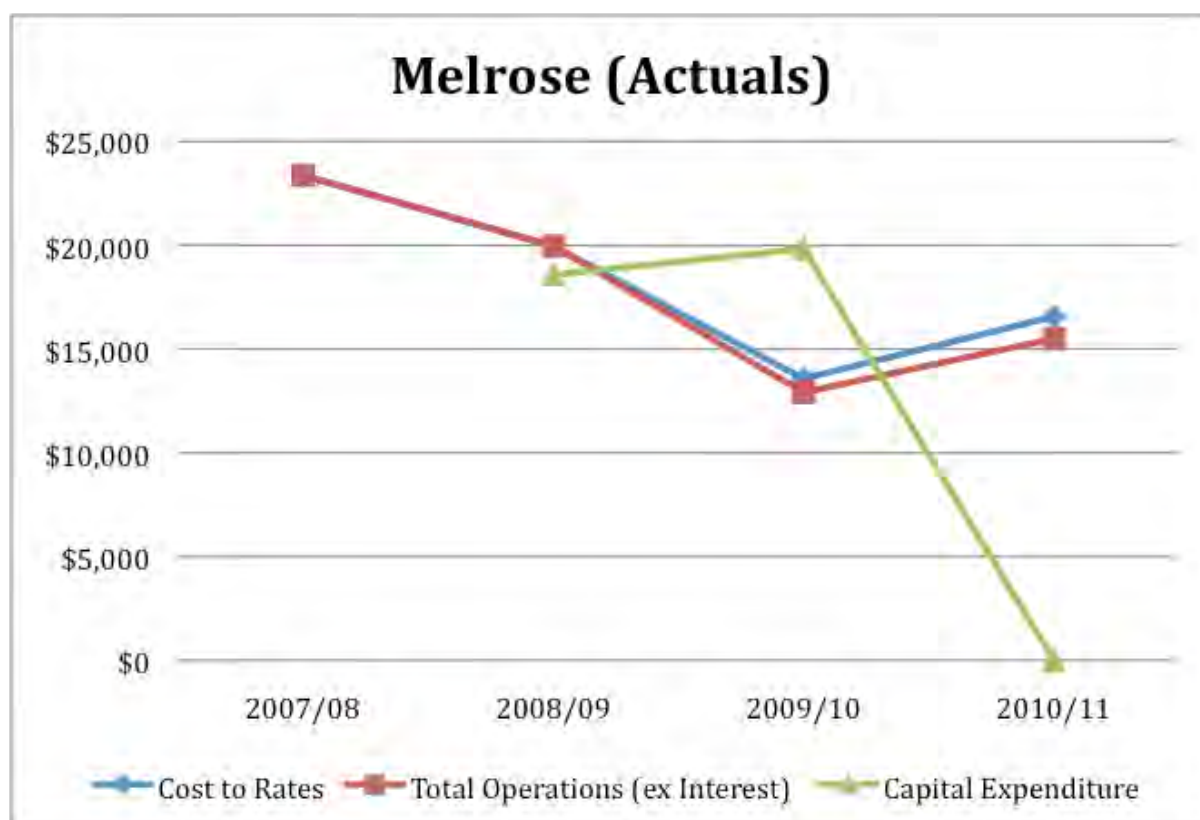
## 7.3.2 Demand/Visitor numbers

The manager has recorded 146 house hires in the 12 month period to March 2010. In the year to March 2011 there were 75 hire agreements including one to a language school. The manager has started recording numbers of visitors coming to the house via organised bookings and through the café. In the year to December 2010, total bookings brought 2,500 people to the house (not including casual visitors). In the year to December 2011, total bookings and café patrons brought 26,000 people to the house.<sup>9</sup>

<sup>9</sup> Numbers provided by Manager, Melrose House



## 7.3.3 Financial Performance



Note : Any income generated by the house is kept by the Society



## 7.4 BROADGREEN HOUSE

### 7.4.1 Description of the Asset

Broadgreen House was built as a family home in 1855. It is of cob construction and contains a collection of mainly Victorian items in keeping with the heritage of the property. It is set out as a home and provides an insight into family life at that time.

The house has a category I listing from NZHPT, with an A listing in the NRMP. The building interior and surrounds are listed. The gardens are A rated in the NZHPT Register.

The Council purchased the property in 1965 and is fully responsible for the fabric of the building but is assisted by the Broadgreen Society in running the facility and maintaining the collection.

The Council employs a senior curator for 4 days a week for 6 months of the year and 3 days a week in the colder months, as well as a part time curator for 12 hours a week.

Adjacent to the house is a building known as the Broadgreen Centre, which is wholly owned by the Broadgreen Society. This was built in 2000 by the Broadgreen Society with the assistance of external funds it raised. The Centre functions as the entrance route to the House for the 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 workspace for volunteers and curatorial staff employed by the Council. Until the Centre was built, the staff were based in Broadgreen House. The collection numbers some 3000 items, most of them costumes and textiles. Storage space for the collection in the Broadgreen Centre and House is limited.

The condition of the house is rated level 3 (average).

#### 7.4.1.1 Lease/occupation

The Broadgreen Society leases the land on which the Centre is situated. This 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 the Council for Council staff employed at Broadgreen House to use the office space and facilities at the Centre. The Council is responsible for maintaining the exterior of the building, paying the contents insurance (for the Centre and House) and utilities such as power, telephone, water. The Society maintains the interior and cleans the outside walls and gutters.

Clause E in the Background section of this 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."

A general reading of this would suggest that the Centre would be gifted to the Council prior to or at the end of the lease, i.e. 2019. In 2009 the Society made a request for a further renewal beyond 2019 but the Council declined this request. Further discussions between the Council and the Society will be needed to resolve this issue.

### 7.4.1.2 The Society

Originally Broadgreen was directed by a subcommittee of the Council. The Broadgreen Society was set up in 1980 by “friends” of the house. The objectives of the Society, as set out in the Broadgreen Handbook, are:

- To assist in the preservation and improvement of Broadgreen House as an historic building of the Nelson City
- To provide facilities at Broadgreen House for public inspection and enjoyment, education and research
- To provide a statement of purpose, collection and management policy for Broadgreen House.

From 1994 all takings at Broadgreen have been credited to the Society. This arrangement was set up when the Society had no external revenue.<sup>10</sup> The Society is now in a good financial position, with around \$48,000 accumulated funds invested (significantly more than its annual expenditure). There is currently no agreement between the Council and the Society about how money raised through takings or other means is spent or the proportion that should be spent on certain needs.

In a document dated 9 February 1995 signed by the Society Chairman and the Manager Parks & Recreation the responsibilities of each party were set out:

- the Society is responsible for preservation and conservation of the house articles, furnishings and drapes, souvenir sales, publicity, volunteers, employment of any additional staff (such as required over busy periods) and some office administration
- the Council is responsible for house exterior, staff salaries, house interiors as listed, alarm system, cleaning, some administration, outdoor signage and advertising annual Rose Day. It also provides the Society with a treasurer.

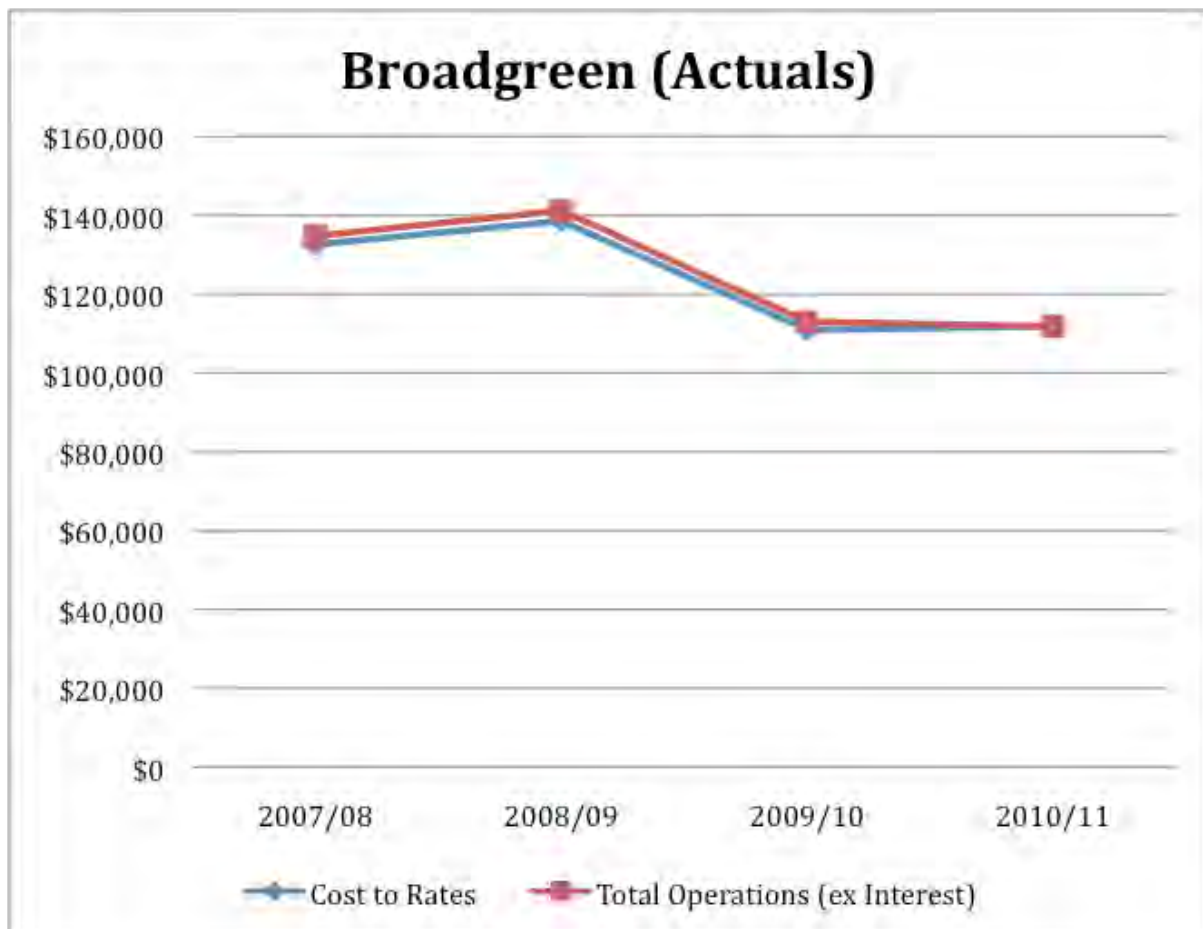
However, there are now areas of work being undertaken by the curators at the direction of the Society. The division and overlap of roles and responsibilities between the curators, volunteers, guides and the Broadgreen Society requires clarification and agreement.

### 7.4.2 Demand/Visitor Numbers

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 2010 there were 1822 visitors to the House, 1118 to the Centre. In the year to June 2011, 14 classes, approximately 450 children visited. However the education programme at Broadgreen was suspended in 2011 and is not operating in 2012, due to changes in staff and interest from schools, and this will impact on visitor numbers. Visitor numbers drop off considerably during the winter months.

<sup>10</sup>The intention was that the money would go back into maintaining the Broadgreen collection, paying extra staff as the society deemed necessary and promoting Broadgreen House to increase visitors.

### 7.4.3 Financial performance



The majority of operational costs are curatorial salaries. One curator works there 12 hours per week, the senior curator 3 days per week in summer, two in winter.

Cost to ratepayers per visitor is significantly higher for Broadgreen than for other heritage houses. This needs to be addressed as the higher cost does not seem justified on the basis of visitor numbers. The remedy might involve looking at options for sharing the curatorial staff across the Council's heritage houses (refer 7.9.3) to better balance staffing costs and provide a shared service. It would also seem sensible to reduce the opening hours, particularly in winter, given visitor numbers. This will need to be discussed with the Broadgreen Society before any decisions are made.

## 7.5 LEVEL OF PROVISION

The three heritage houses provide opportunities for the community to engage with aspects of Nelson's Early European heritage through both the buildings and heritage exhibitions/events held at the houses. They also provide passive recreation and leisure opportunities for Nelson's aging population.



## 7.6 CUSTOMER SATISFACTION

In its annual residents survey, the Council asks a general question about satisfaction with Council's performance across culture, heritage and the arts. In 2010 residents satisfaction with culture, heritage and the arts was rated at 49% and ranked 13th in terms of its priority relative to other areas. In 2011 residents satisfaction with culture, heritage and the arts was rated at 61%. Importance/priority was not surveyed in 2011.

## 7.7 PAST PERFORMANCE

In the 2007 AMP, levels of service related to quality; safety; availability; utilisation; and effectiveness. In the last Long Term Plan, the level of service for heritage assets was 'heritage assets are managed to ensure their protection and ongoing financial sustainability'. The measures were condition assessment of the assets, cost to rates and visitor numbers. The targets were that heritage assets are maintained to a Level 3 (average) and the cost of maintaining heritage attractions is commensurate with visitor numbers.

- Isel has met the level of service for condition assessment; visitor numbers have been declining as has the cost to rates.
- Broadgreen has met the level of service for condition assessment, however, compared to the other houses, visitor numbers are very low relative to the cost to rates.
- Melrose has met the level of service for condition assessment; cost to rates decreased over the period of the last AMP.

## 7.8 LEVELS OF SERVICE

Level of Service	Measure	Target
<b>Council's heritage houses provide a range of opportunities to experience, celebrate and learn about Nelson's history and stories.</b>	Number of public exhibitions held by Isel and Broadgreen each year	Isel and Broadgreen will provide at least 2 exhibitions and 1 event relating to Nelson's history each year
	Number of visitors	Maintain or increase visitor numbers each year
	Customer satisfaction measured through user survey in 2014/15	At least 75% customer satisfaction
<b>Council's heritage houses are protected and preserved.</b>	Heritage assets are maintained to an adequate level	Heritage assets are maintained to a level 3 (tidy) condition
<b>Council's heritage houses will provide value for money to ratepayers</b>	Maintenance cost per visitor is not increasing and, if possible, is reducing	Maintenance cost per visitor does not increase over the period 2012/13 to 2014/15 and decreases for Broadgreen (as a result of spreading curatorial costs across houses)

## 7.9 ISSUES FOR THE HERITAGE HOUSES

There are a number of opportunities and risks associated with council ownership of the Heritage Facilities, which will require addressing over the first three years of the plan:

### 7.9.1 Administration

- Currently Council has assigned decision-making rights to the various volunteer groups that run the houses. While some of the facilities are running well under this model, it does mean that Council has limited influence over spending decisions and the levels of service delivered by these assets. Administration and funding arrangements also vary across the houses and there is a lack of clarity around the roles and responsibilities of Council vis a vis the volunteers at the houses.
- This is particularly so at Broadgreen House and has contributed to tension between Council staff and the Society. The need to address this issue at Broadgreen was a key recommendation of a 2006 NZ Museum Standards Scheme report on Broadgreen. There is an opportunity for the Council to simplify and align management and funding arrangements across the houses. This will need to be undertaken in consultation and agreement with the Trust or Society at each house.

### 7.9.2 Strategy

- Clear strategy for the houses: Council's vision/strategy for the houses needs to be clearly stated and understood by the Trusts/Society.

### 7.9.3 Co-ordination and Collaboration Between Heritage Facilities

- There are opportunities to increase 'value for money' for ratepayers by improving co-ordination and collaboration between the houses, between Founders and the houses and between the Council and houses: to utilise the benefits of joint marketing and publicity; curatorial skills; exhibition planning; training; support from the Nelson Provincial Museum, bookings; volunteer pool and strength in numbers; and improve the morale of staff.
- Reliance on volunteers and difficulties in recruiting new volunteers or volunteers with appropriate skills places pressure on existing volunteers, impacts on the ability of Council staff to do their job as they get called on to fill the gaps, and potentially impacts on the quality of service provided to the public. Added to this, there is a risk that key staff or volunteers leave one or more of the houses and no successors are found to replace the dynamism, skills and knowledge. Greater co-ordination and collaboration between the houses may go some way to mitigating this risk.

#### **7.9.4 Earthquake Risk**

- Founders Heritage Park, Melrose House and Isel House require earthquake assessments and may require earthquake strengthening. Funding has been allocated for assessments and for strengthening (indicative) in this AMP. Broadgreen has been assessed as a category C (i.e. between 33% and 67% of New Building Standards) and therefore exceeds the minimum trigger requirement (33%) for a building to be classified earthquake prone. On this basis funding has not been allocated for strengthening of Broadgreen in this AMP.

#### **7.9.5 Adaptive Reuse**

- Given that Melrose House has been adapted for use primarily as a commercial operation (venue hire, café) and has not been restored to strict heritage guidelines, there is potential in the future to consider ways of protecting the asset that do not require Council ownership and ongoing rate payer funding.
- The Museum's survey showed that visitors are only likely to visit one heritage attraction in the group. The Council needs to work to develop points of difference through exhibitions, promotion and marketing.

### **7.10 FUTURE WORK FOR THE THREE HERITAGE HOUSES**

- In consultation with the Trusts/Society, review administration and funding arrangements across the houses with a view to:
  - simplifying administration and funding arrangements across the houses
  - providing the Council with greater influence over what admission fees are spent on to ensure levels of service are met
  - improving co-ordination and collaboration between the houses, other Council-owned facilities and Council staff
- Work in partnership with the Broadgreen Society on a plan to:
  - determine the feasibility of limiting opening hours and/or closing over the winter months to reduce the cost per visitor (taking into account the impact on the security and dampness of the house and use of the Centre if it is closed for a significant period)
  - potentially move Council curatorial staff currently based at Broadgreen to Founders Park to make better use of their skills and knowledge across the Council's heritage facilities
  - clarify the future ownership of the Broadgreen Centre.



## 8. FOUNDERS HERITAGE PARK

### 8.1 DESCRIPTION OF THE ASSET/ACTIVITY

Founders Heritage Park (Founders) is a fenced park of about five hectares on Atawhai Drive, an inner-suburban location that is a few minutes from Nelson's central business district and close to the Whakatu Marae, Neale Park, Miyazu Gardens and the Centre of New Zealand.

It contains 32 buildings of mainly wooden construction arranged to create a 'village'. These buildings include 12 original buildings that have been moved to Founders from elsewhere in the Nelson region. They are used for six main purposes, with some used for more than one:

- to house displays of heritage artefacts
- to lease to various small businesses and community organisations that are mostly all on generic lease agreements of five years, with two five year right of renewals expiring in 2026 (there are currently 28 separately tenanted buildings/rooms)
- to let out for major events, private functions, meetings, courses, weddings and other short-term purposes
- as sorting and storage space for the Founders Book Fair
- to store a range of heritage artefacts and other items
- as administration space for Founders' staff and volunteers

In addition Founders also provides:

- five open grassed spaces on which events take place
- a Bristol Freighter aircraft
- a lake and a children's playground

The Council have commissioned two pou whenua that stand at the common boundary of Founders Heritage Park and Whakat Marae. The pou represent strong links and relationships/whanaungatanga with iwi of Whakat Marae, Founders Heritage Park and Nelson City Council.

The Council employs a full time manager, a curator for two days a week (who also works 12 hours per week at Broadgreen), a part-time maintenance person and two part-time administration and customer service officers. The front of house is manned by 10 core volunteers during the weekdays, 2 four hour shifts per day for 5 days of the week.

Founders has a close relationship with the Museum and gains assistance with an operations manual for the collections policy, Museum standards and links in to the outreach programme from Te Papa.

The areas where Founders has some synergy with the historic houses are curatorial, venue hire and events, public/private partnerships, marketing and publicity, staff employment and management and front of house training. All facilities also have "friends" groups that have provided invaluable knowledge, financial support and volunteers together with a link to the local community.

Founders Heritage Park is a Council facility developed originally by a group of "friends", Founders Inc. The Park was transferred to Council in 1995. At this time a steering committee was set up to guide operations at the Park and operated until 2005. In 2005 a subcommittee replaced the steering committee and advised on the development of a 10 year Founders Heritage Park strategic plan for 2007–2012.

The Friends of Founders Trust provides external support through fundraising and can apply for external funding.

Volunteers also run an annual book fair which raises a significant amount for capital development at the Park (around \$100,000).

## 8.2 LEVEL OF PROVISION

Since 2007, provision of services at Founders Heritage Park has been guided by the Founders Heritage Park Strategic Plan 2007-2012, which includes an action plan and milestones to support the vision and goals. Most of the actions and milestones in the Strategic Plan have been achieved.

Prior to the development of the Strategic Plan, there was confusion about the role and focus of Founders, i.e., was it primarily a heritage or events space, was it for locals or an attraction for visitors. The lack of clarity and mix of roles led to Founders not fulfilling any of them very well.

The Strategic Plan has provided greater clarity around the role and focus of Founders, and implementation of the Strategic Plan has resulted in significant improvements in the use and running of the park. The previous subcommittee recommended that “Founders continue to have both heritage and community aims but, in future, the former would support the latter rather than the other way round”.

The Heritage AMP replaces the Strategic Plan in setting the strategic direction and priorities for the management of Founders. The vision and goals from the Strategic Plan have been incorporated into the AMP as they remain relevant to the management of Founders. Implementation of the AMP will be supported by the development of a new Founders business plan.

The vision for Founders is:

*Founders Heritage Park: Nelson’s community and heritage park, where community events and activities are presented, developed and housed in an attractive heritage setting.*

This Vision is supported by six key goals:

- **Events Goal: to establish Founders as the first-choice regional location for an increasing number and range of events.**

There has been a significant focus on this goal since 2007 and the number and range of events has been increasing [to provide data]. Increasing Founders use as an events venue will continue to be a key priority for the next three years.

- **Development Goal: to maintain and add to Founders’ buildings and gardens thereby improving facilities for visitors and tenants and optimising the use of space in the Park** (refer 8.1 for number of buildings/attractions).

There has been steady progress on developing Founders. The Bookfair is a key element in this goal as it funds development work at Founders.

- **Tenants Goal: to retain and attract tenants to Founders who contribute to the life of the Park.**

The focus for the next three years is to bring occupancy close to 100%. A tenancy policy has been developed and tenancies currently hover around 85%. In the longer term growing this revenue stream would depend on the viability of bringing more buildings into the Park.

- **Collections Goal: to update and simplify Founders' collections and disposals policy so that its displays and collections can be improved and rationalised.**

The Council has developed and is implementing a collections policy which has helped rationalise the collection. However there is still work to do on this goal.

- **Marketing Goal: to attract an increasing number of Nelsonians to Founders.**

A marketing plan has been developed. There is funding for marketing in this plan and also an opportunity has been identified for joint marketing with other heritage assets.

- **Financial Goal: to improve Founders' finances so that it becomes less dependent on rate-payer support (refer 8.4).**

All the above goals feed into the goal of making Founders more financially sustainable.

While all the goals remain important a particular priority over the next three years will be increasing the number and range of events at Founders and increasing tenancies. Achieving these goals is critical to the financial sustainability of Founders.

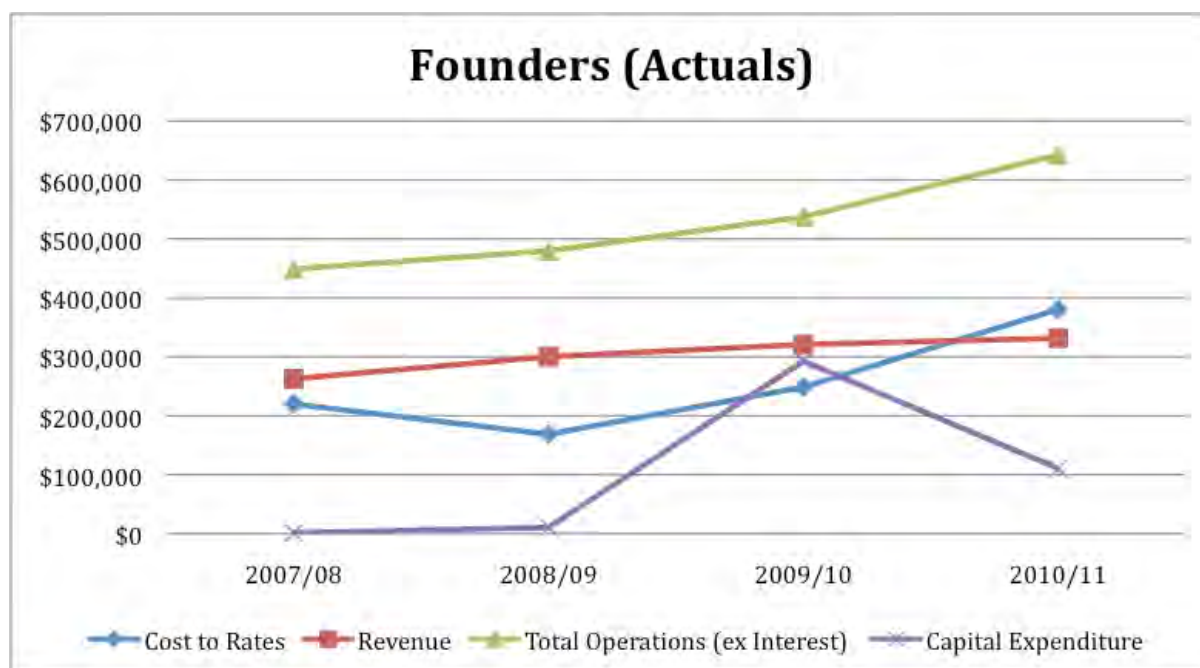
### 8.3 DEMAND/VISITOR NUMBERS

In 2010/11 the total number of visitors to Founders Park was close to 90,000, slightly down on the previous year, which exceeded 100,000. Of those visitors, 12,000 were paying visitors from outside the region securing almost \$43,000 in admission income, on a par with the previous year; 68,000 visitors came mostly to events held at the park; and 8000 were from venue bookings. Approximately 60% of visitors are local; 25% are domestic; and 15% are international. Of the local visitors, approximately 86% come from within the NCC boundaries and 14% from within TDC boundaries.





## 8.4 FINANCIAL PERFORMANCE



### Revenue

In 2010/11, revenue sources other than rates were:

- Rent – \$86,119
- Venue hire – \$45,000
- Admissions (tourists as locals have free admission) – \$42,634
- Recoveries (electricity, phone, water) – \$38,380
- Book fair proceeds – \$117,240
- Other – \$2,144.

## 8.5 PAST PERFORMANCE

Levels of service in the 2007 AMP primarily related to quality; safety; availability; utilisation; and effectiveness. In the last Long Term Plan, the level of service for heritage assets was:

Heritage assets are managed to ensure their protection and ongoing financial sustainability. The measures were condition assessment of the assets, cost to rates and visitor numbers. The targets were that heritage assets are maintained to a Level 3 (average) and the cost of maintaining heritage attractions is commensurate with visitor numbers.

Founders has met the level of service for condition assessment, visitor numbers have increased but cost to rates has also increased slightly.

## 8.6 ISSUES

The current Founders Park Strategic Plan will expire in 2012. While most of the actions in the Strategic Plan have been implemented, the vision and goals remain relevant to the operation of the Park and these are reflected in the levels of service.

Currently the majority of Book Fair funds are ring-fenced for capital development at Founders and a portion is used to pay off a loan, which will continue under this AMP.

One of the development areas requiring capital investment is the need to improve the accessibility of the park and its facilities. This is particularly important given the ageing population, a significant number of who have disabilities. An accessibility audit has been commissioned and will identify priorities for the work programme. Any additional work arising from the audit will be funded from the Renewals budget but, depending on the outcome of the audit, this may need to be reviewed for the next Activity Management Plan.

The Council should be looking at opportunities to increase the number of visitors to the Park through events and exhibitions. The Council will be looking at opportunities to improve co-ordination and collaboration between its heritage facilities (refer 7.10), including opportunities for joint marketing and publicity with a view to reducing costs and increasing visitor numbers.

## 8.7 LEVELS OF SERVICE

Levels of service for Founders Heritage Park are driven primarily by the goals set out in the Strategic Plan.

Level of Service	Measure	Target
Founders Heritage Park is the first-choice regional location for an increasing number and range of events, private functions and conferences	Number of events held at the park	Attract at least 8 events to park each year.
	Level of income from conferences or conference related business to use facilities at the Park	Income from conferences has increased for each year from 2012/13 to 2014/15
Retain and attract tenants to Founders Heritage Park that contribute to the life of the Park	Level of tenanted spaces at the Park	2012/13: 85% of available spaces are tenanted. 2013/14: 90% of available spaces are tenanted. 2014/15: 95% of available spaces are tenanted
The collection items at Founders Heritage Park are used to tell early Nelson's stories to visitors and assist in attracting paying visitors to the Park during the summer season	Quality of interpretative displays	Achieve at least 2 new or improved displays each year Manage the existing collection in accordance with the Founders Collections Policy
	Numbers of local and paying visitors	Numbers of local and paying visitors increases each year from 2012/13 to 2014/15
Heritage facilities and activities through Founders Heritage Park will be easily accessible for people, thereby enabling all to access and enjoy activities at the Park	Number of accessibility barriers addressed. (Barriers identified through an accessibility audit of Founders Heritage Park).	Accessibility barriers are prioritised and the highest priorities are addressed within available funding.

## 8.8 FUTURE WORK

Further work to increase the number of events and visitors to Founders

- Further work to improve tenancy levels
- Further work to improve the accessibility of the facilities, particularly for those with physical disabilities
- Further work to rationalise the collection at Founders
- Foster and develop key strategic relationships, e.g. with Whakatu Marae, to attract and grow new audiences
- Collaboration between Founders, the Council, the Museum and other Council-owned heritage attractions to improve co-ordination of events and activities, particularly heritage events and activities.





## 9. NELSON PROVINCIAL MUSEUM PUPURI TAONGA O TE TAI AO

### 9.1 DESCRIPTION OF THE ASSET/ACTIVITY

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).

Tasman Bays Heritage Trust is a charitable trust and is registered with the NZ Charities Commission. 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 Tasman District Council and Nelson City Council [Deed of Trust 2000]. The Trust is a council-controlled organisation with statutory obligations under the Local Government Act, 2002. Council stakeholding is structured as a 50:50 alliance. The Trust is bound by foundation funding agreements [Memorandum of Understanding 2000, 2009], [MOU Variation 2006], as well as the Long Term Council Community Plan of each Council. The Trust has a partnership contract with the manawhenua of Whakatu, Motueka and Mohua [Memorandum of Understanding 2007, 2010].

As a CCO, the TBHT is required to submit a Statement of Intent annually (SOI), which sets out the intentions and expectations of the Trust for the financial year to which it applies. The SOI must align with the Statement of Expectations (SOE) set by the Council. The SOI is accompanied by the Strategic Plan agreed by the Board of Trustees. The Council will ensure that the objectives set out in its SOE for the TBHT, and the deliverables set out in the TBHT's SOI and Strategic Plan are aligned with the Levels of Service in this AMP.

The Museum houses two main gallery spaces featuring permanent and temporary exhibitions, a classroom, museum shop and rooftop garden.

TBHT also own a building that it uses for storage and research at Isel Park. The land that the building occupies is leased from the 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.

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."

The Nelson Provincial Museum provides a diverse range of public services:

- Accession of heritage objects and material considered to be of local, regional or national significance.
- The Museum provides long-term storage, care and preservation under a controlled environment.
- Interpretation and public presentation of our bi-cultural regional heritage in the permanent exhibition.
- Archive and research library of manuscripts, books, maps, documents and records with public access.
- Photographic collection available for research and reproduction, with public access.

- Website presentation of the Museum, its collection and exhibitions provides public access to a wider audience.
- The Educational services (and LEOTC programme) for our regional schools.
- Special exhibitions with heritage or science themes, to appeal, engage and interest the public.
- Museum collection is a basis for research by institutions, academics and the general public.
- Museum staff offer professional assistance and advice to other heritage institutions across the region

## 9.2 CUSTOMER FEEDBACK

In September 2011, Versus Research was commissioned by the Council to conduct a resident opinion telephone survey, specifically to gauge satisfaction with Council funded arts and heritage facilities as well as to measure priorities towards future funding for these facilities. The Nelson Provincial Museum was included in the survey. Both NCC and TDC residents were surveyed.

- The museum was the most visited facility (55% overall; 59% NCC and 47% TDC residents)
- 72% said they had visited the museum only “once or twice” in the past two years; 20% had visited 3-5 times; and 7% had visited more than 5 times. 31% of NCC residents had visited the museum more than twice in the last two years (and 14% of TDC 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 55% overall);
  - higher income earners, i.e. \$ 50,000 p.a. or more (63% compared with 55% overall); and
  - family with school age children (68% compared with 55% overall).

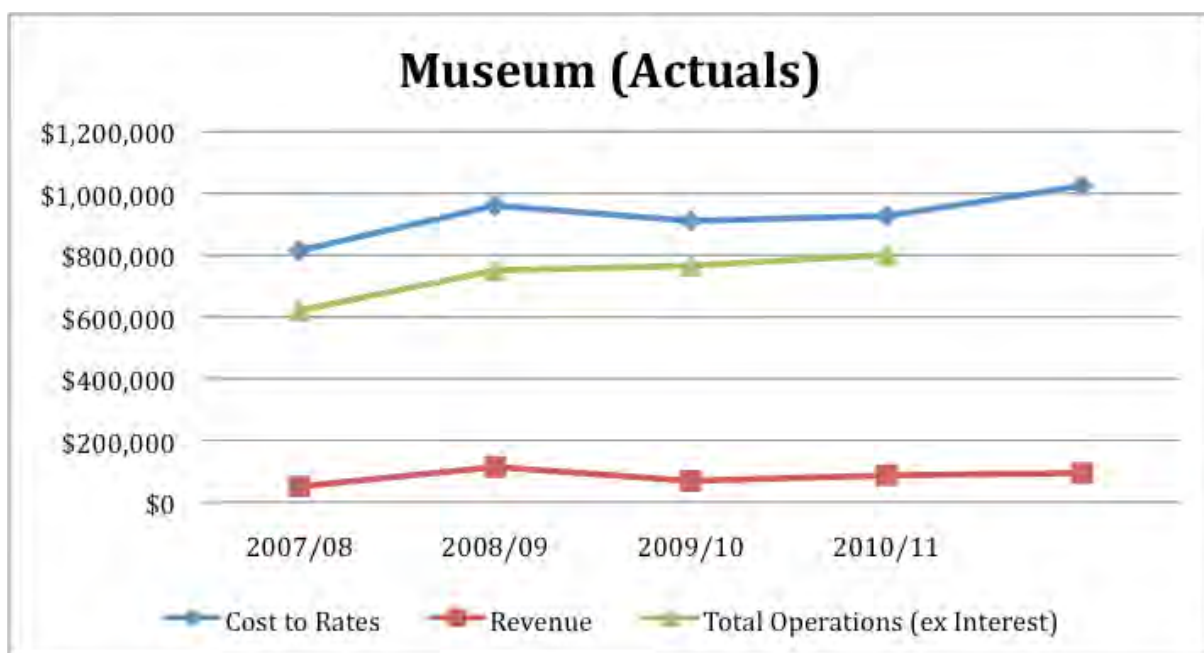




### 9.3 DEMAND/VISITOR NUMBERS

Total visitor numbers for the year to 30 June 2010 were 50,000. This figure includes 10,800 school students who came through the LEOTC education programme.

### 9.4 FINANCIAL PERFORMANCE



The Museum currently receives an annual CPI increase.

Since opening at the new site the museum has experienced financial difficulties. The NCC and TDC each provided the TBHT with a 5 year loan to the value of \$1.2 million. The loan is due to be paid back by June 2012; however, it is very unlikely that TBHT will be in a position to do this. NCC and TDC have advised TBHT that they will not be calling in the loan when it falls due in June 2012; however, the status and future management of the loan needs to be resolved between the three parties.



## **9.5 PAST PERFORMANCE**

The Museum did not have specific levels of service in the 2007 AMP, however the 2009-19 Community Plan levels of service were that heritage assets be managed to ensure their protection and ongoing financial sustainability. The measures relevant to the museum were cost to rates and visitor numbers.

### **9.5.1 Museum Storage**

Tasman Bays Heritage Trust (TBHT) leases land at Isel Park for the operation of the Nelson Provincial Museum. The lease expires in 2022. The community lease is for the land only, and is set at a low rental of \$451.00 per annum. 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 housing problems are directed to Nelson City Council. The Nelson Provincial Museum also receives Nelson City Council Community Assistance funds for specific projects such as digitising collection images.

A study commissioned by TBHT identifies a shortage of quality storage space and a lack of appropriate facilities for staff, volunteers, and researchers. Storage at Isel Park is estimated to reach capacity by 2014. The key issues can be summarised as:

- Lack of space for storing objects
- Lack of 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 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.

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.

The Council is currently looking at options for providing quality museum storage capacity. This includes, but is not limited to, expanding or building a new facility at Isel Park. The cost of improving museum storage is likely to be in the \$5–\$7m range if Council funds an expanded or new facility. Funding of \$3.75m has been provided in years 3 and 4 of the Nelson Long Term Plan for improving museum storage. Council plans to discuss governance and joint funding with Tasman District Council, as TDC has not included a half-share of funding in its LTP.

Level of Service	Measure	Target
<b>Celebrate the special nature of the history of the region through exhibitions</b>	Annual customer satisfaction survey	At least 80% of customers are satisfied or very satisfied with the major exhibitions held at the museum.
<b>Protect and preserve the regions treasures/taonga</b>	Manage the region's collections according to acceptable standards	Meet acceptable museum standards
<b>The museum will be financially sustainable</b>	Strength of balance sheet	The TBHT's balance sheet strengthens each year from 2012/13 to 2014/15

## 9.6 FUTURE WORK

- Address museum quality storage issues through the implementation of Council's preferred option for increasing storage space.
- NCC to work with the TDC and TBHT to resolve status and management of the loan to the TBHT.



## 10. HISTORIC CEMETERIES

### 10.1 DESCRIPTION OF THE ASSETS/ACTIVITIES

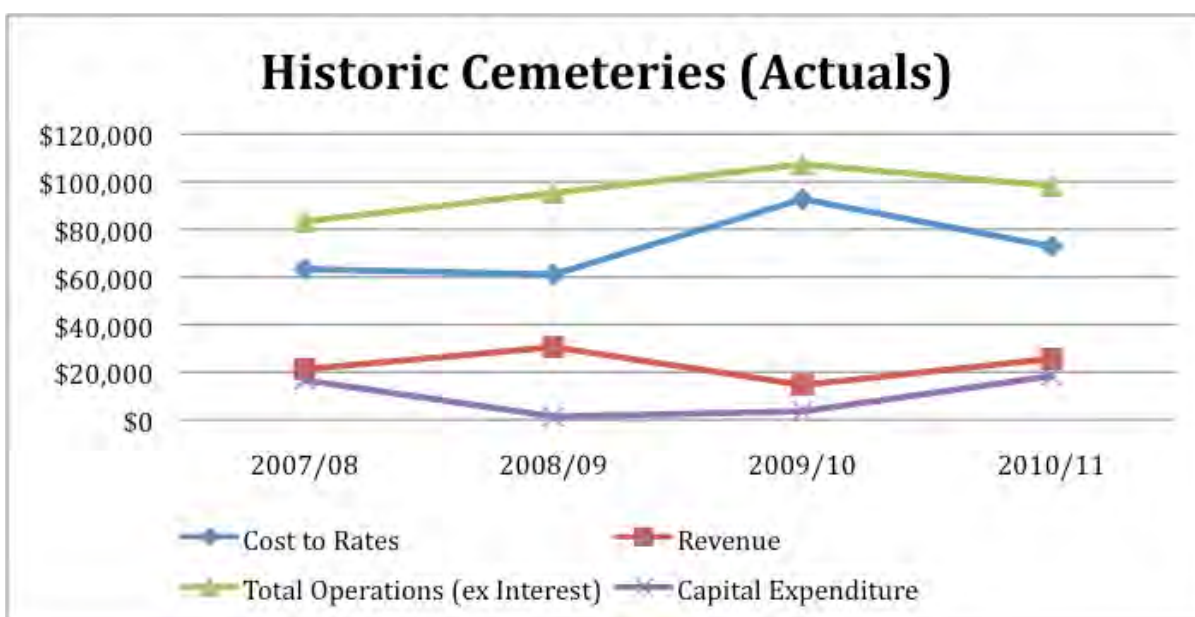
The Heritage Activity Management Plan covers four historic graveyards which are no longer operational but are maintained by the Council in a park-like setting. These include: Hallowell, Quakers Acre, St Andrews and The Cliffs historic cemeteries. Whakapuaka is also an historic cemetery but is covered under the Community Facilities Activity Management Plan as it is still operational.

### 10.2 LEVEL OF PROVISION

Cemeteries are valuable historic resources and Nelson's historic cemeteries tell important stories about its early European settlement. It is important that the city has the capacity to maintain these heritage sites into the future with some surety, particularly where headstones are deteriorating. Directional signage and interpretive information should be installed and maintained at the historic cemeteries. This could be done in partnership with community organisations or families who have an interest in the cemeteries. For example, the Council collaborated with the Quakers Society to install interpretative information at the Quakers Acre cemetery. The cemeteries located within the city are included on some of the historic trails that the Council has developed in partnership with the community.

The Parks and Facilities team contract out the maintenance of the cemeteries and these should be maintained to a neighbourhood park standard.

### 10.3 FINANCIAL PERFORMANCE



Note: Includes all cemeteries except Marsden (covered under the Community Facilities AMP)





## 10.4 PAST PERFORMANCE

Previous levels of service focused on meeting standards and guidelines relating to condition, signage, and safety. The Council has generally met levels of service in relation to all three. The addition of new features e.g. benches have been in keeping with the historic nature of the cemeteries.

### 10.4.1 Levels of Service

Level of Service	Measure	Target
<b>Historic cemeteries are maintained to a neighbourhood park standard and meet the needs of visitors</b>	Condition of the cemetery	All historic cemeteries are kept in a tidy condition.
	Public know where entrances are and where interpretive information is located	There are no complaints from the public about signage and markers at historic cemeteries.



## 11. OTHER HERITAGE ASSETS

### 11.1 MONUMENTS AND MEMORIALS

There are 43 monuments on Council owned land and 29 memorials (28 of which are the historic graves at Fairfield Park). These are listed in the Asset Management System (AMS), however, there is currently no agreed definition of monument within the AMS. Monuments on Council-land range from war memorials to those that commemorate significant events in Nelsons' history and are maintained by the Parks and Facilities team.

### 11.2 CAWTHRON (Cathedral) STEPS AT PIKI MAI (Church Hill)

The first steps on this site were built of wood in 1858. In 1913, Thomas Cawthron donated £1,800 to build the Church Steps, made from New Zealand's only construction granite, quarried from Tonga Bay in what is now the Abel Tasman National Park. They were designed by Arthur Reynolds Griffin. The steps have a Category 1 listing from the Historic Places Trust and are maintained by the Parks and Facilities team. The steps have recently been renovated.



### 11.3 ROCKS ROAD STANCHIONS/STANCHIONS AND CHAIN

The Rocks Road stanchions and chain have a Category 1 listing by the Historic Places Trust. The original stanchions were designed (by Samuel Jickell) in the 1890s and introduced in two stages in the early 20th century. Two major additions/alterations projects were undertaken in 1958/59 and 1962/63 which resulted in some possibly new and some possibly the best of the old being placed along the mid 20th century additions and alterations. There are 682 stanchions spaced at 3.2m apart along the sea wall. Due to the series of additions and alterations very few of the stanchions eventually placed along the 19th century seawall remain in their original locations and condition.

A Rock Roads Stanchions and Chain Conservation Plan was commissioned by Council staff but has not been presented to Council<sup>11</sup>. The plan was informed by the Council's own thorough condition assessment, description and definition of every chain and numbered bollard from end to end. The plan identified that the heritage value of the stanchions and chain lies in their "collective" rather than individual qualities. This is because very few of the elements listed by the Historic Places Trust in 1989 are in their original location and none of the original stanchions or original lengths of chain are in anything approaching their original condition. Collectively "they have an absolutely major heritage value worthy of conserving in a manner which allows for and accepts their individual shortcomings..." The plan sets out the history of the stanchions and chain, including an analysis of the location and relocation of the stanchions, over the years.

The Council is responsible for the maintenance and upkeep of the heritage-listed stanchions and chain, although the land is owned by NZTA who have an obligation to meet health and safety standards. Currently the stanchions and chains on their land do not comply with the Building Code and this is being raised with them. Any proposal to remove or alter the chain and stanchions would require both agreement from Council and resource consent. The maintenance and protection of the seawalls (not listed under the NRMP or NZHTA) which support State Highway 6 are the responsibility of the New Zealand Land Transport Authority (NZTA). The Transport Activity Management Plan includes a proposal to seek funding from NZTA for the design of a 4 metre wide cycle/walkway around Rocks Road. If this goes ahead, it may require alteration to the seawalls and the stanchions and chain.

The Council is aware of requests from the community for the sea wall along Rocks Road to be heritage listed. The draft Heritage and Iwi Inventory reports (refer RAD1224667) recommend that the sea walls be added to the NRMP heritage list alongside the stanchions and chain. The Council will be consulting with the NZTA along with other affected landlords as part of the Heritage and Iwi Inventory project.

<sup>11</sup>Rocks Road Stanchions & Chain Conservation Plan, Ampersand Architecture Heritage Consultants, 2009.



## **12. OTHER HERITAGE ACTIVITIES**

The following heritage activities have not been included in previous AMPs but represent a significant component of Council's contribution to supporting and developing community engagement with Nelson's heritage.

### **12.1 WALKS/INTERPRETATIVE PANELS**

The Council has funded the development of 19 heritage walks within Council boundaries, supported by historical information, maps, signs, and markers. The Council also funds downloadable podcasts for each of the walks. This AMP does not provide for the development of new walks beyond the 19 already in place, given the other priorities set out in the AMP.

The Council has erected a number of interpretative panels in key historic sites, which explore a variety of heritage themes. The Interpretative panels provide a focal point around which walks can be linked. The Council will continue to increase the number of these panels across key sites.

The Council is also looking at opportunities to promote the walks to a wider section of the community e.g. those with disabilities. It will continue to work with NelsonTasman Tourism to promote heritage as part of the tourist experience.

In a recent user survey, 100% of those who took part on guided walks, run by the Council's Arts and Heritage Adviser, rated them highly and wanted to go on more. Currently guided walks are offered during Heritage Week and in conjunction with city festivals. A number of locals have expressed an interest in taking walks; however, research from other New Zealand cities indicates that a paid co-ordinator is needed for a service to run smoothly at regular timeslots. This allows forward bookings.

### **12.2 HERITAGE WEEK**

The Council also runs Heritage Week, which coincides with World Heritage Day on 18 April each year. Heritage week is an opportunity to promote the Council's heritage facilities and activities and highlight heritage activities within the community. This is organised by the Council's Heritage and Arts adviser.

### **12.3 THE PROW WEBSITE**

The Council contributes to "The Prow", a website featuring historical and cultural stories from Nelson, Tasman and Marlborough. The Prow is run by Nelson Libraries and is managed under the Community Facilities Activity Management Plan.

## 12.4 HERITAGE FUND

Following the adoption of the Whakatu Nelson Heritage Strategy in 2006, the Nelson City Council established three avenues of financial assistance for heritage property owners and others who are concerned with caring for the city's heritage. This assistance for heritage acknowledges the private costs that are incurred for the public benefit that heritage provides. The three avenues are:

- Zero Fees for resource consents for non notified applications to conserve and restore a heritage item
- Rates remission for heritage maintenance in three year cycles – application required for up to 50% remission for Category A and up to 25% remission for category B heritage items
- Heritage Project Fund, which is a contestable fund for individuals and groups seeking financial assistance towards a specific project 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 (refer pamphlet RAD 786823).

The Council has recently completed draft Heritage and Iwi Inventory reports. Two working groups – a Heritage Inventory Working Group and an Iwi Inventory Working Group – were established to provide advice to the Council on historic heritage protection, including Māori cultural heritage, in Nelson. The projects have identified some additional historic heritage sites to be listed in the Nelson Resource Management Plan (NRMP). In response to that advice, the Council has agreed that historic heritage be recognised and protected within the Nelson region through the development of a proposed Plan Change to the NRMP which will:

- i) ensure the current heritage listings are appropriately updated;
- ii) ensure that the methods of protection and recognition within the NRMP are reviewed and amended if needed;
- iii) engage with affected landowners, interest groups and the general public on any proposed plan changes and changes to the Council's financial help for heritage properties.

## 12.5 FUTURE WORK

- Develop a mechanism for improving the promotion and co-ordination of the Council's historic attractions, e.g. complementary exhibitions and events and/or calendar, to showcase the special characteristics of each of the attractions, including the heritage houses and parks and improve community and visitor engagement with Nelson's heritage attractions. This will require input from the community and heritage interest groups
- Investigate the feasibility of employing a part time person to co-ordinate volunteer heritage walk guides.
- Consult with NZTA on heritage listing of the sea walls.



## 13. MANAGING THE ASSETS

### 13.1 ASSET RISKS

The main risks identified are:

- Trip / fall hazards caused by asset failure (flooring, balustrading, xxx? malfunction).  
These risks are dealt with through operational and maintenance budgets and where applicable, renewals budgets.
- Failure of fire safety provisions (alarms, fire egress, sprinklers, extinguishers, hoses).  
These risks are dealt with through routine operational and maintenance budgets to ensure compliance with the relevant legislation
- Major failure of building through poor design or maintenance  
These risks are dealt with through unprogrammed (reactive) operational and maintenance budgets.  
The design risk is dealt with in the renewals and new development programmes by ensuring that all work being tendered for and only appropriately qualified designers are asked to submit tenders.  
The maintenance risk is dealt with through the operational and maintenance budgets also by ensuring that the buildings are maintained to a high standard and ensuring that all the legislative requirements are met. All consultants and contractors are screened to ensure they have suitable qualifications to perform the required duties.
- Natural hazards e.g earthquakes  
These risks are dealt with through the capital budgets for Council-owned heritage buildings (e.g. for earthquake assessment and improving the structural performance of heritage buildings) and through the operation and maintenance budgets to ensure compliance with the relevant legislation and the Council's Earthquake Prone, Dangerous Buildings Policy. There are risks to privately owned heritage buildings listed under the NRMP. While some Council funding for earthquake strengthening is available to private owners through Council's heritage incentives funding schemes, this is at a relatively low level (refer section 12.4).



## 13.2 LIFECYCLE MANAGEMENT

### 13.2.1 Maintenance Strategies

Two basic categories of maintenance should be performed on heritage facilities:

#### 13.2.1.1 Planned Maintenance:

The scheduling of non-critical maintenance (i.e. where business risks associated with failure to perform are low) is either the responsibility of Council staff, subcommittees, contractors, incorporated societies or trusts who prioritise the work to meet specified minimum service standards. Such works include minor interior maintenance in respect of heritage buildings.

The scheduling of higher value or critical works is specified in respective maintenance contracts to ensure assets remain in satisfactory condition and to minimise the risk of asset failure. The timing and nature of these works are based on an assessment of factors such as:

- impact of failure,
- rate of asset decay,
- economic efficiency,
- weather, and
- NZ standards.

#### 13.2.1.2 Unplanned Maintenance:

Repair of assets required to correct faults identified by routine inspections and notification from users of the service. The following methodologies are implemented to ensure levels of service are maintained and risks managed:

The Contractor is required to maintain, an effective means of communication, to receive complaints and service requests and maintain a suitable level of preparedness for prompt and effective response

To respond to asset failures giving priority to achieving safety and environmental protection as quickly as possible by the most economic method available, making temporary repairs if major repairs or renewals are required.

Unplanned maintenance works are scheduled in accordance with the following priorities:

Safety of facility users or adjacent property owners may be compromised.

It is likely the area of distress may expand or the method of repair change such that the cost of any repair may increase.

Subsequent work may depend upon the completion of the work.

#### Maintenance Standards

Specifications for maintenance work are defined in performance based contracts where they are in place for culture, heritage and arts assets.

Generally the standards selected are associated with one or more of the following characteristics:

- public safety,
- national or local significance (unique environmental areas or heritage features),
- location (high or low profile areas),

- specialised use,
- high value due to maturity or quality of feature,
- high use, and
- high capital investment.

Different standards are applied to different facilities, and overall standards may be adjusted in response to community preferences and budgetary circumstances. It is the intention to achieve a consistent standard of management for like facilities in similar locations.

In all work undertaken the workmanship and materials used must be in accordance with 'best' industry practice.

### Renewal Strategies

In general Heritage Assets are maintained to ensure that levels of service standards are met.

This is achieved through planned maintenance as outlined above. The only assets that are subject to renewal in this plan are:

- Park furniture e.g. seats, tables, bins, signage and lights
- Hard surfaces e.g. paths
- Fences
- Infrastructure assets e.g. Water supply, drainage

Heritage houses are specifically not renewed but instead they are subject to on-going maintenance. The Heritage houses are all located in Horticultural Parks and so renewal of park assets is covered in the Parks and Reserves Asset Management Plan.

There has been ongoing funding set aside for park furniture renewals for historic cemeteries. Longer life assets for all categories will be covered by condition assessments to determine the timing of renewal.

### Asset Disposal Strategies

The development of asset management systems and asset condition / performance data allows planning for the disposal of assets through rationalisation of the asset stock or when assets become uneconomic to own and operate.

In all cases asset disposal processes must comply with Council's legal obligations under the

Local Government Act 2002, which covers public notification procedures required prior to sale and restrictions on the minimum value recovered, and the

The Reserves Act 1977, which covers procedures for changing or revoking the status and classification of reserves, including public notification prior to sale, resolution of objections, and a requirement to first offer surplus assets to the original owners.

The sale of surplus assets can be beneficial by either utilising the proceeds to repay debt and hence reduce loan servicing costs, or by improving service and facilities by investing the sale proceeds in new projects which are of direct benefit to the community.

### 13.3 ASSET MANAGEMENT SYSTEMS

A Council property register of land assets is maintained in the Council financial package. All plans and other records are kept in hard copy form. An asset register has been developed, together with a condition assessment of heritage assets. This is currently stored and analysed using Microsoft Excel. Heritage assets are recorded in the Hansen Asset Management System.

### 13.4 ASSET INSPECTIONS

The following table outlines the current type of checking and inspection frequencies for Historic Houses and Founders Heritage Park assets.

Asset inspections			
Asset	Frequency	Inspector	Checks
<b>Heritage Facilities</b>			
<b>Heritage Houses</b>	Biennially	Property Officer or contractor	Asset condition (visual only) and contractor compliance
<b>Founders Heritage Park</b>	Biennially	Property Officer or contractor	Asset condition (visual only) and contractor compliance

### 13.5 BUILDING WARRANTS OF FITNESS

Building Warrants of Fitness (BWOFF) applications are managed under contract. Buildings are inspected on a regular basis and warrants are automatically renewed prior to their expiry date.

All heritage facilities that require a BWOFF are currently certified and listed in the following table. Buildings that have Compliance Schedules are required to have an annual Building Warrant of Fitness. Compliance Schedules list the inspection, maintenance and reporting procedures for systems in a building (eg, lifts, fire alarms) to ensure continued operation.

Broadgreen House & Isel Houses do not have any systems that require a Compliance Schedule.

Building Name	BWOFF Expiry
<b>Broadgreen House</b>	not required
<b>Isel House</b>	not required
<b>Melrose House</b>	4 Sep 2012
<b>Founders Heritage Park</b>	21 Feb 2012
<b>Museum building Isel Park</b>	Nelson Bays Heritage Trust responsibility



## 14. FINANCIAL SUMMARY

### 14.1 FINANCIAL FORECAST

The ten year financial forecasts (2012-22) for the heritage facilities are shown in Appendix 1 of this Plan.

The tables in Appendix 1 outline the funding trends over the next ten years required to implement the recommended lifecycle work programmes in this Asset Management Plan. Projections are shown in dollar values current as at 1 July 2011.

Depreciation is shown in the financial forecast as it is an accounting requirement to depreciate heritage assets. However depreciation is not funded for heritage assets.

### 14.2 ASSUMPTIONS AND SENSITIVITY ANALYSIS

The following basic assumptions have been made in preparing ten year cashflow forecasts: All expenditure is stated in dollar values as at 1 July 2011 with no allowance made for inflation over the twelve year planning period.

- a) Maintenance projections are based largely on historical unit costs and levels of expenditure.
- b) Significant increases in the cash flow may result from more detailed evaluation of asset requirements.
- c) Council will continue to be involved in providing community services.

### 14.3 FUNDING STRATEGY

Councils 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 that 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 of 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 peoples actions (or inaction) then these people should pay.

Operations and maintenance for the heritage facilities are funded directly from rates. Capital expenditure is funded by way of load with Council's treasury management policy providing clear overall debt/rates ratio limit.

### 14.3.1 Revenue

Rates are the primary source of funds for Council to provide heritage facilities and events for the community. There are a number of other 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.

## 14.4 ASSET VALUATION

The following book values current as at 30 June 2010 have been completed for heritage assets based on those assets listed in the fixed asset register.

Facility	Book Value as at 30 June 2010
<b>Broadgreen House</b>	\$238,042
<b>Isel House</b>	\$120,403
<b>Melrose House</b>	\$173,797
<b>Founders Heritage Park</b>	\$1,270,646
<b>Historic Cemeteries</b>	\$297,902
<b>TOTAL</b>	<b>\$2,100,790</b>

## 14.5 CONFIDENCE IN FINANCIAL FORECASTS

Confidence grades are based on the following: A Highly reliable; B Reliable; C Uncertain; D Very uncertain.

Cost Area	Confidence Grade	Reason
<b>Operations &amp; Maintenance</b>	B-C	Reasonably high degree of confidence in contract prices.
<b>Renewals</b>	B	This AMP has used condition assessments to predict renewal requirements over the next 10 years resulting in greater accuracy of replacement timing and costs.
<b>Capital Development</b>	A- B	Generally very reliable for the first 3 years before dropping to a B rating in outyears.
<b>Disposal</b>	B	Disposal of assets at Founders Heritage Park – timing uncertain.
<b>Valuation</b>	C	The buildings within the heritage and arts activity area have not been revalued recently. The figures are based on cost less depreciation.



## APPENDIX 1 – TEN YEAR FINANCIAL PROJECTIONS

Income/Expenditure Type	Code Description	12/13 Budget \$	13/14 Est \$	14/15 Est \$	15/16 Est \$	16/17 Est \$	17/18 Est \$	18/19 Est \$	19/20 Est \$	20/21 Est \$	21/22 Est \$
<b>Managing Heritage &amp; Arts</b>											
<b>Base Expenditure</b>	Heritage Policy	0	0	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
<b>Programmed Expenditure</b>	Condition Assessments	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
	Heritage Activities Program	56,160	56,160	56,160	56,160	56,160	56,160	56,160	56,160	56,160	2,160
	Grant : Fairfield House	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
<b>Museum</b>											
<b>Base Expenditure</b>	Grant: NN Provincial Museum	807,221	807,221	807,221	807,221	807,221	807,221	807,221	807,221	807,221	807,221
<b>Investment</b>	Use of Funds	0	0	350000	3150000	0	0	0	0	0	0
<b>Isel House</b>											
<b>Income</b>	Isel House Lease	0	(205)	(210)	(215)	(220)	(226)	(231)	(238)	(244)	(250)
<b>Base Expenditure</b>	Insurance	5,114	5,114	5,114	5,114	5,114	5,114	5,114	5,114	5,114	5,114
<b>Unprogrammed Expenditure</b>	Property Mtce: Minor Assets	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000
	Building maintenance	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
<b>Capital External Expenditure</b>	Seismic evaluation/ strengt	20,000	0	0	0	0	0	0	0	0	0
<b>Melrose House</b>											
<b>Income</b>	Melrose House Rent	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)	(200)
<b>Base Expenditure</b>	Fire Safety BWoF	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
	Insurance	6,947	6,947	6,947	6,947	6,947	6,947	6,947	6,947	6,947	6,947
<b>Unprogrammed Expenditure</b>	Property Mtce: Minor Assets	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
<b>Programmed Expenditure</b>	Property Mtce: Programmed M	1,000	7,000	1,000	1,000	1,000	1,000	1,000	56,000	1,000	1,000
<b>Capital External Expenditure</b>	Renewal: structures	0	0	0	0	15,000	0	0	0	0	0
	Seismic Strengthening	0	10,000	0	0	0	0	0	0	0	0





Income/Expenditure Type	Code Description	12/13 Budget \$	13/14 Est \$	14/15 Est \$	15/16 Est \$	16/17 Est \$	17/18 Est \$	18/19 Est \$	19/20 Est \$	20/21 Est \$	21/22 Est \$
<b>Broadgreen House</b>											
<b>Base Expenditure</b>	Telephones	2,000	0	0	0	0	0	0	0	0	0
	Electricity	6,300	6,300	6,300	6,300	6,300	6,300	6,300	6,300	6,300	6,300
	Water by Meter	500	500	500	500	500	500	500	500	500	500
	Insurance	5,084	5,084	5,084	5,084	5,084	5,084	5,084	5,084	5,084	5,084
	Security	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
<b>Unprogrammed Expenditure</b>	Property Mtce: Minor Assets	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000
<b>Programmed Expenditure</b>	Property Mtce: Programmed M	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000
<b>Capital External Expenditure</b>	Renewal:Structures	0	0	0	5,000	0	0	0	0	0	0
<b>Founders Park</b>											
<b>Income</b>	Book Fair Proceeds	(95,000)	(95,000)	(95,000)	(95,000)	(95,000)	(95,000)	(95,000)	(95,000)	(95,000)	(95,000)
	Donations	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)	(500)
	Rent: Shop Leases	(85,000)	(85,000)	(85,000)	(85,000)	(85,000)	(85,000)	(85,000)	(85,000)	(85,000)	(85,000)
	Rent: Caretakers House	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)	(13,000)
	Venue Hire Fees	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)	(30,000)
	Public Events Hire Fees	(15,000)	(15,000)	(15,000)	(15,000)	(15,000)	(15,000)	(15,000)	(15,000)	(15,000)	(15,000)
	Conferences Hire Fees	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)	(1,500)
	Admission Charges	(42,000)	(42,000)	(42,000)	(42,000)	(42,000)	(42,000)	(42,000)	(42,000)	(42,000)	(42,000)
	Sundry Income	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)	(1,000)
	Shop Sales	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)	(20,000)
	Cost of Sales: Shop Purchas	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000
	Cost of Sales: Book Fair Ex	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000
	Recoveries: Water	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)
	Recoveries: Sundry	(4,000)	(4,000)	(4,000)	(4,000)	(4,000)	(4,000)	(4,000)	(4,000)	(4,000)	(4,000)
	Recoveries: Electricity/Pho	(33,000)	(33,000)	(33,000)	(33,000)	(33,000)	(33,000)	(33,000)	(33,000)	(33,000)	(33,000)



Income/Expenditure Type	Code Description	12/13 Budget \$	13/14 Est \$	14/15 Est \$	15/16 Est \$	16/17 Est \$	17/18 Est \$	18/19 Est \$	19/20 Est \$	20/21 Est \$	21/22 Est \$
<b>Base Expenditure</b>	Property Maintenance	40,800	40,800	40,800	40,800	40,800	40,800	40,800	40,800	40,800	40,800
	Ground Mtce Contract	35,700	35,700	35,700	35,700	35,700	35,700	35,700	35,700	35,700	35,700
	Volunteer Expenses	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500
	Telephones	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000
	Electricity	42,000	42,000	42,000	42,000	42,000	42,000	42,000	42,000	42,000	42,000
	Water by Meter	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000	9,000
	Rubbish Removal	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000
	Property Main: WOF	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000
	Provide Building Cleaning	18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000
	Insurance	27,558	27,558	27,558	27,558	27,558	27,558	27,558	27,558	27,558	27,558
	Provide: Marketing & Promot	16,320	16,320	16,320	16,320	16,320	16,320	16,320	20,000	20,000	20,000
	Security	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000
	Commission Paid	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
	General Operating Expense	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500	3,500
<b>Unprogrammed Expenditure</b>	Valuations / Surveys	5,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
	Granary Upgrade	7,000	0	0	0	0	0	0	0	0	0
	Building Maintenance	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000
<b>Programmed Expenditure</b>	Event and Hall Hire Expense	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
	Development Fund Expenditur	39,900	37,500	37,500	37,500	37,500	37,500	37,500	37,500	37,500	37,500
	Programmed Maintenance	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000
	Provide: Sundry Operating E	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
	Displays	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
<b>Capital External Expenditure</b>	Motor Vehicle	0	0	0	0	20,000	0	0	0	0	0
	Renewal:programmed renewal	10,000	10,000	10,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000
	Seismic eval/strengthening	5,000	5,000	5,000	0	0	0	0	0	0	0



Income/Expenditure Type	Code Description	12/13 Budget \$	13/14 Est \$	14/15 Est \$	15/16 Est \$	16/17 Est \$	17/18 Est \$	18/19 Est \$	19/20 Est \$	20/21 Est \$	21/22 Est \$
<b>Historic Cemeteries</b>											
<b>Income</b>	Fees: Ashes Services	(1,900)	(1,900)	(1,900)	(1,900)	(1,900)	(1,900)	(1,900)	(1,900)	(1,900)	(1,900)
	Fees: Burial Services	(5,000)	(5,000)	(5,000)	(5,000)	(5,000)	(5,000)	(5,000)	(5,000)	(5,000)	(5,000)
	Sundry Income	(600)	(600)	(600)	(600)	(600)	(600)	(600)	(600)	(600)	(600)
	Sale of Ashes Plots	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)	(3,500)
	Sale of Burial Plots	(8,000)	(8,000)	(8,000)	(8,000)	(8,000)	(8,000)	(8,000)	(8,000)	(8,000)	(8,000)
<b>Base Expenditure</b>	Property Mtce: Contract	27,810	27,810	27,810	27,810	27,810	27,810	27,810	27,810	27,810	27,810
	Electricity	400	400	400	400	400	400	400	400	400	400
	Water by Meter	212	212	212	212	212	212	212	212	212	212
	Insurance	25	25	25	25	25	25	25	25	25	25
	Security Services	3,300	3,300	3,300	3,300	3,300	3,300	3,300	3,300	3,300	3,300
<b>Unprogrammed Expenditure</b>	Unprogrammed Maintenance	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500
<b>Programmed Expenditure</b>	Property Mtce: Programmed M	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000
<b>Capital External Expenditure</b>	Renewals: Furniture	1,800	1,800	1,800	1,800	1,800	1,800	1,800	1,800	1,800	1,800
	Renewals: Accessways/Car pa	30,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
	Capital: Ash Beams	0	12,000	12,000	0	0	0	0	0	12,000	12,000
	Capital: Burial Beams	0	10,000	0	0	0	0	10,000	0	0	0
	Capital: Natural Burial Are	2,150	0	0	0	0	0	0	0	0	0
<b>Heritage Incentives</b>											
<b>Unprogrammed Expenditure</b>	Resource Consents Discounts	4,451	4,451	4,451	4,451	4,451	4,451	4,451	4,451	4,451	4,451
<b>Programmed Expenditure</b>	Rates Remissions	63,465	63,465	63,465	63,465	63,465	63,465	63,465	63,465	63,465	63,465
	Contestable Fund	61,000	61,000	61,000	61,000	61,000	61,000	61,000	61,000	61,000	61,000





**Nelson City Council**

te kaunihera o whakatū

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