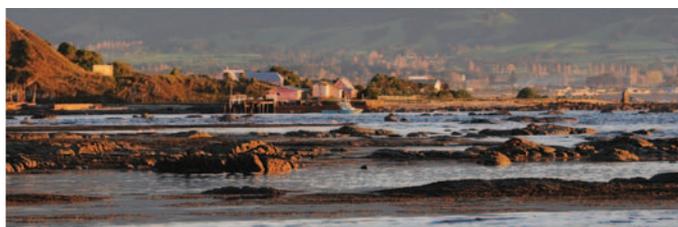




NEW ZEALAND  
HISTORIC PLACES TRUST  
POUHERE TAONGA



Statement of Intent 2009-2012  
Panui Whāinga

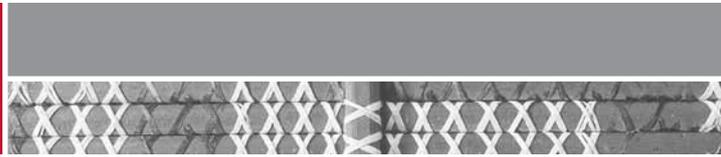
Photo credits:

Fyffe House *Wai o Puka*, Kaikoura, a property cared for by the NZHPT. *Images:* Grant Sheehan.

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## FROM THE CHAIRS OF THE NZHPT BOARD AND MĀORI HERITAGE COUNCIL

New Zealand's landscape is rich in historic places that are inseparable from our sense of place, identity and belonging. These places of significance to our many peoples help us to remember, to learn, and to share our stories with others. They provide inspiration for artistic creativity, a foundation for tourism and economic development, a welcome for travellers returning home, and are symbols of who we are as New Zealanders.

For more than 50 years the New Zealand Historic Places Trust (NZHPT) has served as advocate for, and guardian of, the nation's significant heritage places.

It is charged by Parliament with identifying, recording and caring for the nation's significant ancestral sites and buildings, and ensuring that these are passed on to future generations.

In doing this, it works with thousands of New Zealanders including its 25,000 members, its branch committees and many other agencies, nationally and locally. It seeks to empower others to respect, care for, and protect their own special places through creative, intelligent and prudent use of the range of functions entrusted to us. Our collective work on registration, statutory processes, advocacy, education and the interpretation of the 48 heritage properties the NZHPT administers ensures our heritage can be valued by a larger number of New Zealanders.

In recent years changes in funding and staffing, and the changes in governance and management that followed the external review of the organisation in 2005, have seen the development of an organisation that is now well positioned to work within the wider regulatory framework for heritage conservation.

There are many challenges to be overcome in the three years covered by this Statement of Intent. In spite of increases in both government and self-generated revenue over the past three years, the maintenance of NZHPT's heritage properties is not yet financially sustainable.

The NZHPT will face greater financial pressure as traditional sources of donor and grant funding reduce their annual spend, and the effects of sustained fiscal pressure on government are felt. There will be increased demands to demonstrate value for money to all its stakeholders.

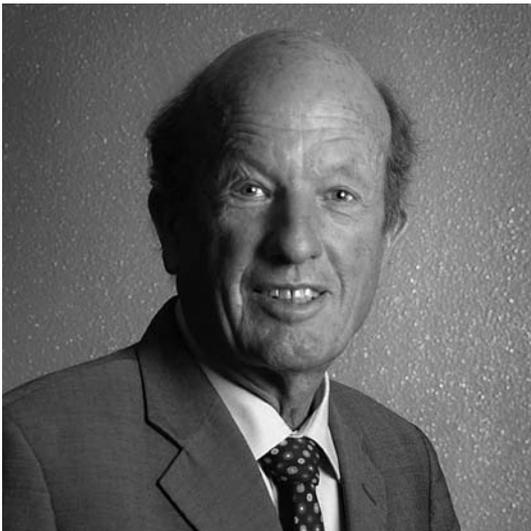
The NZHPT will be expected to improve the efficiency of its regulatory activities and, at the same time, continue to be a reliable source of advice and an advocate for significant heritage at risk.

Continued improvements are possible. We will continue to work with local government to improve the efficiency of the regulatory framework and seek creative ways of incentivising historic heritage conservation. We will work to maintain the current level of self-generated revenue. We also observe that it is government policy to undertake a review of the *Historic Places*

*Act 1993*. The present legislation is widely acknowledged to be relatively weak compared to other OECD jurisdictions.

During the past year, the inability to use the Act to protect the Greymouth Main School War Memorial gates was a clear example of this.

We hope that one outcome of the review will be a stronger organisation with improved abilities to ensure that considered decisions and equitable interventions are able to be made to ensure the conservation of our significant historic heritage places.



A handwritten signature in black ink, appearing to read 'John Acland' in a cursive script.

**John Acland**

Chair NZHPT Board

Tumuaki a te Poari Te Pouhere Taonga

Date: 26 May 2009



A handwritten signature in black ink, appearing to read 'Tumu te Heuheu' in a cursive script.

**Tumu te Heuheu DCNZM**

Chair Māori Heritage Council

Tiamana o te Kaunihera Taonga Tuku Iho Māori

Date: 26 May 2009



## OUTCOMES, CONTEXT AND STRATEGIES

### 1.1 OVERVIEW

New Zealanders are placing increasing importance on their historic heritage and the places that symbolise for most of us that we belong here and nowhere else in the world.

This Statement of Intent (SOI) reflects that view, and also shows our understanding of the environment in which the NZHPT will operate over the next three years and how we plan to respond to it.

The constrained financial environment is likely to continue throughout a large part of that period. The response includes a particular focus on developing NZHPT properties and sharing their stories through interpretation, as well as helping New Zealanders find a way to protect the places that are special to them and to see them continue to have a value within their communities through ongoing use.

This SOI is also the result of a detailed re-examination of the outcomes sought and their relationship with the NZHPT's outputs to ensure they deliver best value for money. It sets out new strategic priorities, the measures against which our success will be determined, and the key objectives for the 2009/10 financial year.

The approach proposed is consistent with the NZHPT's statutory functions, regulatory and advocacy effort designed to facilitate and encourage private sector reinvestment in the conservation and adaptive reuse of heritage places and buildings.

Part 1 of this SOI describes the benefits that the NZHPT aims to deliver to all New Zealanders and how we will measure these. It describes the environmental, legislative and organisational context in which we must work to achieve these outcomes, and sets out the strategies that the Board considers will best deliver the defined outcomes within this context.

Part 2 comprises the Statement of Service Performance which sets out the specific outputs and targets that we intend to deliver over the next three years. Part 3 describes the cost of delivering these outputs and the current and projected financial position of the organisation.

## 1.2 GOVERNMENT OUTCOMES FOR CULTURE AND HERITAGE

### Culture and Heritage Sector Outcomes

The Government, through the Ministry for Culture and Heritage, has defined a series of medium and long term outcomes for the sector. The NZHPT, as the lead historic heritage agency, contributes strongly to the delivery of these outcomes.

#### Medium term

- Increased visibility and accessibility of culture and cultural activities
- Well governed, efficient and sustainable government funded organisations.

#### Long term

- New Zealanders valuing access and opportunities to participate in cultural experiences
- A sector that is diverse, sustainable and contributing economically and socially
- An increased presence and profile of culture in New Zealand that also realises the potential of Māori.

## 1.3 NZHPT HERITAGE OUTCOMES AND MEASURES

The outcome NZHPT seeks to achieve is to enable present and future generations of New Zealanders to experience and enjoy a sense of place, identity and belonging.

We do this through ensuring that those places that have significant associations with our culture and heritage are identified, their stories are told, and that they survive to be appreciated.

We cannot do this alone and the vision of the NZHPT Board is that our work will encourage New Zealanders to value, respect and preserve their heritage for the benefit of present and future generations.

### Intermediate Outcomes

Heritage Identification	Heritage Survival	Heritage Appreciation
Places that contribute to New Zealand’s culture and heritage are identified and their stories recorded.	Places that are identified as significant to New Zealand’s culture and heritage survive.	New Zealanders appreciate those places that contribute to their sense of place, identity and belonging.

## Measuring our Progress

Our progress towards achieving the outcome and intermediate outcomes will be measured by a number of indicators. These are directly linked to and supported by, the initiatives, activities and their outputs set out in Part 2 of this Statement of Intent.

	Heritage Identification	Heritage Survival	Heritage Appreciation
Impact Indicators	I.1 An increased proportion of places that establish significant connections to our culture and heritage are identified and, where appropriate, registered.	S.1 Survival rates for significant heritage places in both public and private ownership are improved.	A.1 Places managed by the NZHPT are increasingly accessed by domestic and international visitors and contribute to economic development and cultural tourism.
	I.2 Accessibility to and usefulness of information about the cultural significance of heritage places is improved.	S.2 Heritage conservation provisions in planning documents result in improved survival rates.	A.2 Increasing numbers of New Zealanders understand and value the stories of our heritage places.
	I.3 Recovery of heritage information is improved.	S.3 An increased number of heritage places managed by the NZHPT demonstrate best practice in conservation and interpretation.	A.3 Increasing numbers of New Zealanders understand the value of heritage management today to future generations.

## 1.4 OUR STATUTORY ROLE

The role of the NZHPT, as defined by the *Historic Places Act 1993*, is “to promote the identification, protection, preservation and conservation of the historical and cultural heritage of New Zealand”. Over the past 50 years it has become New Zealand’s leading national historic heritage agency and is seen by the public as the guardian of New Zealand’s national historic heritage.

While the powers and functions of the NZHPT are established within the *Historic Places Act*, the organisation is governed and managed as an autonomous Crown

Entity under the *Crown Entities Act 2004*. The primary source of funding for the organisation is the New Zealand Government through Vote Arts, Culture and Heritage.

## 1.5 FUNCTIONS AND ACTIVITIES

The NZHPT provides national leadership for the identification and protection of our historic heritage and delivers for the Crown those statutory requirements that it is charged with under the Act. These responsibilities can be grouped into four classes, as follows:

- (1) Mandatory responsibilities under the Act
  - Administering the archaeological authority provisions (Part 1)
  - Maintaining the national Register of historic places, historic areas, wāhi tapu and wāhi tapu areas (Part 2).
- (2) Responsibilities assigned by the Government
  - Administering and allocating the National Heritage Preservation Incentive Fund
  - Assessing and making recommendations for the conservation of historic heritage prior to the disposal of Crown land.
- (3) Non-discretionary commitments
  - Promoting the protection of Māori heritage
  - Managing a portfolio of nationally significant heritage properties
- (4) Discretionary responsibilities to recognise, protect and promote heritage
  - Acting in accordance with heritage covenants with private owners
  - Monitoring compliance with archaeological authorities, heritage covenants, interim registration and heritage orders
  - Advocating heritage protection where the NZHPT's involvement is obligatory
  - Responding to enquiries.

## 1.6 ORGANISATIONAL STRUCTURE

The NZHPT is governed by a Board comprising nine members, six of whom are appointed by Government and three of whom are elected by the membership of the organisation every three years.

The Board is responsible for the strategic direction of the organisation but also has regard to government priorities and desired outcomes.

The NZHPT also incorporates the Māori Heritage Council. The Council has eight members, four of whom must also be Board Members. Seven Council Members are appointed by Government, the eighth member is appointed by the NZHPT Board

from amongst the other elected or appointed NZHPT Board members. The Council has specific statutory functions under the Historic Places Act for the promotion and conservation of many aspects of Māori heritage. While not in a governance role, the Council works very closely with the Board, often holding joint meetings to ensure that the work of the organisation is strategically aligned with the responsibilities and preferences of both bodies.

Management of the organisation is delivered through a decentralised organisational structure as follows:

- The national office in Wellington provides national service and support functions
- The NZHPT Māori Heritage team is established throughout the NZHPT's management and organisational structure
- A National Heritage Destinations Group manages 48 properties, of which 17 are staffed
- There are regional offices in Auckland, Wellington and Christchurch and area offices in Kerikeri, Tauranga and Dunedin
- The NZHPT also has over 25,000 members and 21 active branch committees throughout New Zealand elected by the members.

The NZHPT also works in close co-operation with other stakeholders, including communities,

iwi, hapū, whānau, individuals and agencies nationally and locally.

### Accountability

Under the *Crown Entities Act 2004*, Board members must comply with the Board's collective duties, their individual duties as members and any directions made by the responsible Minister. The HPA s.39(2) states that the Minister must not give a direction to the NZHPT in relation to heritage matters.

The NZHPT must report annually to Parliament in its performance against its SOI. In addition the NZHPT provides six monthly reports to its Minister on progress towards achieving performance targets. The NZHPT's Chair and the responsible Minister sign a Memorandum of Understanding each year specifying performance, reporting and relationship expectations.

## 1.7 EXPECTATIONS AND CHALLENGES 2009-2012

Over the past 10 years the NZHPT has changed from being a largely volunteer based organisation, to become a professionally staffed Crown Entity.

As part of this transition, the NZHPT was subject to an Organisational Capability Review in 2005. It has since implemented the recommendations made in that review. These included significant improvements to governance and management policies and systems, infrastructure, staffing and funding.

### The Current Context

**Increasing value** – Our historic heritage is already recognised as being of great value to New Zealanders and particularly to Māori. Unlike many such public values however, increasing recognition of its social and economic benefits, increasing awareness of its importance to us as individuals, families

and communities in providing a sense of place, identity and belonging, combined with a growing sense of nationhood, mean that our historic heritage is likely to be of even greater value to future generations.

**Economic pressures** – The current economic situation is expected to have a number of effects on the organisation and its work. There will be:

- Increasing constraints on both Government and private sources of funding, requiring greater efficiencies and additional requirements to demonstrate value for money to all who fund the NZHPT
- Pressure to reduce regulatory barriers to investment and to make those processes more efficient

- A mix of impacts on the survival and appreciation of heritage places. While it can be expected that, as land values decline, there will be less development pressure placing heritage at risk, there is also likely to be less reinvestment in heritage buildings and more pressure on the properties administered by the NZHPT as New Zealanders tend to visit their own country rather than travelling abroad.

### Stakeholder Expectations

Stakeholders' expectations of the NZHPT, as the national heritage agency, continue to increase both in terms of their diversity and their total demand.

- Demand from funders to demonstrate value for money
- Pressure from investors and property owners to make regulatory processes faster and more efficient
- Increasing importance of historic heritage for all New Zealanders in defining a distinct national identity that is recognised internationally
- Increasing concern from Māori communities to be more active in the protection and management of their heritage and increased expectations to be consulted and assisted
- Increased interest in the heritage of other ethnic groups within New Zealand's culturally diverse community
- Growing community expectations that the NZHPT will play a stronger heritage advocacy role that leads to greater heritage protection in resource management processes
- New Zealanders, overseas visitors and the tourism industry expect to find heritage places managed by the NZHPT presented and interpreted to international standards.

### Challenges

The NZHPT is acutely aware of the significant challenges it faces. These include:

- Continuing to deliver heritage outcomes of a high standard within the climate of uncertainty and restraint associated with the review of the *Historic Places Act 1993*, and recessionary economic conditions forecast to continue throughout the planning period
- Achieving and maintaining financial sustainability for the core functions of the organisation
- Prioritising the allocation of limited resources to those heritage places that are most significant and most at risk
- Funding the increasing gap between the conservation and tourism demands for the maintenance, development and interpretation of 48 NZHPT properties and available resources
- Creating a heightened awareness amongst the wider public of the value and relevance of heritage
- Managing the expectations of a diverse range of stakeholders
- Improving heritage survival rates through improving the regulatory environment in ways that incentivise private owners to retain and conserve significant heritage places
- Meeting the expectations of Māori to protect and support the conservation of Māori heritage
- Managing the risks associated with participating in legal processes while carrying out the organisation's heritage advocacy and protection functions
- Improving the identification of significant heritage to ensure that the NZHPT continues to be an authoritative source of information about significant heritage places

- Recovering significant archaeological information being lost through increasing rates of coastal erosion.

### Proposed Heritage Legislation Changes

Government has indicated its intention to review the *Historic Places Act 1993* and it is expected that this process will require the application of significant management resources during the term of this Statement of Intent. It is also possible that changes to the legislation will affect the delivery of some outputs over this period.

### Trends in Related Legislation

The *Local Government Act 2002* requires regional councils and territorial authorities to facilitate a process to identify the cultural outcomes sought by their communities and to adopt long-term council community plans that set out how to achieve the outcomes identified. Through this process, in which

the NZHPT participates, heritage outcomes are assuming greater regional and local prominence.

The *Resource Management Amendment Act 2003* (RMA) established that the protection of historic heritage from inappropriate subdivision, use and development should be recognised and provided for as a matter of national importance. Although the full impact of this measure is yet to be seen, it is expected to increase the weight given to historic heritage in policies, plans and consent processes. Significant input into improving heritage provisions in second generation District and Regional Plans is required. In addition, amendments to streamline and simplify the RMA are underway which will potentially affect heritage protection mechanisms.

Under the *Crown Entities Act 2004* the NZHPT is defined as an autonomous Crown entity. Increased demands have been placed on the NZHPT's governance, accountability, and performance measurement as a consequence.

## 1.8 STRATEGIC PRIORITIES 2009-2012

The following strategic priorities have been determined by the Board as being necessary to achieve the NZHPT's outcomes in light of the emerging issues and strategic context of the organisation.

### Telling the stories of our places

Historic places are identified as significant because of their contribution to, or association with, New Zealand's culture and heritage. Their value is drawn from the extent to which the stories associated with them convey a sense of identity, place and belonging to New Zealanders. Telling these stories is critical to achieving the intermediate outcomes.

The consequences of this priority are that:

- The identification, protection and promotion of other places must always be prioritised and explained by the significance of their stories to our culture and heritage, and the extent to which they convey a sense of identity, place and belonging to New Zealanders as individuals and communities, whānau, hapū and iwi

- A higher proportion of the resources of the organisation will be devoted to making the stories of our heritage places accessible to more people
- The places that the NZHPT manages should demonstrate best practice in telling the stories of our heritage places
- The NZHPT website and other communication channels will place greater emphasis on the stories of places.

### Achieving results through partnerships

The NZHPT often lacks the authority and, in some cases, the resources to deliver all of the heritage outcomes sought by the community. It is our experience that working in partnership can achieve far greater contributions to heritage outcomes through combined efforts.

To achieve our heritage management objectives, we must work in partnership with those whose heritage it is and those who can assist in its long-term conservation, be they property owners, iwi, hapū and whānau, universities, network utility operators, developers, territorial local authorities, central government or volunteers.

The consequence of this for our work programme is that:

- All programmes of work will identify and seek to engage with appropriate partners, including iwi and hapū, territorial local authorities, central government, property owners and NZHPT volunteers.

### Enhancing the economic viability of heritage places

More of our significant heritage buildings and places will survive to be appreciated by future generations if they continue to perform

valued functions. This, however, presents a challenge as the heritage values associated with places in private ownership often demonstrate many attributes of public good and market failure.

Where, for example, land values are rising and the floor area of a heritage building or the undeveloped nature of a rural heritage site means it is no longer able to generate a competitive rate of return, the economic incentives facing the owner may suggest demolition and rebuilding (or building in the case of rural land). In some cases, heritage value will be able to be captured by the owner, but in many cases these values will not be capable of generating a return sufficient to avoid redevelopment and the total loss of heritage values.

This market failure often leads to under investment in heritage conservation and ultimately the loss of heritage of greater value to the wider community.

The forms of intervention designed to address these issues have traditionally attempted to reverse the market failure by privatising the costs and socialising the benefits. When used in isolation, such regulatory intervention may become inequitable.

In some cases, the regulatory environment itself may incentivise the loss of heritage particularly where land values are declining. An example is the case where there is a requirement to retrospectively upgrade a building for building code compliance, triggered by the need to obtain a building consent for an otherwise minor repair job.

This may lead to under investment in maintenance and ultimately demolition by neglect.

The regulatory environment therefore has a great deal of influence in incentivising or disincentivising heritage survival.

The consequences of this priority for our work programme are that:

- Submissions and professional education programmes will encourage the development of a regulatory environment that facilitates adaptive reuse, compensates for regulation, defers code compliance until reinvestment is viable and generally incentivises retention
- The NZHPT will actively showcase success stories and promote best practice regulation.

### Achieving excellence through prioritisation

The demand for our services consistently exceeds our ability to supply. It is a given that the NZHPT will seek to increase revenue and cut costs to balance the budget where necessary, however choices will need to be made.

Rather than spread available funding across all of our properties and functions however, a key strategic approach will be to deliver the

best value for money by being selective about the activities and properties on which we will focus our efforts.

The consequence of this priority for our work programme is that activities undertaken by the NZHPT will be prioritised and managed at all levels of the organisation by applying the following principles:

**Risk** – The degree of risk of loss of significant heritage values

**Alignment** – The extent to which the activity is aligned to the NZHPT outcomes and the four strategic priorities

**Impact** – The extent to which the activity may positively enhance heritage outcomes across the wider community

**Significance** – The significance of the place in terms of its ability to illustrate an association with some aspect of our heritage, culture and identity

**Efficiency** – The ratio between the amount of work and the size of the impact on the identification, survival or appreciation of heritage.

## 1.9 ORGANISATIONAL HEALTH AND CAPABILITY

Achieving the organisation's outcomes and outputs requires our systems, people, and financial resources to be appropriately matched. Specific objectives for the planning period are to ensure:

- Financial sustainability is achieved
- Māori heritage and its relationship to iwi, hapū and whānau is recognised as integral to the delivery of all the NZHPT's outcomes
- Public awareness and perception of the role and functions of the NZHPT is improved
- Service delivery and property management activities are prioritised
- Partnerships to promote the conservation of historic heritage are created and leveraged
- Systems and processes are maintained and staff are supported in their work
- Implementation of improved measurement of intermediate outcomes.

The NZHPT will continue its annual workplace audit programme and reaffirms its commitment to the principles of equal employment opportunity.



## STATEMENT OF SERVICE PERFORMANCE 2009-2012

### NZHPT KEY PRIORITY OUTPUTS 2009-2012

In 2008 the NZHPT undertook a fundamental review and redefinition of the way in which it defines and measures the benefits it provides to its stakeholders.

The redefined statement of benefits (known as outcomes and intermediate outcomes) reflect why we exist. Statements of Outcome are defined from the perspective of the value that we add to our stakeholders, particularly those who fund our work. Intermediate Outcomes describe more specifically what we will do to achieve the primary outcome. They encompass our statutory obligations without pretending to rely upon them.

Baselines (known as impact indicators) have been derived to measure our success in

delivering these Intermediate Outcomes.

They focus on value rather than activity, and output rather than input. Each of the three Intermediate Outcomes identified in *Part One: Heritage Identification, Heritage Survival, and Heritage Appreciation*, has three directly related impact indicators.

More specific measures of the goods and services that the organisation will deliver in support of each Intermediate Outcome (known as Output Measures) are set out as Output Classes in the section below.

### Summary of Anticipated Costs allocated to each Intermediate Outcome:

Intermediate Outcome	Operational Expenses \$000s	Project Expenses \$000s (funded from special funds received in previous year)	Total Operating Expenses \$000s	Capital Expenditure \$000s	Total Expenditure \$000s	% Total Expenditure
Heritage Identification	2,897	-	2,897	-	2,897	18%
Heritage Survival	6,493	-	6,493	300	6,793	42%
Heritage Appreciation	5,603	-	5,603	900	6,503	40%
<b>Total</b>	<b>14,993</b>	<b>-</b>	<b>14,993</b>	<b>1,200</b>	<b>16,193</b>	<b>100%</b>

## 2.1 OUTPUT CLASS: HERITAGE IDENTIFICATION

### **The Heritage Identification Intermediate Outcome is:**

*Places that contribute to New Zealand's culture and heritage are identified and their stories recorded.*

Identifying heritage places, sites and areas and recognising their heritage significance is a core statutory function for the NZHPT. Identification is an important first step in managing the finite heritage resource – knowing what exists and its associated

heritage values. This Intermediate Outcome and Output Class recognises both the importance of identifying the heritage resource and ensuring information and the stories related to a place, are recorded for present and future generations.

### **Impact Indicator I 1:**

**An increased proportion of places that establish significant connections to our culture and heritage are identified and, where appropriate, registered.**

*What are we trying to achieve?*

The NZHPT has been collecting New Zealand's heritage information since 1955 and, while we have information on many heritage places throughout the country, it is stored in a number of different databases and in hard files. Making this information accessible from a single entry point is one of the key outputs of this area. A linked central database will allow information on heritage to be easily stored and accessed and will help us prioritise our protection and registration activity.

Maintaining the NZHPT Register of historic places, historic areas, wāhi tapu and wāhi tapu areas is one of our statutory obligations. Around 5,500 such places and areas are registered, however an audit of the Register several years ago identified some registrations were not valid and need to be revisited. Although a significant amount of this work has been completed, the NZHPT as a priority aims to resolve the final outstanding deficient registrations. This work will help to maintain

the Register's reputation as an inventory of national significance.

Another important stream of work is our plan to undertake thematic studies, such as New Zealand's Modern Movement architecture. Not only will this help to address gaps in the information we have, it will also help to recognise heritage places of importance to New Zealand.

*How will we evaluate our success in this area?*

- New additions to the heritage places database (trend should decrease over time as more places are identified) [Establish baseline]
- New places of significance to Māori identified in heritage places database (trend decreases over time as more places are identified) [Establish baseline]
- The NZHPT Register is maintained and enhanced [refer I 1.2].

What Outputs will the NZHPT produce in this area?

Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
I 1.1 Improve access to identified heritage through the creation of a New Zealand heritage places database.	Design and build database, improve existing information and populate new database.	Enhance database through addition of data from NZHPT hard file records.	Populate database with data held by other agencies and organisations e.g. local councils.
I 1.2 Maintain the national Register ( <i>Statutory process under Part II of the Historic Places Act 1993</i> ).	Make 25 new additions (historic places, historic areas, wāhi tapu and wāhi tapu areas) to the Register including 10 of significance to Māori, review as necessary any existing registrations [estimate 19], and update location information as required [estimate 125].	→	→
	Resolve 110 of remaining 539 deficient registrations.	Resolve 111 of the remaining 429 deficient registrations.	Resolve 106 of the remaining 318 deficient registrations.
I 1.3 Auckland City@Risk Regional Study.	Year II: Auckland CBD/ Onehunga identification of 'at risk' sites.	Year III: Evaluate project and establish best practice methodology including City@Risk Heritage Management Strategies (Survival).	Year IV: Public awareness/education (Appreciation).
I 1.4 Thematic studies.	Pacific Waka-Wairua Link: Stage 1.	Pacific Waka-Wairua Link: Stage 2.	Pacific Waka-Wairua Link: Stage 3.
	NZ Modern Movement Architecture (post war architecture of the 1950s).	→	→

## Impact Indicator I 2:

### Accessibility to and usefulness of information about the cultural significance of heritage places is improved.

#### What are we trying to achieve?

The NZHPT holds a vast amount of information about the cultural significance of heritage places including heritage buildings, structures, places of significance to Māori, historic sites, archaeological sites and historic areas.

As well as being useful to people working with heritage resources, it is important that this information is easily accessible. Information is collected through many of the organisation's statutory and other functions, in particular registration and the resulting reports from the archaeological authority process. This area of work will be made more readily available through web-based resources to increase the availability of this information to external organisations and the public.

#### How will we evaluate our success in this area?

- Increased use of Register Online [Target 38,000 unique visitor sessions per month] and Heritage Destinations [Target 137,500 page views per month] web pages
- Improved customer satisfaction as recorded by responses to website feedback form [Establish baseline]
- Increased number of Register Online entries meet specified standard and/or has an associated image [Refer I 2.1 and I 2.2].

#### What Outputs will the NZHPT produce in this area?

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
I 2.1 Register Images Project.	Stage II: Retrieval of images from NZHPT files.  Target: a further 1110 Register Online entries (so that 60% of the total) have an associated image.	  Target: a further 1110 Register Online entries (so that 80% of the total) have an associated image.	Stage III: Capturing images for remaining Register Entries.
I 2.2 Access to heritage information.	Maintain the Archaeological Digital Reports Library by adding new reports.		

... continued on the next page.

Key Initiatives and Activities ... cont.	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
	Add new heritage information to the Register Online within 2 weeks of registration decisions (Target: 100%).	→	→
	Add remainder of existing Register information to the Register Online (Target: 40% of Register Online entries meet defined information standard).	Continue with Register Information Upgrade Programme as resources allow.	→

**Impact Indicator I 3:**

**Recovery of heritage information is improved.**

*What are we trying to achieve?*

Heritage is a finite resource – once lost it is gone for good. Recording our heritage is a critical part of the identification process. Through photographic survey, architectural drawings and archaeological recording, we can gather heritage information prior to its destruction. Archaeological reports are accessible from the NZHPT Archaeological Digital Reports Library (refer I 2.1 above). Where resources allow, the NZHPT will help with rescue archaeology, recovering information from sites at threat of loss, through such events as development or coastal erosion.

As part of the archaeological authority process, any sites that are to be destroyed, damaged or modified must be appropriately recorded and documented.

Global climate change with its accompanying increase in sea levels poses great risk to heritage located on New Zealand’s coastal margin. Information gained through the authority process, along with predictive modeling and other research, will help NZHPT develop strategies for managing any effects that global climate change could have on our archaeological heritage.

*How will we evaluate our success in this area?*

- Decreased proportion of outstanding archaeological reports required as part of authorities (Biennial audit)
- Percentage of archaeological reports meeting standard [Establish baseline].

What Outputs will the NZHPT produce in this area?

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
I 3.1 Rescue excavation to recover information prior to loss.	Where situations arise, undertake a rescue excavation to recover information.	→	→
I 3.2 Effects on archaeological sites: climate change, economic and coastal development.	Develop monitoring and excavation strategies with external research providers to implement outcomes of the initial research into climate change, as part of the National Archaeological Research Framework.	Finalise monitoring and excavation strategies as part of the National Archaeological Research Framework.	Analyse results from regional surveys, develop recommendations for recovery of information and the protection of coastal sites, and publicise findings.
	Undertake regional research on a proactive basis to investigate strategic outcomes for sites affected by climate change or coastal development.	→	n/a
	Archaeological Site Predictive Modelling: Stage I: data capture.	Archaeological Site Predictive Modelling: Stage II: analysis of results.	n/a

## 2.2 OUTPUT CLASS: HERITAGE SURVIVAL

### **The Heritage Survival Intermediate Outcome is:**

*Places that are identified as significant to New Zealand's culture and heritage survive*

There are growing community expectations that significant heritage will survive allowing present and future generations to understand and appreciate these tangible links to our past and our identity. The NZHPT supports the need to ensure heritage places continue to be economically viable. We also work closely with land use regulators and owners to protect and conserve heritage values. The NZHPT is focused on protecting significant heritage through advocacy work, with RMA processes and the archaeological authority process protecting significant heritage wherever possible.

The National Heritage Preservation Incentive Fund, administered by the NZHPT, is a direct way the government can help with the

physical conservation of nationally important heritage places in private ownership.

In the long term, conservation of the 48 significant properties managed by the NZHPT means that, as an organisation, we must ensure that best practice conservation is demonstrated within limited resources.

The work undertaken under the Heritage Identification and Heritage Appreciation Intermediate Outcomes contributes directly to the survival of significant heritage. Improving awareness of the heritage significance of these places, and providing the owners with some of the tools to conserve them, will ultimately ensure that more of our heritage places survive.

### **Impact Indicator S 1:**

**Survival rates for significant heritage places in both public and private ownership are improved.**

*What are we trying to achieve?*

The survival of significant heritage depends on appropriate protection and incentive mechanisms, which ensure capacity exists to carry out conservation work. It also depends on owners who are willing to adapt heritage resources in heritage-appropriate ways. The NZHPT's advisory, advocacy and archaeological authority work, along with the heritage conservation information and training we provide, aim to achieve a higher proportion of heritage survival.

The NZHPT seeks to support whānau, hapū and iwi to manage and protect their heritage places, working directly with them on conservation and developing resources and

workshop programmes that build the capability of Māori communities to ensure the survival of their heritage places.

*How will we evaluate our success in this area?*

- Increased number of heritage sites protected as a result of NZHPT involvement [Establish baseline]
- Decreased number of historic place losses from the Register (Category I and II) [Establish baseline]
- Reduced number of demolition consents granted by territorial local authorities where NZHPT opposes demolition [Establish baseline].

What Outputs will the NZHPT produce in this area?

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
S 1.1 Working with iwi, hapū and whānau to assist in their capacity to maintain, conserve, and ensure the survival of their heritage places including built heritage, sites and rock art.	Work with selected iwi, hapū and whānau to assist in their capacity to maintain, conserve, and ensure the survival of their heritage places.  Includes the delivery of 10 Māori built heritage and rock art projects.		
S 1.2 Developing capability in Māori heritage/taonga conservation.	Develop resources and workshop programmes to support Māori built heritage traditional materials use capability in Māori communities.	Develop resources and workshop programmes to support Māori built heritage mātauranga (knowledge) of place capability in Māori communities.	Develop resources and workshop programmes on traditional material resource sustainability.
S 1.3 Develop best practice guidelines for heritage protection and conservation.	Prepare new guidelines for writing archaeological final reports, and technical heritage guidelines relating to the Building Code.	Prepare new guidelines for example: historic period archaeology, conservation plans for archaeological sites, heritage assessment, and successful retention and adaptive reuse of heritage buildings case studies.	Continue to prepare and promote guidelines.
S 1.4 Heritage Training for Professionals.	Develop programme(s) and resource material.	Continue to deliver heritage training events.	

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Key Initiatives and Activities ... <i>cont.</i>	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
	Deliver 50 heritage training events to professionals.		
	Investigate options for improving capability in heritage trades.	Implement heritage trades capability project.	
S 1.5 Administer the Archaeological Authority Process ( <i>Statutory process under Part I of the HPA</i> ).	Process archaeological authorities [Estimate 305] within statutory timeframes [Target 95%] including comprehensive archaeological and Māori values assessments [Estimate 30%], avoiding sites where possible [Target 20% avoidance], investigate reports of site damage and undertake compliance monitoring.		
S 1.6 NZHPT involvement in local authority consents.	Provide heritage conservation advice including section 94 approvals [Estimate 950] and submissions on RMA processes [Estimate 210].  [Target 60% of decisions are positive for heritage measured where the NZHPT's recommendations are accepted].		

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Key Initiatives and Activities ... <i>cont.</i>	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
S 1.7 NZHPT involvement in the disposal of Crown land.	Provide heritage assessments for land proposed for disposal by Crown agencies through land of potential interest system [Estimate 62] and the NZHPT notification process [Estimate 300] within agreed timeframes.  Percentage of assessments that contain comprehensive Māori values assessments [Target 33%].	→	→
S 1.8 National Heritage Preservation Incentive Fund.	Administer the National Heritage Preservation Incentive Fund in accordance with Minister-approved policy including allocating 100% of the Fund to worthwhile projects.	→	→
S 1.9 Other heritage conservation initiatives to improve heritage protection.	Negotiate heritage protection mechanisms (such as heritage covenants, archaeological site gazettal) and provide conservation advice to improve heritage survival.	→	→

**Impact Indicator S 2:**

**Heritage conservation provisions in planning documents result in improved survival rates.**

*What are we trying to achieve?*

The recognition of historic heritage as a matter of national importance has resulted in numerous initiatives, reviews, and plan changes at the local authority level. This impact indicator recognises that protection, and therefore survival, of heritage is often dependant on district planning mechanisms. The NZHPT is seeking improved heritage provisions in district plans and planning incentive mechanisms to encourage heritage survival. The NZHPT recently assessed

the heritage provisions of all district plans in New Zealand. The results of this assessment provide a basis on which the NZHPT can work with Councils to enable them to meet their obligations under the RMA and community expectations.

*How will we evaluate our success in this area?*

- Increased number of territorial local authorities meet NZHPT heritage management standards (biennial survey).

*What Outputs will the NZHPT produce in this area?*

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
S 2.1 Input on local, district and regional planning documents.	Work with selected territorial local authorities on improved heritage provisions in second generation plans.	→	→
	Provide input on other local, district and regional planning documents including long term council-community plans, iwi management plans, heritage strategies etc [Estimate 130 advice and 79 submissions].	→	→

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Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
S 2.2 Planning incentives to encourage heritage retention.	Promote incentives as well as regulatory measures involving planning mechanisms to encourage heritage survival.	Work with selected territorial local authorities to include incentives as well as regulatory measures involving planning mechanisms to encourage heritage survival.	→
S 2.3 National policy initiatives.	Provide advice/submissions on improved heritage provisions in national policy statements, national environmental standards and other national policy documents and legislative reviews [Estimate 15].	→	→

### Impact Indicator S 3:

**An increased number of heritage places managed by NZHPT demonstrate best practice in heritage conservation.**

#### *What are we trying to achieve?*

The NZHPT is the custodian of 48 heritage properties that are significant to New Zealand's heritage. Many of these are well-known and visited properties such as the Kerikeri Stone Store, Pompallier Mission at Russell, Alberton in Auckland, Te Porere Redoubt in Ruapehu District, Old St Paul's in Wellington, Timeball Station in Lyttelton, and Totara Estate near Oamaru. Collectively, the property portfolio is branded as 'Heritage Destinations', signalling an increased focus on visitation and accessibility by both New Zealanders and international tourists.

The management of these properties, including their significant collection of relevant chattels or objects of some 80,000 items, constitutes one of the largest heritage property portfolios in New Zealand. The NZHPT aims to conserve these places and their collections to the best conservation practice within its limited budget. For this reason, a comprehensive programme of repair and conservation work including the preparation of conservation plans for these places is underway.

*How will we evaluate our success in this area?*

- Percentage of properties managed in accordance with conservation plans or reserve management plans (Target = 18 properties or 37.5% of total properties managed by NZHPT)
- Percentage of properties maintained in accordance with the 50 year NZHPT Properties Maintenance Plan (Target = 8.4%)
- Percentage of properties managed in accordance with a property management plan (Target: 33%).

*What Outputs will the NZHPT produce in this area?*

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
S 3.1 Repair and maintenance of selected NZHPT properties.	Critical repairs and maintenance completed at 13 selected properties.	Critical repairs and maintenance completed at selected properties.	→
S 3.2 Conservation Plans for NZHPT Properties.	Conservation plans prepared for three properties.	→	→

## 2.3 OUTPUT CLASS: HERITAGE APPRECIATION

**The Heritage Appreciation Intermediate Outcome is:**  
*New Zealanders appreciate those places that contribute to their sense of place, identity and belonging.*

There is an increasing understanding and awareness of the role our heritage plays in shaping New Zealand’s distinct culture, providing each of us with a sense of place, and creating economic opportunity

through increased cultural tourism. It is also recognised that with this understanding comes a greater desire to conserve heritage places for present and future generations.

**Impact Indicator A 1:**  
**Places managed by the NZHPT are increasingly accessed by domestic and international visitors and contribute to economic development and cultural tourism.**

*What are we trying to achieve?*

The recent rebranding of the NZHPT property portfolio as ‘Heritage Destinations’ signals an increased focus on encouraging

New Zealanders and international tourists to visit these places. In showcasing 48 significant properties, the NZHPT engages visitors in an experience that increases their

understanding of New Zealand’s past, our cultural identity and, for New Zealanders, their place within it. The NZHPT is working to build cultural tourism initiatives in partnership with regional and national tourism operators and agencies to expand the wider visitor experience and to contribute to local and regional economic development.

*How will we evaluate our success in this area?*

- Maintain visitor numbers at NZHPT staffed properties [Target: 180,000 visitors as measured by the average over the last three years].

*What Outputs will the NZHPT produce in this area?*

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
A 1.1 Build cultural tourism relationships.	Further expand NZHPT links with local and national tourism networks.	→	→
A 1.2 Development and interpretation at our properties.	Improve visitor facilities and interpretation at four selected NZHPT properties.	Improve visitor facilities and interpretation at selected NZHPT properties.	→

**Impact Indicator A 2:**

**Increasing numbers of New Zealanders understand and value the stories of our heritage places.**

*What are we trying to achieve?*

Telling the stories of our heritage places helps visitors to understand our collective past, develops an appreciation of the value of these places and leads in turn to their conservation for the benefit of both present and future generations. Heritage education has an important part to play in achieving this. The NZHPT wants to ensure that the community and decision makers have accurate information on which to base decisions about the retention or loss of heritage. The work in this area will see heritage stories reach a wide audience across

the country, demographics and ethnicities via the quarterly magazine *Heritage New Zealand* and e-newsletter *Heritage This Month*, website, media features and releases, events and interpretation at NZHPT heritage destinations.

*How will we evaluate our success in this area?*

- Improved public awareness and understanding as shown by improvement in results from public survey (refer A 2.6)
- Average number of NZHPT members maintained [average 25,300 members]
- Increased promotion of heritage in the media [refer A 2.3].

*What Outputs will the NZHPT produce in this area?*

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
A 2.1 Fostering local community appreciation of and engagement in heritage conservation.	Promote <i>Tapuwae</i> – the Māori Heritage Council’s vision for Māori Heritage.	→	→
	Deliver 70 events to targeted audiences.	→	→
A 2.2 Provision of advice and information that contributes to understanding of heritage.	Provide advice and information to stakeholders that contributes to improved understanding of heritage.	→	→
A 2.3 Publish heritage stories.	Deliver heritage stories to the public and NZHPT membership via <i>Heritage New Zealand</i> quarterly magazine (audited circulation of 19,438), NZHPT website, media releases and feature articles (target 160), and circulation of the <i>Heritage This Month</i> e-newsletter to an average of 6,000 recipients.	Ongoing production of <i>Heritage New Zealand</i> and <i>Heritage This Month</i> .  Ongoing campaign of media releases.  Contributing articles to other selected publications.	→

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Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
A 2.4 Establishing and developing relationships with iwi, hapū and whānau to increase understanding of Māori heritage through interpretation at NZHPT heritage destinations.	Ensure Māori heritage appropriately emphasised in interpretation at selected NZHPT properties.	→	→
A 2.5 Engaging future generations with heritage.	Form relationships with education sector.	→	Develop a national education strategy including Māori heritage dimensions.
A 2.6 Establish public survey to measure awareness and understanding of heritage.	Develop survey and establish baseline.	Conduct survey annually.	Conduct survey annually.

### Impact Indicator A 3:

### Increasing numbers of New Zealanders understand the value of heritage management today for future generations

*What are we trying to achieve?*

Conserving heritage places that are likely to be of greater value to future generations, requires a broad acceptance by the community, of the need for heritage management strategies today.

*How will we evaluate our success in this area?*

- Increasing awareness of the value of heritage management as measured through public awareness survey (Target = 81% recognition of NZHPT and its role).

*What Outputs will the NZHPT produce in this area?*

Key Initiatives and Activities	Outputs 2009-10	Outputs 2010-11	Outputs 2011-12
A 3.1 Increase understanding of heritage management and its value.	Develop resources including those accessible online to assist understanding of heritage management.	Continue to develop print and web-based resources.	



## PROSPECTIVE FINANCIAL STATEMENTS 2009-2010

### 3.1 STATEMENT OF RESPONSIBILITY FOR THE STATEMENT OF PROPOSED SERVICE PERFORMANCE AND THE PROSPECTIVE FINANCIAL STATEMENTS 2009-2010

In accordance with FRS-42, Prospective Financial Statements, the Board and the management of the New Zealand Historic Places Trust hereby state that:

- The Board and the management of New Zealand Historic Places Trust have been responsible for the preparation of the Statement of Proposed Service Performance and prospective financial statements, including the appropriateness of the assumptions underlying them, and the judgments used in therein.
- The Statement of Proposed Service Performance and prospective financial statements will be updated in accordance with S139 of the *Crown Entities Act 2004* obligation to prepare a Statement of Intent at the start of each financial year.

**Mr John Acland**

Chairman

Date: 26 May 2009

**Mr Bruce Chapman**

Chief Executive

Date: 26 May 2009

## 3.2 FINANCIAL PLANNING ASSUMPTIONS

### 3.2.1 Overview:

The NZHPT's forecast total income for 2008/09 will be approximately \$14.8 million. This includes \$11.9 million from the Crown and \$2.8 million from the NZHPT's membership base, properties, grants and other income.

During the 2008/09 year it was a priority of the NZHPT to establish and commence delivery of capital maintenance programmes and prioritised service delivery levels within the limited resources available. While an increase in Crown baseline funding over the next two years, as agreed in Budget May 2008, will partially address the identified required amount to continue this prioritised work programme, there remains a significant shortfall. Alternative revenue streams will continue to be actively pursued during the 2009/10 year to try to reduce this gap.

The major assumptions that have been made in developing this Statement of Intent are:

- Crown funding for the NZHPT will remain as announced in Budget 2008
- While continuing to maintain delivery of core services in other output classes, there will be additional focus on delivering key projects at a selected number of properties only within the NZHPT portfolio
- Some properties currently managed by the NZHPT will deteriorate due to insufficient deferred maintenance funding available
- Revenue from membership fees will be slightly more in 2009/10 financial year due to the increase of fees in September 2008 but allowing for a reduction in total membership numbers
- Interest revenue will decrease due to the reduction in interest rates and a reduction in working capital available to invest short term
- The NZHPT will remain a going concern
- There will be no major changes to the functions of the NZHPT resulting from the legislation review currently underway
- Outcomes sought by Government remain consistent.

### 3.2.2 Government Funding

Government has confirmed the following funding for the NZHPT over the next three years:

	Estimated outturn 2008/09 \$000s	Prospective 2009/10 \$000s	Prospective 2010/11 \$000s	Prospective 2011/12 and outyears \$000s
Operating baseline	11,303	11,803	12,303	12,303
Incentive Fund	500	500	500	500
Crown Land disposal	185	185	185	185
<b>Total Operating</b>	<b>11,988</b>	<b>12,488</b>	<b>12,988</b>	<b>12,988</b>
Capital	500	-	-	-

### 3.2.3 Self-Generated Revenue

Approximately 19% of the NZHPT's total funding is currently self-generated (2008/09 estimated \$2.8 million). Sources include membership fees, property income, grants, interest and bequests.

While it is the NZHPT's intention to continue to pursue third party revenue options, it is not possible to accurately predict future targets, particularly for grant income, at this point. Planning therefore has been undertaken on the assumption of what can be delivered within agreed Crown funding and conservative third party revenue. Any additional grant funding has not been factored in as the corresponding expenditure for those projects will only be undertaken if the additional grant income is secured.

	Estimated outturn 2008/09 \$000s	Prospective 2009/10 \$000s	Prospective 2010/11 \$000s	Prospective 2011/12 \$000s
Membership	600	600	620	620
Magazine advertising and sales revenue	69	60	60	60
Merchandising	300	250	250	250
Property admissions and functions	800	800	830	830
Grants/Bequests	320	300	370	370
Interest	440	370	250	250
Sundry/Donations	300	132	132	132
Other sources	-	-	-	-
<b>Total</b>	<b>2,829</b>	<b>2,512</b>	<b>2,512</b>	<b>2,512</b>

### 3.2.4 Projected Expenditure

After allowing for a small increase in operating expenditure for inflation and salary increases across all outputs, it has been assumed that any additional expenditure incurred as a result of the increased Crown revenue in 2008/09 will be prioritised to continue the business improvement capability initiatives and within the heritage destinations.

The NZHPT has no ongoing capital funding guaranteed from Crown or secured from third party funding. Therefore the only capital projects during 2009/10 will be for the completion of projects commenced in 2008/09. They will be funded from Crown capital received in previous years (\$1,200,000).

Projected Expenditure by Output:

	Estimated outturn 2008/09 \$000s	Prospective 2009/10 \$000s	Prospective 2010/11 \$000s	Prospective 2011/12 \$000s
Heritage Identification	2,493	2,897	3,040	3,040
Heritage Survival	6,700	6,493	6,686	6,686
Heritage Appreciation	5,424	5,603	5,774	5,774
<b>Total Operating Expenditure</b>	<b>14,617</b>	<b>14,993</b>	<b>15,500</b>	<b>15,500</b>
<b>Capital Expenditure Crown funded</b>	<b>679</b>	<b>1,200</b>	<b>-</b>	<b>-</b>
<b>Total Expenditure</b>	<b>15,296</b>	<b>16,193</b>	<b>15,500</b>	<b>15,500</b>

### 3.3 PROSPECTIVE STATEMENT OF FINANCIAL PERFORMANCE

For the year ending 30 June 2010

	Actual 2008 \$000s	Estimated Outturn 2009 \$000s	Prospective 2010 \$000s
<b>Operating Revenue</b>			
Government funding	10,503	11,988	12,488
Grants	299	320	300
Property	886	1,100	1,050
Interest	455	440	370
Membership	664	669	660
Donations	150	224	81
Sundry	18	76	51
<b>Total Revenue</b>	<b>12,975</b>	<b>14,817</b>	<b>15,000</b>
<b>Operating Expenditure</b>			
Audit Fees – external audit	49	45	45
Administration	2,192	2,515	2,381
Bad and doubtful debts	-	-	-
Personnel	6,660	7,200	7,516
Property	1,105	1,787	1,755
Incentive fund	686	520	520
Rental costs on operating leases	129	129	129
Depreciation	183	337	387
Communications	380	774	723
Membership	596	500	629
Board fees	110	110	128
Travel and accommodation	857	700	780
<b>Total Expenditure</b>	<b>12,947</b>	<b>14,617</b>	<b>14,993</b>
<b>Operating surplus (deficit) for the year</b>	<b>28</b>	<b>200</b>	<b>7</b>

The accompanying accounting policies form an integral part of these prospective financial statements.

The operating surplus/(deficit) results partially from the timing of expenditure against income received in different years and which have been tagged as Special Funds in equity. The following table shows a breakdown of operating surplus/(deficit) between operations and tagged funds:

Reconciliation of operating surplus/(deficit) between operations and tagged special funds			
	Actual 2008 \$000s	Estimated 2009 \$000s	Prospective 2010 \$000s
Net surplus from operations	1	265	(118)
Net movement in branch committee operations	(18)	35	-
Net movement in Special Funds where expenditure is incurred in a different year from when the income was received	45	(100)	125
Net operating surplus/(deficit)	28	200	7

### 3.4 PROSPECTIVE STATEMENT OF COMPREHENSIVE INCOME

#### For the Year Ending 30 June 2010

	Actual 2008 \$000s	Estimated Outturn 2009 \$000s	Prospective 2010 \$000s
Net operating surplus/deficit for the year	28	200	7
<b>Other comprehensive income</b>			
Gains on land and buildings revaluation	-	6,000	-
Crown capital	2,000	500	-
Total other comprehensive income	2,000	6,500	-
<b>Total Comprehensive Income for the year</b>	<b>2,028</b>	<b>6,700</b>	<b>7</b>

The accompanying accounting policies form an integral part of these prospective financial statements.

## 3.5 PROSPECTIVE STATEMENT OF FINANCIAL POSITION

As at 30 June 2010

	Actual 2008 \$000s	Estimated Outturn 2009 \$000s	Prospective 2010 \$000s
<b>EQUITY</b>			
Accumulated funds	7,541	8,485	9,567
Crown capital fund	1,379	1,200	-
Branch accumulated funds	290	325	325
Specified funds and bequests	2,137	2,037	2,162
NZHPT property maintenance and development fund	95	95	95
Revaluation reserve	20,970	26,970	26,970
<b>Total Equity</b>	<b>32,412</b>	<b>39,112</b>	<b>39,119</b>
Equity is represented by:			
<b>CURRENT ASSETS</b>			
Cash and cash equivalents	6,362	6,548	5,742
Accounts receivable	109	100	100
Stock on hand	45	60	60
<b>Total Current Assets</b>	<b>6,516</b>	<b>6,708</b>	<b>5,902</b>
<b>NON-CURRENT ASSETS</b>			
Property, plant and equipment	28,360	34,799	35,727
Intangibles assets	441	344	229
<b>Total Non-Current Assets</b>	<b>28,801</b>	<b>35,143</b>	<b>35,956</b>
<b>Total Assets</b>	<b>35,317</b>	<b>41,851</b>	<b>41,858</b>
<b>CURRENT LIABILITIES</b>			
Accounts payable and accruals	1,308	1,300	1,300
Provision for Incentive Fund grants	1,000	1,000	1,000
Employee entitlements	508	350	350
GST payable	75	75	75
<b>Total current liabilities</b>	<b>2,891</b>	<b>2,725</b>	<b>2,725</b>
<b>NON-CURRENT LIABILITIES</b>			
	14	14	14
<b>Total Liabilities</b>	<b>2,905</b>	<b>2,739</b>	<b>2,739</b>
<b>NET ASSETS</b>	<b>32,412</b>	<b>39,112</b>	<b>39,119</b>



**Mr John Acland**

Chairman



**Mr Bruce Chapman**

Chief Executive

The accompanying accounting policies form an integral part of these prospective financial statements.

### 3.6 PROSPECTIVE STATEMENT OF MOVEMENTS IN EQUITY

For the year ended 30 June 2010

	Actual 2008 \$000s	Estimated Outturn 2009 \$000s	Prospective 2010 \$000s
<b>Opening Equity</b>	30,384	32,412	39,112
Operating surplus/(deficit) for the year to accumulated funds	1	265	(118)
Net movement in Branch Committee equity	(18)	35	-
Net movement in Special Funds for items recognised in Statement of Service Performance	45	(100)	125
<b>Surplus/(deficit) for the year</b>	<b>28</b>	<b>200</b>	<b>7</b>
Total recognised income and expense	30,412	32,612	39,119
Crown capital funding	2,000	500	-
Movement in revaluation reserve	-	6,000	-
<b>Closing Equity</b>	<b>32,412</b>	<b>39,112</b>	<b>39,119</b>

The accompanying accounting policies form an integral part of these prospective financial statements.

## 3.7 PROSPECTIVE STATEMENT OF CASH FLOWS

For the year ended 30 June 2010

	Actual 2008 \$000s	Estimated Outturn 2009 \$000s	Prospective 2010 \$000s
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>			
Cash was received from:			
Government funding	10,503	11,988	12,488
Grants	299	320	300
Other operating activities	1,654	2,054	1,842
Interest	395	449	370
	12,851	14,811	15,000
Cash was applied to			
Payment of suppliers	(5,870)	(7,088)	(7,816)
Payment to employees	(6,455)	(7,358)	(6,790)
Net Goods and Services Tax	34	-	-
	(12,291)	(14,446)	(14,606)
Net cash from operating activities	560	365	394
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>			
Cash was applied to:			
Purchase of fixed assets	(823)	(629)	(1,200)
Purchase Intangibles	(468)	(50)	-
Net cash from investing activities	(1,291)	(679)	(1,200)
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>			
Cash was received from:			
Crown capital	2,000	500	-
	2,000	500	-
Net increase / (decrease) in cash	1,269	186	(806)
Opening cash balance	5,093	6,362	6,548
Closing cash balance	6,362	6,548	5,742
Represented by			
Petty cash and imprest balances	7	7	7
Short term deposits	4,757	4,941	4,135
Specified fund and bequest deposits	1,598	1,600	1,600
	6,362	6,548	5,742

The accompanying accounting policies form an integral part of these prospective financial statements.

## 3.8 PROSPECTIVE STATEMENT OF ACCOUNTING POLICIES

### For the Year Ended 30 June 2010

#### Reporting Entity

The New Zealand Historic Places Trust Pouhere Taonga (NZHPT) is domiciled in New Zealand and is a statutory body established under section 4 of the *Historic Places Act 1980* and continued under section 38 of the *Historic Places Act 1993*, as amended by the *Crown Entities Act 2004*. The NZHPT became an Autonomous Crown Entity for the purposes of section 7 of the *Crown Entities Act 2004* effective from 25 January 2005. As such, the ultimate parent is the New Zealand Government.

The NZHPT's primary objective is to identify, protect and promote heritage in New Zealand (as enshrined in its Vision, Mission, and Values Statements, and Statement of Service Performance).

Accordingly, the NZHPT has designated itself as a Public Benefit Entity for the purposes of New Zealand Equivalents to International Financial Reporting Standards (NZ IFRS).

#### Basis of Preparation

##### *Statement of Compliance*

The prospective financial statements have been prepared in accordance with the requirements of *Public Finance Act 1989* and the *Crown Entities Act 2004*, which includes the requirements to comply with New Zealand generally accepted accounting practice (NZ GAAP).

The prospective financial statements comply with NZ IFRS, and other applicable Financial Reporting Standards, as appropriate for public benefit entities.

The prospective financial statements are prepared on the basis that the NZHPT continues to be a going concern.

The prospective financial operations of the NZHPT Branch Committees have been consolidated into these prospective financial statements.

##### *Measurement Base*

The prospective financial statements have been prepared on an historical cost basis, modified by the revaluation of certain property, plant and equipment. Heritage Chattels and Artefacts are by nature specialised and are managed by the NZHPT to be preserved in perpetuity as required by the *Historic Places Act 1993*. These items do not have a readily available tradable value and have been measured on an estimated value, and are not depreciated. The NZHPT is in the process of implementing a rolling valuation of significant Heritage Chattels and Artefacts to enable a fair value to be obtained where possible.

### *Functional and presentation currency*

The prospective financial statements are presented in New Zealand dollars and all numbers are rounded to the nearest thousand dollars (\$000). The functional currency of the NZHPT is New Zealand dollars.

*Standards, amendments and interpretations issued that are not yet effective and have not been early adopted.*

There are no standard, amendments and interpretations issued but not yet effective that have not been early adopted, and which are relevant to the NZHPT.

### **Significant Accounting Policies**

The prospective financial statements with the exception of cash flow information are being prepared using the accrual basis of accounting.

The following accounting policies that materially affect the measurement of prospective financial performance and prospective financial position have been applied:

### **Prospective Figures**

The prospective figures for 30 June 2010 are those approved by the Board at the beginning of the financial year. These figures have been prepared in accordance with NZ IFRS and are consistent with the accounting policies adopted by the Board for the preparation of the financial statements.

Actual results achieved for the period covered are likely to vary from the information presented and these variations may be material.

### **Revenue**

Revenue is measured at the fair value of consideration received or receivable.

**Revenue from the Crown:** The NZHPT is primarily funded through revenue received from the Crown, which is restricted in its use for the purpose of the NZHPT meeting its objectives as specified in this NZHPT Statement of Intent. Revenue from the Crown is recognised as revenue when earned and is reported in the financial period to which it relates. Crown funding received as a capital injection is accounted for in the prospective Statement of Movements in Equity.

**Other Grants:** Non-government grants are recognised as revenue when they become receivable unless there is an obligation to return the funds if conditions of the grant are not met. If there is such an obligation the grants are initially recorded as grants received in advance, and recognised as revenue when the conditions of the grant are satisfied.

**Membership Subscriptions:** Membership subscriptions are recognised in the period received.

**Interest:** Interest income is recognised using the effective interest method. Interest income on an impaired financial asset is recognised using the original effective interest rate.

**Donations and Bequests:** Donations and bequests received without restrictive conditions are treated as operating revenue on receipt in the Prospective Statement of Financial Performance. Those with restrictive conditions are treated as Other Revenue and transferred to Specified Funds and Bequests from Accumulated Funds. The net on each of these funds from interest earned and payments made is treated in the same manner.

**Rental income:** Lease receipts are recognised as revenue on a straight-line basis over the lease term.

**Sale of publications:** Sales of publications are recognised when the product is sold to the customer.

**Vested Assets:** Where a physical asset is gifted or acquired by the NZHPT for nil or nominal cost, the fair value of the asset is recognised as income. Such assets are recognised as income when control over the asset is obtained.

**Volunteer Services:** The operations of the NZHPT are reliant on services provided by volunteers. Volunteer services received are not recognised as revenue or expenditure by the NZHPT due to the difficulty of measuring their fair value with reliability.

### Grant Expenditure

Non-discretionary grants are those grants awarded if the grant application meets the specified criteria and are recognised as expenditure when an application that meets the specified criteria for the grant has been received.

Discretionary grants are those grants where the NZHPT has no obligation to award on receipt of the grant application and are recognised as expenditure when approved by the grants approval committee and the approval has been communicated to the applicant.

### Leases

**Finance leases:** The NZHPT does not enter into finance lease arrangements.

**Operating leases:** Leases that do not transfer substantially all the risks and rewards incidental to ownership of an asset to the NZHPT are classified as operating leases. Lease payments under an operating lease are recognised as an expense on a straight-line basis over the term of the lease in the statement of financial performance.

### Cash and cash equivalents

Cash and cash equivalents include cash on hand, deposits held on call and other short-term, highly liquid investments, with original maturities of three months or less.

### Debtors and other receivables

Debtors and other receivables are measured at fair value, less any provision for impairment. Impairment of a receivable is established when there is objective evidence that the NZHPT will not be able to collect amounts according to the original terms of the receivable.

## Inventories

Inventories held for sale or use in the production of goods and services on a commercial basis are valued at the lower of cost and net realisable value after making appropriate provisions for obsolete items.

## Property, Plant and Equipment

Property, plant and equipment asset classes consist of land, buildings, leasehold improvements, furniture and office equipment and motor vehicles.

The NZHPT has interest in Land and Buildings in the following categories:

(i) *NZHPT owned Land and Historic Buildings*

These are properties for which the NZHPT has freehold title.

(ii) *Vested Land and Historic Buildings*

These properties have been formally vested in the NZHPT in terms of the *Reserves Act 1977*. A vesting order can only be revoked with the agreement of the NZHPT and consequently the NZHPT's interest is deemed to be permanent.

(iii) *Controlled and Managed Buildings*

These are properties for which the NZHPT has a control and management order from the Crown in terms of the *Reserves Act 1977*. The Crown can require the NZHPT to return these assets at any stage.

Property, plant and equipment are shown at cost or valuation, less any accumulated depreciation and impairment losses.

**Revaluations:** Land and buildings are revalued with sufficient regularity to ensure that the carrying amount does not differ materially from fair value and at least every three years. Fair value is determined from market-based evidence by an independent valuer. All other asset classes are carried at depreciated historical cost.

## Accounting for revaluations

The NZHPT accounts for revaluations of property, plant and equipment on a class of asset basis. The results of revaluing are credited or debited to an asset revaluation reserve for that class of asset. Where this results in a debit balance in the asset revaluation reserve, this balance is expensed in the statement of financial performance. Any subsequent increase on revaluation that offsets a previous decrease in value recognised in the statement of financial performance will be recognised first in the statement of financial performance up to the amount previously expensed, and then credited to the revaluation reserve for that class of asset.

## Additions

The cost of an item of property, plant and equipment is recognised as an asset when it is probable that future economic benefits or service potential associated with the item will flow to the NZHPT and the cost of the item can be measured reliably.

### Disposals

Gains and losses on disposals are determined by comparing the proceeds with the carrying amount of the asset. Gains and losses on disposal are included in the statement of financial performance.

When revalued assets are sold, the amounts included in the revaluation reserves in respect of those assets are transferred to general funds.

### Subsequent costs

Costs incurred by the NZHPT in restoring property and plant to their original condition are capitalised. Costs of maintaining these assets once renovation is complete are recognised in prospective statement of financial performance in the period in which they are incurred.

### Depreciation

Depreciation is provided on a straight line basis on all property, plant and equipment (other than land, chattels, artefacts and library), at a rate that will write off the cost (or valuation) of the assets to their estimated residual value over their useful lives.

The useful lives and associated depreciation rates of major classes of assets have been estimated as follows. Heritage buildings owned or vested in the NZHPT are depreciated in accordance with IAS 16.

Computer hardware	3 years
Leasehold improvements	5 years
Farm equipment	5 years
Furniture	5 years
Office equipment	5 years
Displays and interpretation	10 years
Land development	15 years
Building internal	40 years
Building structure	100 years

The residual value and useful life of an asset is reviewed, and adjusted if applicable, at each financial year-end.

### Intangible Assets

#### *Software acquisition and development*

Acquired computer software licences are capitalised on the basis of the costs incurred to acquire and bring to use the specific software.

Costs that are directly associated with the development of software for internal use by the NZHPT, are recognised as an intangible asset. Direct costs include the software development, employee costs and an appropriate portion of relevant overheads.

Staff training costs are recognised as an expense when incurred.

Costs associated with maintaining computer software are recognised as an expense when incurred.

Costs associated with the development and maintenance of the NZHPT's website are recognised as an expense when incurred.

#### *Amortisation*

The carrying value of an intangible asset with a finite life is amortised on a straight line basis over its useful life. Amortisation begins when the asset is available for use and ceases at the date the asset is derecognised. The amortisation charge for each period is recognised in the statement of financial performance.

The useful lives and associated amortisation rates of major classes of intangible assets have been estimated as follows:

Acquired computer software	3 years
Developed computer software	4 years

#### *Impairment of non-financial assets*

Property, plant and equipment and intangible assets that have a finite useful life are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount may not be recoverable. An impairment loss is recognised for the amount by which the asset's carrying amount exceeds its recoverable amount. The recoverable amount is the higher of an asset's fair value less costs to sell and value in use.

Value in use is depreciated replacement cost for an asset where the future economic benefits or service potential of the asset are not primarily dependent on the asset's ability to generate net cash inflows and where the NZHPT would if deprived of the asset, replace its remaining future economic benefits or service potential.

If an asset's carrying amount exceeds its recoverable amount, the asset is impaired and the carrying amount is written down to the recoverable amount. For revalued assets the impairment loss is recognised against the revaluation reserve for that class of asset. Where that results in a debit balance in the revaluation reserve, the balance is recognised in the prospective statement of financial performance.

For assets not carried at a revalued amount, the total impairment loss is recognised in the prospective statement of financial performance.

The reversal of an impairment loss on a revalued asset is credited to the revaluation reserve. However, to the extent that an impairment loss for that class of asset was previously recognised in the statement of financial performance, a reversal of the impairment loss is also recognised in the prospective statement of financial performance.

For assets not carried at a revalued amount the reversal of an impairment loss is recognised in the prospective statement of financial performance.

### Creditors and other payables

Creditors and other payables are initially measured at fair value and paid at scheduled timeframes.

### Employee entitlements

#### *Short-term employee entitlements*

Employee entitlements that the NZHPT expects to be settled within 12 months of balance date are measured at undiscounted nominal values based on accrued entitlements at current rates of pay.

These include salaries and wages accrued up to balance date, annual leave earned but not yet taken at balance date, retiring and long service leave entitlements expected to be settled within 12 months and sick leave.

The NZHPT recognises a liability for sick leave to the extent that compensated absences in the coming year are greater than the sick leave entitlements earned in the coming year. The amount is calculated based on the unused sick leave entitlement that can be carried forward at balance date, to the extent that it will be used by staff to cover those future absences (actuarial basis).

The NZHPT recognises a liability and an expense for bonuses where it is contractually obliged to pay them, or where there is a past practice that has created a constructive obligation.

#### *Long-term employee entitlements*

Entitlements that are payable beyond 12 months, such as long service leave and retirement leave have been calculated on an actuarial basis. The calculations are based on the likely future entitlements accruing to staff, based on years of service, years to entitlement, the likelihood that staff will reach the point of entitlement and contractual entitlement information.

### Superannuation schemes

Obligations for contributions to Kiwisaver are accounted for as defined contribution superannuation scheme and are recognised as an expense in the prospective statement of financial performance.

## Provisions

The NZHPT recognises a provision for future expenditure of uncertain amount or timing when there is a present obligation (either legal or constructive) as a result of a past event, it is probable that expenditure will be required to settle the obligation, and a reliable estimate can be made of the amount of the obligation.

## Goods and Services Tax (GST)

All items in the prospective financial statements are exclusive of GST with the exception of accounts receivable and accounts payable, which are stated inclusive of GST. Where GST is not recoverable as input tax then it is recognised as part of the related asset or expense.

The net amount of GST recoverable from, or payable to, the Inland Revenue Department (IRD) is included as part of the receivables or payables in the prospective statement of financial position.

The net GST paid to, or received from, the IRD including the GST relating to investing and financing activities, is classified as an operating cash flow in the statement of cash flows.

Commitments and contingencies are disclosed exclusive of GST.

## Financial Instruments

The NZHPT is a party to financial arrangements as part of its everyday operations. These financial instruments include bank accounts, short-term deposits, debtors and creditors.

Revenues and expenses in relation to all financial instruments are recognised in the Statement of Financial Performance. All financial instruments are recognised in the Statement of Financial Position.

## Income Tax

The NZHPT is a public authority and consequently is exempt from the payment of income tax. Accordingly, no charge for income tax has been provided for.

## Cost Allocation

Direct costs are charged directly to specific outputs. Indirect costs are allocated across outputs based on a percentage of total direct costs.

“Direct costs” are those costs attributable to a significant activity.

“Indirect costs” are those costs that cannot be identified in an economically feasible manner with a specific significant activity.

There have been no changes to the cost allocation methodology since the date of the last audited financial statements.

### Statement of Cash Flows

Cash means cash balances on hand, held in bank accounts, demand deposits and other highly liquid investments in which the NZHPT invests as part of its day-to-day cash management.

Operating activities include all activities other than investing and financing activities. The cash inflows include all receipts from sale of goods and services and other sources of revenue that support the NZHPT's operating activities. Cash outflows include payments made to employees, suppliers and taxes.

Investing activities are those activities relating to the acquisition and disposal of current and non-current securities and any other non-current assets.

### Commitments

Future payments are disclosed as commitments at the point a contractual obligation arises, to the extent that they are equally unperformed obligations. Commitments relating to employment contracts are not disclosed.

### Contingent Liabilities

Contingent liabilities are disclosed at the point at which the contingency is evident.

### Changes in Accounting Policies

There have been no changes in accounting policies since the date of the last audited financial statements.

## THE NZHPT PROUDLY CARES FOR A RANGE OF SIGNIFICANT HISTORIC PLACES AROUND AOTEAROA NEW ZEALAND

### Heritage places in the North Island

#### Ngā wāhi taonga o te Ika a Māui

- Alberton
- Alexandra Redoubt
- Antrim House
- Bedggood Buildings
- Clendon House
- Edmonds Ruins
- Ewelme Cottage
- Highwic
- Hurworth
- Kaipara North Head Lighthouse
- Kerikeri Mission Station (Kemp House and the Stone Store)
- Mangungu Mission
- Melanesian Mission
- Old St Paul's
- Opotaka Pa
- Pencarrow Lighthouse
- Pompallier Mission
- Rangiriri Pa
- Ruatuna Homestead and farm
- Runanga Stockade
- Springvale Suspension Bridge
- Taupo Courthouse and Tapuaeharuru Redoubt
- Te Porere Redoubt
- Te Waimate Mission
- Te Wheoro's Redoubt
- Thames School of Mines *Te Apuranginui*
- Tikirere Mill Race
- Upper Hutt Blockhouse
- Whangamarino Redoubt

### Heritage places in the South Island

#### Ngā wāhi taonga o Te Wai Pounamu

- Brunner Industrial Site
- Clark's Flour Mill
- Clifden Suspension Bridge
- Craigmore Rock Shelter
- Coton's Cottage
- Frenchman's Gully Rock Shelter  
*Te Manunui*
- Fyffe House *Wai o Puka*
- Gabriel Read Memorial Reserve
- Hayes Engineering Works
- Lyttelton Timeball Station
- Matanaka Farm Buildings
- Ophir Post Office
- Rai Valley Cottage
- Seddon House site
- Southland Provincial Council Building
- The Cuddy
- The Levels
- Totara Estate

***Find out more, visit [www.historicplaces.org.nz](http://www.historicplaces.org.nz)***



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