



HERITAGE NEW ZEALAND
POUHERE TAONGA



STATEMENT OF GENERAL POLICY

MANAGEMENT AND USE OF HISTORIC PLACES OWNED, CONTROLLED
OR VESTED IN HERITAGE NEW ZEALAND POUHERE TAONGA

29 October 2015

ABOUT HERITAGE NEW ZEALAND POUHERE TAONGA

Heritage New Zealand Pouhere Taonga (HNZPT) is an autonomous Crown entity established by the Heritage New Zealand Pouhere Taonga Act 2014 (HNZPTA). The HNZPT's role, as defined by the HNZPTA, is "to promote the identification, protection, preservation and conservation of the historical and cultural heritage of New Zealand". HNZPT is New Zealand's leading national historic heritage agency and is seen by the public as the guardian of this country's national historic heritage.

HNZPT IS governed by a Board that is responsible for the organisation's strategic direction, while taking into account government priorities and desired outcomes. The Māori Heritage Council has specific statutory functions under the HNZPTA relating to the promotion and conservation of many aspects of Māori heritage. The Council works closely with the Board and advises the Board on matters of interest to Māori and on undertaking its work in a culturally appropriate manner.

The national office in Wellington provides key service, support and policy functions, and a Māori Heritage team operates throughout the management and organisational structure. There are regional and area offices located in Auckland, Wellington, Christchurch, Kerikeri, Tauranga and Dunedin and the Heritage Destinations Team manages 48 historic properties around the country, 15 of which are staffed.

The work of HNZPT focuses on:

- Identifying and recording information on historical and cultural heritage, through assessments and entering significant heritage onto the New Zealand Heritage List/Rārangī Kōrero or identifying National Historic Landmarks/Ngā Manawhenua o Aotearoa me ōna Kōrero Tūturu.
- Promoting the conservation of significant historical and cultural heritage, through advice, capacity building, advocacy, regulation, ownership of selected properties, and providing targeted incentive funding.
- Engaging with heritage owners, iwi and hapū, heritage professionals, the public, councils and government on heritage. ■

STATEMENTS OF GENERAL POLICY

To provide leadership and direction in key areas of work, HNZPT has produced statements of general policy for five key activities, as required by section 17 of the HNZPTA. This policy covers the management and use of **historic places** owned, controlled or vested in HNZPT:

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The other statements of general policy cover:

- The administration of the archaeological provisions
- The statutory role of advocacy
- The administration of the New Zealand Heritage List/Rārangī Kōrero

- The administration of the National Historic Landmarks List/Ngā Manawhenua o Aotearoa me ōna Kōrero Tūturu.

The HNZPTA requires that HNZPT consults on the draft policies by making them publicly available and inviting public comment. The draft policies were publicly notified on 3 February 2015 and submissions closed on 17 April 2015. HNZPT has considered all submissions received on the draft policies. This policy was approved by the Māori Heritage Council and the HNZPT Board on 29 October 2015. Each statement of general policy must be reviewed within 10 years of adoption. ■

STATEMENT OF GENERAL POLICY: MANAGEMENT AND USE OF HISTORIC PLACES OWNED, CONTROLLED OR VESTED IN HERITAGE NEW ZEALAND POUHERE TAONGA

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IMAGE: STEVE BURGESS

INTRODUCTION

WHY HERITAGE NEW ZEALAND POUHERE TAONGA MANAGES HISTORIC PLACES

HERITAGE NEW ZEALAND Pouhere Taonga (HNZPT) manages a diverse portfolio of **historic places** and associated **heritage collections** that symbolise important aspects of our distinct society and culture, represent significant events in New Zealand's history, contribute to a sense of national identity, have associations with significant people and demonstrate the origins and development of our diverse society and culture.

HNZPT safeguards these significant places and collections for present and future generations. The protection and **conservation** of these places and collections will ensure their survival so that people can continue to appreciate, enjoy, visit and experience them. HNZPT endeavours to make its **historic places** accessible to all New Zealanders and seeks to engage with the public to foster an understanding of our significant places and the historical and cultural values they represent.

The former New Zealand Historic Places Trust began acquiring historic places from 1959, and the majority of properties were obtained in the 1970s. **Acquisition** was seen as a primary method to achieve heritage protection and **conservation** and to educate the public in nationally significant history and heritage, and also as a means of promoting heritage. Since the 1980s, few additional **acquisitions** of property have been made by HNZPT largely because of financial constraints.

The **historic places** owned and managed by HNZPT are listed in its Annual Report available from the HNZPT website.¹ Many of the **historic places** are historic reserves owned by the Crown and controlled and managed by, or vested in, HNZPT. These properties are governed by the Reserves Act 1977. Other **historic places** are owned by HNZPT through gifts and bequests, leased by HNZPT, owned jointly with other agencies, or in Māori reserve management arrangements. HNZPT also controls and manages a number of private reserves.

HISTORIC PLACES NOT JUST SURVIVE BUT THRIVE

A mixed funding model of government, commercial and philanthropic funding is used by HNZPT to ensure the successful and sustainable management and **use** of its **historic places**. However, there continues to be an imbalance between the property management responsibilities of HNZPT and the resources available to carry them out. HNZPT continues to seek management arrangements and commercial opportunities that are **conservation**-led, protect **heritage values** and allow opportunities for the public to appreciate and engage with significant **historic places**.

HNZPT will continue to assess its property portfolio based on criteria of heritage value, appreciation and affordability. The organisation has the ability to dispose or divest itself of properties or seek alternative management arrangements for them where consistent with this policy. This methodology will also be applied to the **acquisition** of any future property. In all cases there needs to be a justification for the ownership of heritage by the organisation. There are a number of **historic places** whose **heritage values** are such that public ownership may be the only means by which their significant **heritage values** can be conserved and appreciated over the long term. HNZPT will continue to work towards improving its financial sustainability to ensure its ability to continue to allocate appropriate resources to the **conservation** and management of its **historic places**.

PURPOSE OF THE POLICY

The purpose of this policy is to guide the management and **use** of the **historic places** owned, controlled or vested in HNZPT. It replaces the General Policy for the Management, Administration, Control, and Use of all Historic Places Owned, Controlled or Vested in the New Zealand Historic Places Trust prepared under the Historic Places Act 1993 and is intended to be consistent with legislation in force at the time of writing. HNZPT will review and amend this policy when necessary to adapt to changes in legislation, changes in policy and in accordance with increased knowledge. The HNZPT will also participate fully in any legislative

¹ <http://www.heritage.org.nz>. The Annual Report is available within the Resources section.

or policy review processes led by other agencies that relate to or affect the management and **use** of its **historic places**.

This policy provides high level guidance for the management and **use** of all **historic places** owned and managed by the HNZPT and applies to those **historic places** as listed in its Annual Report. This policy does not apply to ownership, leasing or renting by HNZPT of property for the purposes of staff accommodation or operational or administrative use, unless such properties have been listed in its Annual Report. This is because the purpose of such administrative use is not for public access and interpretation. In addition, this policy does not apply to places which have been acquired by HNZPT with the intent of securing their protection and then reselling, or a property that has been acquired for a commercial purpose.

In addition to legislative requirements, this policy has been formulated within the context of a number of national and international policy documents, guidelines and charters, in particular, the ICOMOS New Zealand Charter for the Conservation of Places of Cultural Heritage Value² (ICOMOS New Zealand Charter 2010) and the Policy for Government departments' management of historic heritage 2004³.

Specific guidance has been provided with regard to the various specialist plans that are important tools in the conservation and management of our **historic places**. These plans include property management plans, conservation plans, collection management plans and reserve management plans. Reserve management plans are a statutory requirement under the Reserves Act. ■

² ICOMOS NZ. ICOMOS New Zealand Charter for the Conservation of Places of Cultural Heritage Value, Wellington, ICOMOS, 2010. <http://www.icomos.org.nz/nzcharters.htm>, accessed 25 August 2015.

³ Ministry for Culture and Heritage, Policy for Government departments' management of historic heritage 2004, Wellington, MCH, 2004. <http://www.mch.govt.nz/research-publications/our-research-reports/policy-government-departments-management-historic-heritag>, accessed 25 August 2015.

LEGISLATIVE CONTEXT

This general policy has been prepared under section 17 of the HNZPTA to provide policy for the management and use of all **historic places** owned, controlled, or vested in HNZPT.

SECTION 17 outlines the procedures for adopting a general policy which includes a public consultation process. The section also states that this policy will be reviewed by HNZPT no later than 10 years after its adoption. Section 18 provides for amendments to the policy and section 20 provides that HNZPT must not act in any manner inconsistent with a statement of general policy.

To recognise and respect the Crown's responsibility to give effect to the Treaty of Waitangi, the HNZPTA contains specific provisions relating to the functions, powers and delegations of the Māori Heritage Council and in relation to managing **historic places** or **historic areas of interest to Māori, wāhi tūpuna, wāhi tapu** or **wāhi tapu areas**.

The objectives and policies and the list of properties owned and managed by HNZPT have statutory significance in accordance with section 17 of the HNZPTA. Other text in this document is for introductory and explanatory purposes and has no statutory significance.

HERITAGE NEW ZEALAND POUHERE TAONGA ACT 2014

The work of HNZPT is shaped by section 3 of the HNZPTA, the purpose of which is:

to promote the identification, protection, preservation, and conservation of the historical and cultural heritage of New Zealand.

In achieving this purpose HNZPT is required to recognise the following principles in all of its work:⁴

- (a) the principle that historic places have lasting value in their own right and provide evidence of the origins of New Zealand's distinct society; and
- (b) the principle that the identification, protection, preservation and conservation of New Zealand's historical and cultural heritage should -

- (i) take account of all relevant cultural values, knowledge and disciplines; and
- (ii) take account of material of cultural heritage value and involve the least possible alteration or loss of it; and
- (iii) safeguard the options of present and future generations; and
- (iv) be fully researched, documented and recorded, where culturally appropriate; and
- (c) the principle that there is value in central government agencies, local authorities, corporations, societies, tangata whenua and individuals working collaboratively in respect of New Zealand's historical and cultural heritage; and
- (d) the relationship of Māori and their culture and traditions with their ancestral lands, water, sites, wāhi tūpuna, wāhi tapu, and other taonga.

The general functions of HNZPT in section 13 of the HNZPTA include:⁵

to manage, administer, and control historic places, buildings, and other property owned or controlled by Heritage New Zealand Pouhere Taonga or vested in it to ensure their protection, preservation, and conservation.

The relevant powers of HNZPT in regard to the management and use of its **historic places** is outlined in section 14 of the HNZPTA:

- (c) acquire, restore, conserve, and manage historic places and historic areas, or assist any person or organisation to do one or more of those things
- (f) enter into agreements with local authorities, corporations, societies, individuals, or other controlling bodies for the management, maintenance, and preservation of any historic place or historic area or, where appropriate, wāhi tūpuna, wāhi tapu, or wāhi tapu area

⁴ Section 4 of the HNZPTA

⁵ Section 13 (1) (f) of the HNZPTA

- (g) in relation to any land or buildings owned or controlled by Heritage New Zealand Pouhere Taonga or vested in it, make them accessible to the public, charge fees for admission, lease or let them, or use them for any suitable purpose.

In accordance with section 16 (1) of the HNZPTA, this general policy states objectives and policies for the management and use of its **historic places**.

RESERVES ACT 1977

Historic reserves are established under the Reserves Act “for the purpose of protecting and preserving in perpetuity places, objects and natural features that are of historic, archaeological, cultural, educational or other special interest.”⁶

HNZPT, as the administering body, derives its authority to administer a reserve from either “vesting” or “an appointment to control and manage”.⁷ In order to achieve the purpose of the HNZPTA, HNZPT will “manage, administer and control” **historic places** it manages “to ensure their protection, preservation and conservation.”⁸

The administering body’s functions are defined under section 40 (1) of the Reserves Act and include:

The administering body shall be charged with the duty of administering, managing, and controlling the reserve under its control and management in accordance with the appropriate provisions of this Act and in terms of its appointment and the means at its disposal, so as to ensure the use, enjoyment, development, maintenance, protection, and preservation, as the case may require, of the reserve for the purpose for which it is classified.

The administering body holds certain powers depending on the authority by which it exercises its responsibility for the reserve and the trust under which it holds that authority. Powers in respect of historic reserves are defined under section 58 of the Reserves Act and include:

- (b) *With prior consent of the Minister, set apart and use part of the reserve [...] for other buildings necessary for the proper and beneficial management, protection, and maintenance of the reserve, and for the provision of displays and information for visitors to the reserve.*
- (d) *Do such other things as may be considered necessary or desirable for the proper and beneficial management, administration, and control of the reserve.*

Any work on reserves such as adaptation, development or new construction, is likely to require the consent of the Minister of Conservation.

HNZPT is required to have an approved management plan for reserves under its control. It is bound to comply with the plan in carrying out its functions. The plan must be consistent with the provisions of the Reserves Act and the classification of the reserve.

Section 59A of the Reserves Act outlines the granting by the Minister of Conservation of a concession, such as a lease or easement, over a reserve in accordance with Part IIIB of the Conservation Act 1987. Where the use of a reserve managed by HNZPT requires such a concession, HNZPT will seek permission from the Minister of Conservation.

Private historic reserves are also subject to the Reserves Act and are covered under section 76.

TE TURE WHENUA MĀORI ACT 1993

Māori reservations are established under Part 17 of Te Ture Whenua Māori Act 1993. They may be established for a range of purposes, including for cultural, historical or scenic interests. They may also provide for a wāhi tapu, being a place of special significance according to tikanga Māori.⁹

HNZPT manages two places that are Māori reserves under the Te Ture Whenua Māori Act. ■

⁶ Section 18(1) of the Reserves Act.

⁷ <http://www.doc.govt.nz/about-us/our-role/legislation/guides-and-bylaws/a-guide-for-reserve-administering-bodies/> accessed 24 August 2015

⁸ Section 13 (f) of the HNZPTA.

⁹ Part 17 338 (1) (a) and (b), of the Te Ture Whenua Māori Act 1993.

INTERPRETATION

This statement of general policy contains an introductory section which is followed by objectives, being the outcomes we are seeking, and policies that will achieve those objectives. Individual statements in the policy should not be considered in isolation but in the context of the policy as a whole.

THIS POLICY is subservient to the HNZPTA.

In this policy the term “HNZPT” refers to the organisation Heritage New Zealand Pouhere Taonga generally and includes the Heritage New Zealand Pouhere Taonga Board and the Māori Heritage Council. The Board and the Council are identified specifically where relevant.

The **historic places** owned, leased, managed, controlled or vested in HNZPT are listed on the HNZPT website. Throughout this document they are generally referred to as **historic places** “managed” by HNZPT for the purpose of simplicity.

In this policy statement the numbering and order of objectives and policies is solely for convenience and is not to be interpreted as an indication of relative importance.

A Glossary can be found at the back of this policy. Terms in bold text have the meaning as set out in the Glossary. ■

PURPOSE AND PRINCIPLES

HNZPT manages **historic places** for the purpose of protecting, conserving and interpreting places of historical and cultural importance to this country. These places contribute to a sense of national identity, deepen an understanding of New Zealand's heritage and contribute to a national network of cultural tourism sites. To achieve this purpose there are a number of principles under the HNZPTA to guide HNZPT in its management and **use** of these places.

OBJECTIVE 1: HNZPT will provide for the protection, **conservation** and appreciation of **historic places** of significant **heritage value** it manages.

POLICIES:

- 1.1 HNZPT will promote the protection, **conservation** and interpretation of the historical and cultural heritage of New Zealand through its function of managing **historic places**.
- 1.2 HNZPT will manage **historic places** that have significant **heritage value** and recognise the principle that these **places** have lasting value in their own right and provide evidence of the origins of New Zealand's distinct society.
- 1.3 HNZPT will manage and **use** its **historic places** in a sustainable manner that safeguards the options of present and future generations.
- 1.4 HNZPT will take account of material of cultural **heritage value** and involve the least possible alteration or loss of it in the management and **use** of its **historic places**.
- 1.5 HNZPT will take account of all relevant cultural values, knowledge and disciplines in its management and **use** of its **historic places**.
- 1.6 HNZPT will fully research, document, and record, where culturally appropriate, the **heritage values** of the **historic places** it manages.
- 1.7 HNZPT will work collaboratively with central government agencies, local authorities, corporations, societies, iwi and hapū, and individuals working in respect of New Zealand's historical and cultural heritage, to promote, protect and conserve its **historic places**.
- 1.8 HNZPT will recognise the relationship of Māori and their culture and traditions with their ancestral lands, water, sites, **wāhi tūpuna**, **wāhi tapu**, and other taonga in its management and **use** of its **historic places**.
- 1.9 HNZPT may seek external funding for the **conservation**, interpretation, **adaptation** and development of its properties.
- 1.10 HNZPT may enter into agreements to manage properties it owns with other groups including central government agencies, local authorities, corporations, societies, iwi and hapū, individuals, and groups working in respect of New Zealand's historical and cultural heritage, to promote, protect and conserve its **historic places**.

MĀORI HERITAGE VALUES

HNZPT recognises that many of the historic places that it manages are of interest to Māori. Some places have been identified and entered into the New Zealand Heritage List/Rārangi Kōrero¹⁰ as **historic places** or **historic areas of interest to Māori, wāhi tūpuna, wāhi tapu** or **wāhi tapu areas**.

Māori heritage sites give meaning to the history, traditions, culture, and identity of whānau, hapū and iwi. The histories and events which occurred at places of **heritage significance** are, in a sense, embedded in those places and in relationships with them. Māori heritage relates not only to the physical places, but also the knowledge and stories of those places¹¹.

OBJECTIVE 2: **Historic places**, and their associated **heritage collections**, managed by HNZPT that are of interest to Māori are **conserved**, protected, **used** and interpreted with respect for Māori **heritage values**.

POLICIES:

- 2.1 HNZPT will recognise the relationship of Māori and their culture and traditions with their ancestral lands, waters, sites, **wāhi tūpuna, wāhi tapu** and other taonga in its management, interpretation and promotion of its **historic places that are of interest to Māori**.
- 2.2 HNZPT will promote the unique contribution of Māori, as the indigenous people of New Zealand, to national identity and the development of New Zealand's diverse society in its management, **use** and interpretation of its **historic places that are of interest to Māori**.
- 2.3 HNZPT will develop effective consultative relationships with Māori so that HNZPT's management, **conservation** and interpretation of its **historic places** is, where relevant, fully informed by appropriate whānau, hapū and iwi and other Māori having historical or cultural association with the place.
- 2.4 HNZPT will encourage the involvement of appropriate whānau, hapū and iwi and other Māori having historical or cultural association with the place in the management, **conservation** and interpretation of its **historic places of interest to Māori**, to ensure that their relationship with their heritage is safeguarded, traditional Māori knowledge is respected, and appropriate tikanga is applied.
- 2.5 HNZPT may negotiate and implement agreements, protocols, partnerships or memoranda of understanding with whānau, hapū and iwi in relation to the management and interpretation by HNZPT of its **historic places that are of interest to Māori**.

¹⁰ The New Zealand Heritage List/Rārangi Kōrero, continued under the HNZPTA under section 65(1) is the same as the Register established under section 22 of the Historic Places Act 1993.

¹¹ Heritage New Zealand Pouhere Taonga, Tapuwae, The Māori Heritage Council Statement on Māori Heritage: A Vision for Places of Māori Heritage, Wellington: HNZPT, 2014, p. 3. <http://www.heritage.org.nz/resources/tapuwaae>, Accessed 25 August 2015.

STATUTORY OBLIGATIONS

HNZPT as a Crown entity, employer, and owner and manager of **historic places**, has a number of statutory responsibilities regarding the management and **use** of its **places** and the people that work in, visit and access them.

OBJECTIVE 3: In the management and **use** of its **historic places** HNZPT will act in accordance with applicable statutory requirements, functions and powers.

POLICIES:

- 3.1** HNZPT will act in accordance with the purpose, principles and relevant provisions of the HNZPTA, including those relating to archaeological sites, in the management and **use** of its **historic places**.
- 3.2** HNZPT will act in accordance with any applicable legislation, policies, plans, regulations, bylaws and code requirements which apply in the particular circumstances, to the management and **use** of its **historic places**, including the:
- (i) Building Act 2004, in relation to seismic strengthening, sanitary facilities, accessibility, fire risk and new structures
 - (ii) Conservation Act 1987, in relation to the granting of concessions
 - (iii) Crown Entities Act 2004
 - (iv) Health and Safety in Employment Act 1992, in relation to its staffed properties and public safety when accessing its sites
 - (v) Official Information Act 1982
 - (vi) Occupiers' Liability Act 1962
 - (vii) Public Records Act 2005, in relation to the storage of archives and documents
 - (viii) Protected Objects Act 1975
 - (ix) Privacy Act 1993
 - (x) Reserves Act 1977, in relation to the management of reserves
 - (xi) Resource Management Act 1991; and
 - (xii) Te Ture Whenua Māori Act 1993, in relation to the management of Māori Reserves.
- 3.3** HNZPT will act in accordance with the requirements of the legislation under which the **historic place** is held, managed, controlled or vested, its land status and classification, and the conditions of any relevant deeds and grants.
- 3.4** HNZPT will act in accordance with any Settlement Act or legislation as it relates to **historic places** that it manages.

PLANS

Specialist plans govern and guide the protection, **conservation**, management and use of **historic places** managed by HNZPT. These include property management plans, conservation plans, collection management plans and reserve management plans. Risk management should be considered in the preparation of these plans.

PROPERTY MANAGEMENT plans set out the overall approach for the management of **historic places**. They outline the current status of the place and identify future needs, opportunities and constraints. They should be regularly revised, identifying any significant change of circumstances so that they can be used to proactively guide management decisions.

Property management plans will include a concise history and **heritage significance** of the place and outline operational details. They will identify key opportunities and risks and identify impacts, performance measurements and timelines relating to these. They will include long term indications of major physical work planned, including the development of facilities and interpretation, planning for visitor numbers, and actions to manage risk.

A conservation plan is the principal guiding document for the **conservation** and care of a **historic place**. A plan will describe a place and its history and identify its **significance** and **heritage values**. It will establish conservation policies to safeguard those values and make recommendations through which the policies can be put into action. The comprehensiveness of a conservation plan will be a reflection of the size and complexity of the property and may include reference

to specialist reports such as seismic strengthening, fire or accessibility reports. The process by which HNZPT can adopt a conservation plan is set out in section 19 of the HNZPTA.

HNZPT's **heritage collections** are considered to be assets which contribute to the **heritage values** of its **historic places**. A collections management plan guides the long-term care of an object or collection of objects. It will include a description of the object or collection, establish its **cultural significance**, assess condition and recommend how the collection is best cared for and maintained. The guidelines for the care and management of HNZPT's **heritage collections** are set out in the HNZPT Collection Management Principles document.¹²

Under the Reserves Act, all reserves managed by HNZPT are required to have a reserve management plan, which include information about the reserve and state the reserves classification. They outline principal management objectives such as **preservation, conservation**, function, character, **use**, development and integrity. They also include policy statements on how to meet these objectives and make recommendations as to how the policies can be implemented.

¹² Collection Management Principles, HNZPT, 2008.

OBJECTIVE 4: HNZPT's management and use of its **historic places** is guided by appropriate plans.**POLICIES:***Property management plans*

- 4.1 HNZPT will prepare or commission, from the relevant experts, property management plans for all of its **historic places**.
- 4.2 Property management plans will be prepared or reviewed in consultation with appropriate whānau, hapū and iwi having historical or cultural associations with the place.
- 4.3 Property management plans will be regularly reviewed and updated.

Conservation plans

- 4.4 HNZPT will prepare or commission a conservation plan before significant **conservation** or development work is planned and carried out at its **historic places**.
- 4.5 HNZPT will follow the procedures for adopting a conservation plan as set out in the HNZPTA.¹³
- 4.6 HNZPT will make amendments to the conservation plan in response to changing circumstances or in accordance with increased knowledge.¹⁴
- 4.7 HNZPT will not act inconsistently with a conservation plan unless the HNZPT Board resolves on reasonable grounds that an action may be taken that is inconsistent with the conservation plan.¹⁵
- 4.8 Conservation plans will be prepared by suitably experienced heritage professionals in accordance with **conservation** processes and practices outlined in the ICOMOS New Zealand Charter 2010 and HNZPT Guidance for Preparing Conservation Plans.
- 4.9 Conservation plans will be regularly reviewed, and updated by appropriately qualified professionals following significant physical changes to the **historic place**.
- 4.10 Conservation plans for **historic places** managed by HNZPT will be made accessible to the public.

Collection management plans

- 4.11 HNZPT will prepare or commission collection management plans in accordance with recognised codes of practice for each **heritage collection** on a site-by-site basis consistent with the HNZPT Collection Management Principles document.¹⁶
- 4.12 HNZPT will manage its **heritage collections** in accordance with collection management plans.
- 4.13 Collection management plans will be regularly reviewed and updated following significant physical changes to the collection, including relocating parts or all of a collection from its current location.

¹³ Section 19 of the HNZPTA¹⁴ Section 19 of the HNZPTA¹⁵ Section 20 of the HNZPTA¹⁶ Collection Management Principles, NZHPT, 2008

Reserve management plans

- 4.14** HNZPT will prepare or commission, from the relevant experts, reserve management plans for all reserves controlled and managed or vested in HNZPT.
- 4.15** Reserve management plans will be prepared, adopted, reviewed and complied with in accordance with section 41 of the Reserves Act.
- 4.16** Reserve management plans will provide for and ensure the use, enjoyment, maintenance, protection, preservation and the development, as appropriate, of the reserve for the purposes for which it is classified.¹⁷
- 4.17** HNZPT will be guided on the preparation of reserve management plans by the guidelines prepared by the Department of Conservation.¹⁸
- 4.18** A reserve management plan may cover more than one reserve where it is convenient and useful to do so.
- 4.19** Reserve management plans will be regularly reviewed and updated.

¹⁷ Section 41(3) of the Reserves Act

¹⁸ A Guide for Reserve Administering Bodies, Wellington, Department of Conservation, 2006.

PROTECTION AND CONSERVATION

HNZPT will promote the protection of its **historic places** through statutory recognition and legal protection. The **conservation** of a **historic place** will include the processes of preserving, maintaining, and restoring a place to safeguard its **historical and cultural heritage values**.

Heritage places may be vulnerable to natural disasters such as floods, storms, or earthquakes; or to humanly induced threats and risks such as fire, neglect, vandalism or theft. To safeguard **heritage values**, potential risks to the place should be assessed, and planning for risk mitigation and emergency management put in place as necessary.

OBJECTIVE 5: The heritage values of historic places managed by HNZPT are protected and conserved.

POLICIES:

- 5.1** HNZPT will promote the protection of its **historic places** through advocating for their entry onto the heritage schedules of the relevant district plan or regional plan.
- 5.2** HNZPT will assess potential risk to the **historic places** it owns or manages, including their **heritage collections, curtilage** and **settings**, from natural disasters and humanly-induced threats and risks and implement methods to reduce risk as far as practicable.
- 5.3** HNZPT will ensure that the archaeological provisions of the HNZPTA are followed in relation to the properties it manages.
- 5.4** HNZPT will ensure that its **historic places that are of interest to Māori** are protected and conserved in a manner that respects mātauranga Māori and is consistent with the tikanga of the hapū and/or iwi associated with that place.
- 5.5** Heritage gardens and the **curtilage** associated with **historic places** managed by HNZPT should be protected, interpreted, maintained and made relevant so that their historic, ecological and aesthetic values are retained and recognised.
- 5.6** Where significant values, other than **historical or cultural heritage values**, are present at a **historic place**, these values should be identified, assessed, managed and protected to the extent compatible with the protection and **conservation** of the **heritage values** of the place.
- 5.7** Significant physical interventions, activities, works and uses at **historic places** managed by HNZPT will be guided by:
- (i) a property management plan, conservation plan, collections management plan and/or reserve management plan
 - (ii) recognised conservation charters, principles and codes of practice, in particular the ICOMOS New Zealand Charter 2010
 - (iii) HNZPT's own heritage guidelines
 - (iv) relevant research, recording, assessment, building plans and specifications
 - (v) appropriately qualified and experienced heritage professionals and experts from relevant fields including archaeology; and
 - (vi) consultation with appropriate stakeholders including whānau, hapū and iwi and other Māori having historical or cultural association with the place.

POLICIES:

- 5.8** An intervention for **conservation** purposes at a **historic place** managed by HNZPT may include:
- (i) **preservation** through **stabilisation, maintenance or repair**
 - (ii) **restoration** through **reassembly, reinstatement** or removal
 - (iii) **reconstruction**; and
 - (iv) **adaptation**.
- 5.9** The extent of intervention for **conservation** purposes will be guided by the **heritage values** of the place and the policies for its management as identified in any conservation plan, property management plan, collections management plan and/or reserve management plan.
- 5.10** Preference will be given to the least degree of intervention and any intervention that would reduce or compromise **heritage values** is undesirable.
- 5.11** HNZPT will monitor the condition of the **historic places** it manages; carry out **maintenance** and **repairs** as required and remedy any risk to ensure the health and safety of occupants, staff and visitors.
- 5.12** **Reconstruction** may be undertaken at **historic places** managed by HNZPT only where this is based on sufficient physical and documentary evidence to minimise conjecture, is necessary for the purposes of conservation or interpretation, and supports the **heritage values** of the place or its **setting**.
- 5.13** **Reconstruction** of an entire building destroyed by natural disaster or humanly induced damage may be acceptable if there are exceptional social or cultural motives that are related to the identity of the entire community.¹⁹
- 5.14** Where the **setting** of a place is integral to its **heritage value**, that **setting** should be conserved with the place itself. If the **setting** no longer contributes to the **heritage value** of the place, and if **reconstruction** of the **setting** can be justified, any **reconstruction** of the **setting** should be based on an understanding of all aspects of the **heritage value** of the place.²⁰
- 5.15** Where a proposal may lead to the loss of or adverse effects on a **historic place**, HNZPT will prepare a **Heritage Impact Assessment**, which considers all the relevant values and options, having regard to the provisions of any property management plan, conservation plan and/or reserve management plan.
- 5.16** HNZPT will participate in planning processes relating to changes to properties adjacent to **historic places** managed by HNZPT to avoid impacts on **heritage values**.

¹⁹ Article 4, Charter of Cracow 2000.

²⁰ Article 9: Setting, ICOMOS NZ Charter 2010

ADAPTATION, DEVELOPMENT AND NEW CONSTRUCTION

The conservation of a **historic place** can be facilitated by it serving a useful purpose. **Adaptation** of a **historic place** may arise from maintaining its continuing **use** or from a proposed change of **use**. Enhancing visitor experience and economic opportunities at a **historic place** through development or new construction may also be necessary to facilitate the sustainable **use** of a place and contribute to public appreciation and engagement.

OBJECTIVE 6: **Historic places** managed by HNZPT are adapted for a **compatible use**, developed or involve new constructions where the work will contribute to the **conservation** and protection of the **heritage values** of the **historic place**.

POLICIES:

- 6.1** **Adaptation** in the form of alterations and additions to **historic places** managed by HNZPT should be the minimum necessary, substantially reversible and should have little or no adverse effect on the **heritage values** of the **historic place**.
- 6.2** Development or new construction, such as buildings, structures and facilities for interpretation or visitor services, may be undertaken at a **historic place** managed by HNZPT, subject to the approval of the HNZPT Board.
- 6.3** In the case of a reserve for which HNZPT is the administering body under the Reserves Act, any proposed development or new construction requires the prior consent of the Minister of Conservation, and must be undertaken in accordance with a reserve management plan and section 58 of the Reserves Act.
- 6.4** When HNZPT adapts its **historic places**, and/or facilitates development or construction it will take into account the following:
- (i) that any change is beneficial for the management, protection, **conservation** or interpretation of the place and its **heritage collections**, or for public access, understanding, appreciation, convenience or safety
 - (ii) that any change cannot be provided readily or appropriately within existing facilities or outside of the place
 - (iii) where reasonable and practicable any change will not significantly affect the **heritage values** of the place, its **curtilage** or its **setting** or the long term **maintenance** and **conservation** of those values, and any adverse effects are minimised and as far as possible mitigated
 - (iv) any change will be readily distinguishable from the heritage fabric so as not to falsify the **heritage values** or confuse the public understanding of the place
 - (v) the proposed work has been subject to a **Heritage Impact Assessment**, which considers all the relevant values and options, having regard to the provisions of any property management plan, conservation plan, collections management plan and/or reserve management plan
 - (vi) the requirements of applicable legislation, policies, plans, regulations, bylaws and code requirements, including the archaeological provisions of the HNZPTA, have been complied with.
- 6.5** Where significant change is proposed to its **historic places** HNZPT will enter into early consultation with key stakeholders including central government agencies, local authorities, corporations, societies, local communities, iwi and hapū and those with a known interest in the place.

ACCESS AND USE

HNZPT supports improving physical access to, and the appropriate use of, its **historic places** to ensure New Zealanders can appreciate, enjoy, visit and experience these places. Improving accessibility to **historic places** managed by HNZPT will involve the evaluation of a range of options and the selection of the most appropriate solution. HNZPT will work to achieve accessibility with the least impact on **heritage values**. This may involve the use of digital and virtual options rather than physical access.

OBJECTIVE 7: The **use of historic places** managed by HNZPT provides for public access and the appreciation and understanding of New Zealand’s historical and cultural heritage.

POLICIES:

- 7.1** **Historic places** managed by HNZPT are presented and interpreted to facilitate physical and/or virtual or digital access by the public so they can appreciate, enjoy, visit and experience **historic places**.
- 7.2** HNZPT will facilitate and improve accessibility to its **historic places**, as is reasonably practicable, taking into account effects on **heritage values**.
- 7.3** Access to **historic places** managed by HNZPT may be subject to:
- (i) restrictions necessary for **conservation** concerns, security, operation and management of the property
 - (ii) restrictions necessary for the safety and control of the public
 - (iii) in cases where physical access is restricted, HNZPT will endeavour to provide interpretation and presentation off-site²¹; and
 - (iv) fees for admission to the whole or part of a **historic place**, and for the use of amenities and facilities. In the case of reserves for which HNZPT is the administering body, this would be subject to the approval of the Minister of Conservation under section 58(c) of the Reserves Act.
- 7.4** Where the provision of access and use results in significant change HNZPT will prepare a **Heritage Impact Assessment**, which considers all the relevant values and options, having regard to the provisions of any property management plan, conservation plan, collections management plan and/or reserve management plan.
- 7.5** HNZPT will ensure that **historic places** it manages are used for a suitable purpose and where a change of **use** is proposed, the new **use** will be compatible with the **heritage values** of the place, and will not result in a significant adverse effect on those **heritage values**.

²¹ Principle 1.6, ICOMOS Ename Charter for the Interpretation of Cultural Heritage Sites, 2008.

- 7.6 Where consistent with this statement of general policy, and subject to written agreements and insurance requirements, **historic places** managed by HNZPT may be used for:
- (i) public educational and recreational programmes, activities, events, functions and revenue generation
 - (ii) continuation of the original or long-term use
 - (iii) operational and administrative purposes
 - (iv) commercial and retail purposes.
- 7.7 Marketing, branding or merchandising relating directly to any **historic place** or collection item managed by HNZPT should respect the **heritage values** of the place or collection item and strengthen public appreciation of those values.
- 7.8 HNZPT will carry out and co-ordinate market and visitor research to inform the management and **use** of its **historic places** and to determine whether, and to what degree, stated outcomes and visitor expectations are being achieved.

INVOLVEMENT WITH COMMUNITIES OF INTEREST AND AGENCIES

HNZPT collaborates and engages with a number of communities of interest and agencies that have associations or connections to the **historic places** it manages. Creating opportunities for people to connect meaningfully with **historic places** strengthens the relationship of that **historic place** in the physical and social fabric of that community.

OBJECTIVE 8: HNZPT develops effective relationships and partnerships with communities of interest and agencies to enhance its management, promotion and interpretation of **historic places**.

POLICIES:

- 8.1** HNZPT will develop and maintain collaborative working relationships with relevant agencies and communities of interest including whānau, hapū and iwi, heritage organisations, societies, corporations and individuals to:
- (i) ensure appropriate standards of heritage **conservation**, management, and engaging and authoritative interpretation; and
 - (ii) ensure that the relationships between those with an interest in particular **historic places** and/or **heritage collections** are safeguarded.
- 8.2** **Historic places** should play a role in, interact with and contribute to the cultural, social and economic well-being of their local communities.
- 8.3** For the purposes of strengthening the relationships between **historic places** and those interested in the **historic place**, and to assist HNZPT in relation to its management, promotion and interpretation of particular **historic places**, HNZPT will encourage:
- (i) volunteering opportunities
 - (ii) the formation and success of support groups
 - (iii) public educational and recreational programmes, activities, functions and events; and
 - (iv) digital partnerships and other collaborative arrangements.
- 8.4** HNZPT may collaborate with agencies or **owners** who manage related or nearby heritage properties to provide appropriately co-ordinated heritage **conservation** and interpretation.
- 8.5** HNZPT may negotiate and implement partnership agreements, commercial arrangements, protocols or memoranda of understanding with agencies and communities of interest including whānau, hapū and iwi, heritage organisations, societies, corporations and individuals in relation to the management, promotion and interpretation of particular **historic places** and/or **heritage collections**, provided that **heritage values** are protected and conserved.

INTERPRETATION AT HISTORIC PLACES

HNZPT manages staffed and unstaffed properties throughout New Zealand and endeavours to provide a range of interpretation methods to communicate to a variety of visitors. Interpretation provides for a greater understanding and awareness of **historic places** and assists visitors to engage with the place and the stories of New Zealand's culture. Understanding of the **heritage values** of **historic places** is important for their long term survival. HNZPT provides a range of interpretation at its **historic places** such as signage, tours, education kits and digital media such as interactive displays and tours.

OBJECTIVE 9: Interpretation of **historic places** managed by HNZPT reveals their values, inspires a sense of national identity and enhances visitor experience.

POLICIES:

- 9.1** Important narratives in New Zealand history will be communicated, where feasible and culturally appropriate, at the locations where the events or processes occurred, and may also be communicated through other means including the internet and electronic devices.
- 9.2** **Historic places** managed by HNZPT will be interpreted to:
- (i) convey the meaning of the place in its wider context
 - (ii) inspire insights into the aspects or periods of the heritage of New Zealand illustrated by the **historic place** or events or people associated with it
 - (iii) educate and inform a sense of national identity and an appreciation of the heritage of New Zealand's diverse society and culture; and
 - (iv) enhance visitor experience, engage a wide range of visitors and strengthen heritage tourism.
- 9.3** Interpretation of **historic places** managed by HNZPT will:
- (i) link HNZPT properties with other **historic places** within the heritage landscape or related by themes
 - (ii) offer multiple or different narratives to reveal a full range of values, periods and perspectives and not obscure them
 - (iii) recognise the relationships of Māori and other groups with the place and its **heritage collections**
 - (iv) be in keeping with the atmosphere and intangible values of the place; and
 - (v) be provided in both English and te reo Māori where appropriate.
- 9.4** All interpretive work and activities at **historic places** managed by HNZPT will be guided by:
- (i) relevant research, assessment, plans and specifications; and
 - (ii) suitably qualified staff, technical and educational experts, interpreters and others in relevant fields.
- 9.5** HNZPT will explore opportunities to provide historical context to the **historic places** it manages by utilising and leveraging relevant documentary information available through other cultural heritage institutions.

- 9.6 The use of traditional Māori knowledge and te reo Māori in the interpretation of a historic place will be developed in consultation with and be endorsed by the appropriate whānau, hapū and iwi, and by other Māori with historical or cultural association with the place where relevant, and appropriate tikanga will be applied.
- 9.7 Persons or events of special or outstanding heritage significance directly associated with **historic places**, may be acknowledged by means of markers, plaques or **pouwhenua**, only where analysis indicates that this supports the **heritage values** of the place and its **setting**, is compatible with its **conservation** and is appropriate in the long term.
- 9.8 In the case of a historic reserve managed by HNZPT under the Reserves Act , any provision of displays and information for visitors requires the prior consent of the Minister of Conservation, and must be undertaken in accordance with a reserve management plan and section 58(b) of the Reserves Act .

RESEARCH

Historic places managed by HNZPT consist of historic buildings, heritage collections and objects, structures and archaeological sites that require specialist research and investigation for their conservation and interpretation.

OBJECTIVE 10: Research relating to **historic places** managed by HNZPT supports their **conservation** and interpretation.

POLICIES:

- 10.1** HNZPT will conduct research in relation to the **historic places** and **heritage collections** it manages to record their history, support their **conservation** and interpretation, and increase knowledge about New Zealand's historical and cultural heritage.
- 10.2** HNZPT should undertake research at **historic places** managed by HNZPT when:
- (i) it is necessary to provide information for **conservation** purposes, interpretation or **significance** assessment; or
 - (ii) a research opportunity arises in the context of other activities, works or uses.
- 10.3** Research by or sanctioned by HNZPT relating to traditional Māori knowledge of a **historic place** or **heritage collection** managed by HNZPT will involve and be guided by the appropriate whānau, hapū or iwi and other Māori interests with historical or cultural association where relevant.
- 10.4** Investigations of historic buildings, structures or **archaeological sites** at **historic places** managed by HNZPT may be carried out where they provide significant information in relation to the historical and cultural heritage of New Zealand where:
- (i) they do not destroy any more evidence than is necessary to meet the objectives of the investigation
 - (ii) the knowledge cannot be gained in any other way and the benefits outweigh any loss of historical or cultural heritage
 - (iii) they are consistent with any relevant plan
 - (iv) they are necessary for the purpose of **conservation**
 - (v) they are necessary to establish the existence of fabric of cultural **heritage value**
 - (vi) where relevant, be fully informed by appropriate whānau, hapū and iwi and other Māori having historical or cultural association with the place; or
 - (vii) where historical or cultural heritage is about to be damaged or destroyed or made inaccessible.
- 10.5** HNZPT will comply with the **archaeological authority** provisions of the HNZPTA in relation to archaeological impacts of research.
- 10.6** Research in relation to **historic places** and **heritage collections** managed by HNZPT should be published, promoted and used in the interpretation of the **historic place** by HNZPT where appropriate.

INFORMATION AND RECORDS

The recording and collecting of information relating to the **historic places** and their associated **heritage collections** that HNZPT manages is an ongoing process. This information and these records are important public documents that are stored and made available to property managers, researchers and the public.

OBJECTIVE 11: Relevant information and records support the **conservation** and interpretation of **historic places** managed by HNZPT.

POLICIES:

- 11.1** **Historic places** managed by HNZPT will be considered for inclusion in the New Zealand Heritage List/Rārangi Kōrero and where appropriate, the National Landmarks List/Ngā Manawhenua o Aotearoa me ōna Kōrero Tūturu, in accordance with Part 4 of the HNZPTA.
- 11.2** HNZPT will care for information, records and archival material relevant to **historic places** and **heritage collections** that it manages in accordance with relevant legislation and collection management guidelines.²²
- 11.3** Records and photographs will be taken prior to, during and following change or physical intervention, activities, works and uses at **historic places** managed by HNZPT.
- 11.4** Research reports and photographic records relevant to **historic places** managed by HNZPT will be placed in a suitable archive and made accessible to those managing the **historic place**.
- 11.5** Records of traditional Māori knowledge of **historic places** or **heritage collections** managed by HNZPT will be retained or used by HNZPT in accordance with protocols agreed with the appropriate whānau, hapū and iwi or the authorised custodian(s) of such knowledge.
- 11.6** HNZPT will maintain an accurate and up-to-date list of **historic places** to which this statement of general policy applies and make it available in its Annual Report.

²² Collection Management Principles, HNZPT, 2008.

HERITAGE COLLECTIONS

HNZPT manages **heritage collections** comprising approximately 70,000 collection items that relate directly to the **heritage values** and understanding of its **historic places**. These **heritage collections** contribute to public understanding of heritage through HNZPT's research, interpretation, educational activities and promotional work. They are heritage assets which extend or supplement the value of these **historic places** to New Zealanders. HNZPT provides guidelines for the care of its **heritage collections** in the Collection Management Principles guide.²³

OBJECTIVE 12: Relevant **heritage collections** and collection items support the interpretation of **historic places** managed by HNZPT and are cared for in an appropriate manner that protects their **heritage values**.

POLICIES:

- 12.1** HNZPT may acquire collection items which relate to a **historic place** managed by HNZPT in accordance with the following priorities:
- (i) the collection item is directly associated with the **historic place**; or
 - (ii) the collection item is directly relevant to a theme, aspect or period illustrated by the **historic place** or to people associated with the **historic place**.
- 12.2** HNZPT will care for and document **heritage collections** and collection items in accordance with relevant legislation, conventions, and charters. In the case of a newly found object, HNZPT will comply with the processes set out in the Protected Objects Act.
- 12.3** HNZPT will undertake a planned programme of collection improvements, including remedial collection item **conservation**, storage and display developments, and environmental and pest management to the extent possible within available resources.
- 12.4** HNZPT will endeavour to understand the provenance and ownership of each item in its **heritage collections** through research and documentation. HNZPT will have a planned programme to improve its collection documentation and documentation systems, including an electronic collection management system.
- 12.5** HNZPT will prepare and review guidelines for all aspects of the management of its **heritage collections** and collection items, including **acquisition**, disposal and loans, and act consistently with these guidelines.
- 12.6** Any Māori collection item (**taonga tūturu**) should be handled, stored, conserved, displayed and interpreted by HNZPT in accordance with terms or protocols agreed with the appropriate whānau, hapū and iwi, **owner** or authorised custodian of such items.

²³ Collection Management Principles, HNZPT, 2008.

- 12.7** HNZPT may dispose of any collection item where the following criteria apply:
- (i) the collection item does not contribute to the **significance** of a **historic place** managed by HNZPT and is not relevant to its interpretation; or
 - (ii) the **conservation**, storage, display or interpretation requirements of the collection item would be better met elsewhere; and
 - (iii) any relevant legal requirements, collections management procedures, terms of acceptance and commitments previously entered into by HNZPT in relation to the collection item have been complied with.
- 12.8** The **acquisition**, loan or disposal of any collection item by HNZPT will be made by resolution of the HNZPT Board or in accordance with any delegation by the Board.

ACQUISITION

Under the HNZPTA, HNZPT can accept **historic places** offered to it or purchase **historic places** for the purposes of **conservation** and public access. This method is reserved for the most significant heritage places, where financial resources allow, and where **acquisition** is necessary to protect the **heritage values** of the place and these values would not survive in private ownership. Any ownership or management option will be consistent, to the extent considered necessary, with the **conservation of heritage values** of the **historic place**.

OBJECTIVE 13: Decisions on the **acquisition of historic places** by HNZPT and their management arrangements are informed by robust assessments.

POLICIES:

- 13.1** HNZPT may acquire, have vested in it, or be appointed to control and manage, a **historic place** with, if appropriate, associated collection items, where the following criteria apply:
- (i) the **historic place** will fill a significant gap in the range of opportunities available for the public to have access to, understand and enjoy the heritage of New Zealand's diverse society and culture; or
 - (ii) the values, elements, condition and extent of the **historic place** demonstrates with credibility a significant aspect of the heritage of New Zealand; or
 - (iii) methods other than **acquisition**, vesting or control and management by HNZPT would be ineffective in preventing irreversible loss of **heritage value** and of public access and interpretation opportunity; and
 - (iv) financial resources are available to acquire or manage the **historic place**, together with any associated **heritage collection**, and to conserve, interpret and operate it effectively in the long term.
- 13.2** HNZPT may acquire additional land in the vicinity of a **historic place** already managed by HNZPT where the following criteria apply:
- (i) **acquisition** will enhance the completeness and credibility of the **historic place** and representation of its **heritage values**; or
 - (ii) **acquisition** will protect the **historic place** from threats, risks or adverse effects of development or **use** beyond the land already managed; or
 - (iii) **acquisition** will enable significantly enhanced **conservation**, interpretation and public appreciation of nationally important **heritage values**; or
 - (iv) **acquisition** will enable the provision of essential visitor facilities or services which cannot be provided within the land already managed or by the private sector; and
 - (v) financial resources are available to acquire the additional land and to **conserve** and manage it effectively.
- 13.3** The **acquisition** of real property or any interest in property will be by resolution of the HNZPT Board.

DISPOSAL

HNZPT has the ability under the HNZPTA to dispose or divest itself of **historic places** it manages, or seek alternative management arrangements for them. Any disposal, divestment or alternative management arrangement will be consistent, to the extent considered necessary, with the **conservation of heritage values**.

OBJECTIVE 14: Decisions on the disposal of **historic places** managed by HNZPT or the implementation of alternative management arrangements are informed by robust assessments.

POLICIES:

- 14.1** HNZPT may dispose of a **historic place** managed by it, or seek alternative management arrangements, where the following criteria apply:
- (i) the values, elements, condition and/or extent of the **historic place** are such that it is unable to demonstrate with credibility a significant aspect of the heritage of New Zealand; or
 - (ii) disposal of or alternative management arrangements for the **historic place** will not create a gap in the desired range of opportunities available for the public to understand and enjoy the heritage of New Zealand's diverse society and culture; or
 - (iii) the protection, **preservation, conservation** or interpretation requirements of the property will be better achieved by alternative management arrangements; or
 - (iv) any relevant legal and government requirements, including Settlement legislation, commitments previously entered into, or administrative and approval procedures in relation to the **historic place** have been addressed and/or complied with; and
 - (v) in the case of a reserve, by the decision of the Minister of Conservation.
- 14.2** Before the disposal of property, HNZPT will:
- (i) consider the above criteria, and all the relevant values and options, having regard to the provisions of any property management plan, conservation plan, collections management plan and/or reserve management plan
 - (ii) consider how HNZPT came to own or manage the place and any commitments entered into relating to the **acquisition**
 - (iii) consider **heritage collections** associated with the **historic place** and any compliance with donor agreements
 - (iv) consult with local communities, iwi and hapū and those with a known interest in the place
 - (v) consider ensuring the future long-term protection of the **heritage values** of the **historic place** by a legal mechanism such as a heritage covenant; and
 - (vi) consider ensuring the future long-term protection of any **heritage collection** and archives directly related to the historic property.
- 14.3** Any funds gained from the disposal of **historic places** managed by HNZPT will be reinvested in the heritage properties portfolio.
- 14.4** The disposal of real property or any interest in property will be by resolution of the HNZPT Board.

AGREEMENTS TRANSFERRING AN INTEREST IN REAL PROPERTY RIGHTS

HNZPT may enter into an agreement to transfer an interest in real property rights to individuals and organisations where there is a benefit to that **historic place** and the **heritage values** of the place continue to be conserved and appreciated through being managed by that individual or organisation.

Real property rights differ from the 'disposal' of properties HNZPT manages in that they give an individual or organisation a right with respect to the property. Examples of this include leases and easements such as for a right of access. These rights are binding and may exist for a specified time or in perpetuity.

OBJECTIVE 15: Any agreement transferring an interest in real property rights of a **historic place** managed by HNZPT is consistent with the **conservation** and interpretation of the **historic place**.

POLICIES:

- 15.1** HNZPT may enter into an agreement transferring an interest in real property rights of a **historic place** managed by HNZPT to an individual or organisation where:
- (i) **conservation**, interpretation, and/or public access, understanding and appreciation are maintained;
 - (ii) the transfer is consistent with this statement of general policy with particular reference to access and **use** of a **historic place**;
 - (iii) a **Heritage Impact Assessment** considering all the relevant values and options has been prepared, having regard to the provisions of any property management plan, conservation plan, collections management plan and/or reserve management plan; and
 - (iv) the requirements of the Reserves Act have been met.
- 15.2** In the case of a reserve for which HNZPT has been appointed to control and manage or has been vested in it, any agreement to transfer an interest in real property rights, such as an easement or lease, is subject to the prior consent of the Minister of Conservation and compliance with the relevant sections of the Reserves Act.²⁴
- 15.3** HNZPT will seek a concession, such as an easement or lease, from the Minister of Conservation before entering into an agreement to transfer an interest in real property rights for any reserve for which HNZPT has been appointed to control and manage.²⁵
- 15.4** HNZPT may enter into agreements transferring an interest in real property rights to **historic places** it manages to other groups including local authorities, corporations, societies, iwi and hapū, provided compliance with the Reserves Act and the Conservation Act is achieved.
- 15.5** The granting of any agreement transferring an interest in real property rights will be by resolution of the HNZPT Board and in the case of a reserve, the consent of the Minister of Conservation.

²⁴ Section 48, 54 and 58A of the Reserves Act 1977

²⁵ Section 59A of the Reserves Act 1977 and Part IIIB of the Conservation Act 1987.

GLOSSARY

Where the definition is derived from a statute, the relevant section in HNZPTA or other Act is given in brackets. Users are advised to check the most recent versions of these definitions in the relevant legislation in case there have been any amendments since the publication of this policy. Definitions marked with an asterisk are derived from the ICOMOS New Zealand Charter 2010.

Adaptation*	Means the process(es) of modifying a place for a compatible use while retaining cultural heritage values . Adaptation processes include alterations and additions.
Archaeological authority	An archaeological authority is a legal document, made under the HNZPTA, to enable any activity affecting an archaeological site to be undertaken.
Archaeological site	Archaeological site means - (a) any place in New Zealand, including any building or structure (or part of a building or structure), that (i) was associated with human activity that occurred before 1900 or is the site of the wreck of any vessel where the wreck occurred before 1900; and (ii) provides or may provide, through investigation by archaeological methods, evidence relating to the history of New Zealand; and (b) includes a site for which a declaration is made under section 43(1). [HNZPTA section 6]
Archaeological work	Archaeological work is any activity undertaken using archaeological methods required as a condition of an archaeological authority made under the HNZPTA.
Acquisition	In relation to this policy acquisition means to gain a property, collection or land through being purchased, being given, or being vested in to control and manage. This could include the transfer of Crown owned properties to HNZPT.
Chattels	Chattels are movable objects associated with a historic place , such as church pews, a grandfather clock or workshop tools. Chattels do not include items that are part of, and physically affixed to, a place.
Compatible use*	Compatible use means a use which is consistent with the cultural heritage value of a place and which has little or no adverse impact on its authenticity and integrity.
Conservation	Conservation includes the processes of preserving, maintaining and restoring historic places and historic areas so as to safeguard their historical and cultural values. [HNZPTA section 6]

Curtilage	Curtilage is the geographical area that provides the immediate physical context for a heritage place . Land title boundaries and heritage curtilages may not coincide. ²⁶
Heritage collections	Heritage collections comprise collection items directly related to the history and preservation of the heritage properties for which HNZPT is responsible. This may include three-dimensional artefacts, taonga Māori, natural history specimens, archives, artworks and photographs. The heritage collections represent evidence of the human and natural history of the sites to which they relate. They may also include architectural fragments.
Heritage Impact Assessment (HIA)	An objective assessment of the impact of any proposed adaptation , development, new construction or site alteration on the historical or cultural heritage values of a place. The assessment will include a study of the significance of the place, identify impacts of the proposed change, consider mitigation options, and make recommendations that best conserve the values of the place within the context of the proposed change. Where there is the potential to impact archaeological values an archaeological assessment may have to be provided as a separate document.
Heritage values/significance or historical and cultural heritage values/significance	Heritage values or significance includes aesthetic, archaeological, architectural, cultural, historical, scientific, social, spiritual, technological and traditional values. [HNZPTA section 66(1)]
Historic place	A historic place – (a) Means any of the following that forms part of the historical and cultural heritage of New Zealand and that lies within the territorial limits of New Zealand: (i) a land including an archaeological site or part of an archaeological site (ii) a building or structure (or part of a building or structure); or (iii) any combination of land, buildings, structures, or associated buildings or structures (or parts of buildings, structures, or associated buildings or structures); and (b) includes anything that is in or fixed to such land described in paragraph (a). [HNZPTA section 6]
Maintenance*	Maintenance means regular and ongoing protective care of a place to prevent deterioration and to retain its cultural heritage value.
Owner	An owner means (a) the owner of the fee simple estate in the relevant land; or (b) if there is no title to the land,- (i) the person in whom the land is vested; or (ii) the person who has responsibility under any enactment for the land. [HNZPTA section 6]
Person	A person includes the Crown, a corporation sole, and a body of persons, whether corporate or unincorporated. [HNZPTA section 6]
Pouwhenua	A pouwhenua is a post marker of ownership, boundary marker, land marker post, land symbol of support - post placed prominently in the ground to mark possession of an area or jurisdiction over it. (www.Māoridictionary.co.nz)
Preservation*	Preservation means to maintain a place with as little change as possible.

²⁶ Policy for Government departments' management of historic heritage, Wellington, Ministry for Culture and Heritage, 2004.

Reassembly*	Reassembly means to put existing, but disarticulated, parts of a structure back together.
Reconstruction*	Reconstruction means to build again as closely as possible to a documented earlier form, using new materials. Reconstructed elements should not usually constitute the majority of a place or structure.
Reinstatement*	Reinstatement means to put material components of a place, including the products of reassembly , back in position.
Repair*	Repair means to make good decayed or damaged fabric using identical, closely similar, or otherwise appropriate material.
Restoration*	Restoration means to return a place to a known earlier form, by reassembly and reinstatement , and/or by removal of elements that detract from its cultural heritage value.
Setting	Setting means the immediate or extended environment of a historic place that is part of or contributes to its heritage value or distinctive character and/or provides sufficient space to protect the historic place from the adverse effects of any adjacent activities, uses and encroachments. ²⁷
Site/historic place/historic area of interest to Māori	A site/historic place/historic area of interest to Māori is an archaeological site or other place or area in which an iwi or a hapū has, or at any time has had, an interest [HNZPTA section 6]
Stabilisation*	Stabilisation means the arrest or slowing of the processes of decay.
Taonga tūturu	A taonga tūturu is an object that: <ul style="list-style-type: none"> a. relates to Māori culture, history or society; and b. was, or appears to have been: <ul style="list-style-type: none"> i) manufactured or modified in New Zealand by Māori ii brought into New Zealand by Māori; or iii used by Māori; and c. is more than 50 years old. [Protected Objects Act Section 2]
Use*	Use means the functions of a place, and the activities and practices that may occur at the place. The functions, activities, and practices may in themselves be of cultural heritage value.
Wāhi tapu	A wāhi tapu is a place sacred to Māori in the traditional, spiritual, religious, ritual, or mythological sense. [HNZPTA section 6]
Wāhi tapu area	A wāhi tapu area is land that contains one or more wāhi tapu . [HNZPTA section 6]
Wāhi tūpuna	A wāhi tūpuna is a place important to Māori for its ancestral significance and associated cultural and traditional values, and a reference to wāhi tūpuna includes a reference, as the context requires, to <ul style="list-style-type: none"> (a) wāhi tūpuna (b) wāhi tupuna (c) wāhi tipuna [HNZPTA section 6]

²⁷ ICOMOS Xi'an Declaration on the Conservation and Setting of Heritage Structures, Sites and Areas (2005).

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