



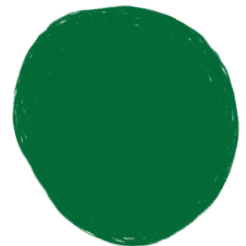
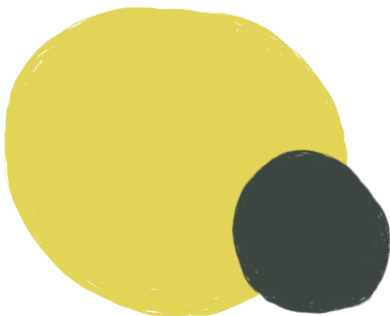
Waipu Museum

**Findings and recommendations arising from an option analysis of
future development of Waipu Museum strategic review**

Report for The Waipu Centennial Trust Board

CONFIDENTIAL

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Executive Summary

This report presents the findings of the option analysis for the development of Waipu Museum and offers recommendations to the Waipu Centennial Trust Board as to a way forward.

The Museum is a highly regarded and treasured place, with a unique story and archive, as reflected in the UNESCO inscription. Visitors report high levels of satisfaction and the Museum is well supported by many organisations, including Whangarei District Council. A high level of knowledge about the history, funding, governance and operating model of the Museum is assumed amongst the readers of this report.

The context in which the Museum operates was considered. The Museum aspires to remain in step with the changes that are occurring in Waipu and the surrounding region. Visitors to museums have evolving expectations of their experience; the Waipu team are clearly engaged with this and are seeking to respond. It is also interesting to note the developments in family history research; powered by digital technology and increased access to records, such as the Scottish Migration archive, interest globally is increasing. Achieving a sustainable position for the Museum is clearly vital. The potential of the Museum is great but there are relatively limited resources currently to achieve those ambitions. The Board is exploring options with partners for securing additional resources for capital and operational costs and is right to consider new means of income generation.

The options included for consideration in this report were: (1) extend the current building to both the rear and the front, referred to as the current scheme; (2) the Hammer Hardware option of a second building in addition to the existing Museum; (3) extend the current building to the rear only; (4) extend the current building to the front only; (5) and, do nothing. The latter three of these were ruled out for reasons described in this report. The aims and benefits of the Museum development have been clarified and consensus has been reached on many principles underpinning the project. These provide a strong foundation for future consideration of options.

The scheme to extend the Museum to the front and rear is described in the report as the current scheme. Notwithstanding the fact that an update to the brief is required, it is an exciting and viable proposal. This report finds that the current scheme would deliver very good value and would position the Museum well for longer term sustainability.

The idea of occupying the Hammer Hardware building alongside the Museum was unexpected and has opened up thinking to an unusual opportunity, particularly in relation to making the Museum relevant to a wider audience and to contributing something distinctive to Waipu. It is not without risk, however, and signals a significant change. This report finds that the Hammer Hardware option should be considered further, with an emphasis on accentuating its point of difference and generating income for the Museum.

Partnership working and community leadership opportunities for the Museum feature in both options presently; they do seem richer with the Hammer Hardware option, but this is most likely a question of description. The partnership and leadership dimensions of the current scheme could be drawn out more vividly.

The submissions and discussions in this process revealed a range of opinions and perspectives. In summary, there are essentially two schools of thought: focus on the core of the Museum and strengthen it in a careful and lower risk fashion; or, build on the core strength of the Museum in a bolder manner to create new territory. The latter is not specific to the Hammer Hardware building; it could be achieved through the current scheme. Both schools of thought make valid points and share a commitment to the long-term sustainability of the Museum. Both acknowledge the advantages and risks with the options on the table. Ultimately, shared ground could be found to accommodate both perspectives but what shouldn't be sacrificed is change and adaptation to survive.

As this point, it is not possible to say whether one option outweighs another as there are some significant information gaps, especially in relation to the Hammer Hardware building. It is therefore recommended that the Board develops both schemes slightly further and gathers the essential information needed for a strong preference to be determined. It would be advisable to move swiftly on the further exploration of the two options to reach a conclusion as quickly as possible. This can be further discussed once the Board has had chance to consider the findings and recommendations of this report.

As the plans progress, the practicalities of operations and costs will become clearer and any concerns or risks relating to operating two buildings (if this becomes the preference) can be addressed. That being said, the most important dimension of working out of two buildings is leadership and management to ensure that the spirit of one organisation is maintained. Some advice on the Heritage Precinct is offered, as it is another major project being considered at the same time as the Museum development. It is also not recommended as a solution to the space needs of the Museum.

The process demonstrated that there is a wide and engaged group of stakeholders who care about the Museum's future. Keeping the stakeholders informed and involved is essential, especially descendants, local community organisations and Whangarei District Council. Progressing discussions in an appropriate manner with the Patuharakeke Te Iwi Trust Board should be a priority. Their views on the Museum development are pertinent.

There is also a comment in the report on wider consultation with current and potential visitors, descendants and non-descendants alike. It would be prudent to plan for this consultation once the Board have a clearer view of the options but that doesn't stop the Museum from finding out more about the potential audience, their motivation and needs.

The Board has led a thorough and professional process to date and there is a clear commitment to further consultation. It is acknowledged that there is a loyal and committed group of people at the heart of the organisation, including staff, volunteers and Board members. Their contributions through this process have been invaluable. Those making submissions will value an ongoing process that is inclusive and transparent. Thanks are offered to all who have contributed in this process.

Recommendations

- That the Board considers the adoption of the principles underpinning the development project and enshrines them in the project plan (section 3.3)
- That the Board enshrines the goals for the development project in their planning as a solid foundation of the project and undertakes further work to articulate the benefits (section 3.3)

- That the Trust Board explores with the business community the opportunities for a partnership approach to the provision of food and beverage (section 5.4)
- That the Trust Board takes further advice on retail operations and how to maximise income in the both options and particularly in the two-building scenario (section 5.4)
- That the Trust Board (a) considers the advice that the Heritage Precinct is not a solution to the Museum's requirements for additional space and (b) reviews the Heritage Precinct project (in the context of the Museum development project) to ensure it is still justified and that the best approach to delivering it is in place (section 5.5)
- That the Trust should progress the current scheme to the next stage of development including deciding on the preferred solution for the front extension. An updated to the brief is advised (section 6.1)
- That the Trust includes in the preliminary cost estimate allowances for the following: digital / technology expertise and equipment; exhibition design (unless in house); equipment and fit out of learning space and family research centre; signage, internal and external; and, content development for new exhibition elements (section 6.1)
- That a further level of design work and cost estimate is undertaken on Hammer Hardware building option in order to be able to fully evaluate it (section 6.1)
- That a vision and brief for the Hammer Hardware building option is devised in order to enable a concept design and cost estimate to be developed (section 6.1)
- That, regardless of how the Board chooses to proceed, the matter of progressing the discussions in an appropriate manner with the Patuharakeke Te Iwi Trust Board should be a priority. Their views on the development options are pertinent (section 6.1)
- That the Museum develops a detailed brief for the family history centre, in such a way as it considers both the current scheme and the Hammer Hardware building option (section 6.1)
- That the Museum, in developing the brief for the Hammer Hardware option, creates a position statement on collections and if and how they might be accessed and displayed in the Hammer Hardware building and, if so, what conditions may be required (section 6.1)
- That the opportunities for stakeholder involvement in the current scheme are further developed and expressed (section 6.1)
- That the Board commits to an ambitious target to increase and diversify the visitation as an aim and a benefit of the development project (section 6.2)
- That the Board should progress with the consultation phase as proposed but shape it to address the information gap in the views of people beyond the immediate Museum family (section 6.2)

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1. Scene setting

Introduction

In February 2018, Sally Manuireva Consulting was appointed to assist the Waipu Centennial Trust Board (hereafter referred to as the Board) in evaluating options for the development of Waipu Museum.

This report presents the findings of the option analysis and offers recommendations as to a way forward and is written for the Board as commissioners of the work. It is assumed that, once it has been reviewed by the Board and any feedback incorporated, it will be available to others. Its distribution beyond the Board is a matter for the Board. A high level of knowledge about the history, funding, governance and operating model of the Museum is assumed and therefore this information is not included in detail.

Purpose and methodology

The purpose of this exercise was to assess the option for the development of Waipu Museum and to provide advice and recommendations to the Board accordingly.

The option considered are:

- Do nothing
- Extend the current building to the rear
- Extend the current building to the front
- Extend the current building to both the rear and the front, referred to as the current scheme
- Operate from two sites – the Hammer Hardware option

In order to be able to undertake an option analysis, the context in which Waipu Museum operates was researched. There was also a focus on the aspirations and the current reality for Waipu Museum. It was also important to clarify and articulate the options for Waipu Museum.

The process has included a review of key documents and information from a range of sources including websites, a summary of which is included in the reference list. The process also included meetings and a workshop with staff, volunteers, Board members and a selection of community representatives. Finally, there was an opportunity for submissions. A workshop held on 22 March 2018 that was entitled 'the aspirations, possibilities and long term needs of the Museum'. It was framed as being about ensuring that the Museum thrives and endures long into the future. It was not about the specifics of any location or solution.

Broader consultation with members of the public was not part of this process. It is noted that a commitment to consultation following this piece of work has been made by the Museum Board and this report offers some advice on this consultation.

Framing thoughts

There is a loyal and dedicated community of people surrounding the Museum, which is a strength. The Museum has a dynamic strategic plan, which sets the context for the development. With regards to progressing the development, the Board appears to have adopted a thorough and transparent process to date. The information created on the Museum extension option was solid and, when the Hammer Hardware option emerged, a logical suggestion of exploring the practicalities was proposed and the role of the working group was clear. A clear commitment was made to further consultation and there seems to be good evidence of partnership working. Given the options available to the Board, an independent person was brought in at that moment.

The report concurs with the Board on these points:

- That it is vital to establish the objectives of expansion and space needs so that an informed choice can be expressed (see section 3.3, figure 5)
- That further information is required on the viable options in order to complete a full assessment and for the Board to make a decision.

The following considerations have guided the approach to this task:

- That Waipu and the Museum has a unique and respected history. The ambition and the intention are to safeguard it for future generations.
- That the Museum has great ambitions but relatively limited resource available to achieve these dreams at present. The Museum is managed and operated by a small but dedicated group of staff and volunteers, including Board members.
- Collections and archives are valued highly as is the UNESCO inscription.
- The emotion surrounding the Museum development is tangible and understandable. People care deeply about preserving the legacy of the settlers and are passionate about sharing it more widely for future sustainability.
- Remaining financially sustainable is essential.

There appears to be consensus amongst those involved in this process on these points.

2. Context

This section describes Waipu Museum and the framework in which it operates. This forms the context for the options analysis. Basing the Museum's development plans on a deep understanding of the changing population of Waipu and the opportunities arising from tourism are essential. There is also a comment on the practice of genealogy and family history research, which continues to grow globally as a profession and a hobby, thanks in no small way to the development of digital access.

2.1 About Waipu

Waipu and Bream Bay are distinctive in the region and are growing as a gateway town. Waipu is identified as having significant potential to grow into an important population centre: "Known for its Scottish heritage reflected in the local 'sense of place', Waipu is surrounded by productive

landscapes and an attractive coastal hinterland. In recent years, growth has been reasonably rapid and this is projected to continue”¹.

The growth of Waipu is clear from the 2013 census:

- 1,671 people usually live in Waipu. This is an increase of 177 people, or 11.8 percent, since the 2006 Census.
- Waipu has 2.2 percent of Whangarei District's population.
- It has a higher than Whangarei District average of people aged 65 years and over and a lower than WD average of people under 15 years.
- The population is projected to reach 3,614 by 2041, and around 5,000 by 2061².

Whangarei District Council (WDC) sees Waipu worthy of investment and appears to be supportive of the Museum. Public consultation on WDC’s long term plan was underway at the time of writing this report and the Museum was in discussions with the Council as part of this process. It is right that the Museum continues to work closely with WDC.

2.2 Tourism

The value of tourism and its role as a driver of regional development is recognised; indeed, the recent announcement of the Provincial Growth Fund for Northland is an indicator of this³. Figure 1 shows the annual tourism spend (domestic and international) in Northland compared to Auckland and indicates that 76% of tourists to Northland are domestic, compared to 24% being international. Distinguishing between international and domestic tourists is essential in terms of the Museum offer and promotion. Collaborating with other tourism providers in the region and supporting regional development initiatives is vital.

Figure 1: Annual tourism data					
Region	Annual tourism spend – total	Annual tourism spend – domestic	Annual tourism spend – international	Percentage of domestic tourists	Percentage of international tourists
Auckland	\$8,286m	\$3,042m	\$4,344m	37%	53%
Northland	\$1,112m	\$851m	\$262m	76%	24%

Source: MBIE, January 2018

2.3 About Waipu Museum

The Museum was established in 1953 to honour and preserve the memory and story of the Nova Scotian Scots migration (Figure 2 for information on the organisation). The Waipu Centennial Trust Board Deed is the founding document and is supported by the Trust Board Policies and Procedures. The Museum was expanded in 2003 and its practice has evolved to become more of a cultural hub for the community and an information centre. The strategic plan highlights the Board’s focus since 2015 as being ‘framing the next steps for the Museum development’. It also identifies the importance of remaining relevant to the growing and changing communities of Waipu and Bream

¹ WDC growth strategy

² 2013 Census

³ Source: <http://www.northlandnz.com/news/2018/new-provincial-growth-fund-a-win-for-northland>

Bay, both the community of descendants of the Nova Scotian settlers, and the community that lives in the area.

As the communities of Waipu and Bream Bay change, the Museum must remain in step with that change. Indeed, the Museum has an opportunity to play a community leadership role in that change.

Figure 2: Waipu Museum organisational dashboard	
Foundation	In 1953, the Waipu Museum began as the House of Memories, built to honour and preserve the story of the Nova Scotian Scots migration to Waipu.
Constitution	The Museum was established under the Waipu Centennial Trust Deed
Core Purpose	To preserve and present the heritage of Waipu; highlight the double migration from the Scottish Highlands to Nova Scotia and then to New Zealand; and develop the genealogical records of the Nova Scotian settlers and other Waipu residents.
Vision	A community that is proud of, and enriched by, its heritage; a place where history and culture are celebrated and make the township a more attractive place to live in and to visit.
Visitors (*1)	43,291 overall visitors (2) 7,239 Museum Visitors (3) 241 School children visits 123 Children participating in holiday programs 6,833 Events attendance (4) 98% Visitor satisfaction
Board	Comprised of ten elected trustees. See Board Policies and Procedures
Staff	Museum Manager appointed by the Trust Board and others
Volunteers	109 volunteers = 8.2FTE * 16,744 Hours per year of volunteer contribution
Collection	6,204 Collection objects uploaded to Mosaic Collections database * 5,057 UNESCO Memory of the World listed documentary heritage items 107,000 people on the Museum's Legacy genealogy database (5)
<p>NOTES:</p> <p>(1) Items marked * were sourced from the February 2018 Friends newsletter, a section entitled '2017 snapshot'</p> <p>(2) Figures based on the door counter, includes entry into the shop and those accessing genealogist services and adjusted for staff and volunteer entry. Not verified as part of this process.</p> <p>(3) i.e. paying into the exhibition</p> <p>(4) includes Art n'Tartan and World of Art</p> <p>(5) More details in the aforementioned newsletter</p>	

Waipu Museum Visitation

As Figure 3 illustrates, the Museum saw a growth in local visitors between 2016/18 and 2017/18. The potential to attract more visitors is very significant; the museum has a small number of visitors but they clearly have a very high quality visit and that is a strong basis on which to build. The proportion of local visitors is very low and the Board is absolutely right in seeking to grow the local audience. Apart from anything else, they can be strong advocates and promoters.

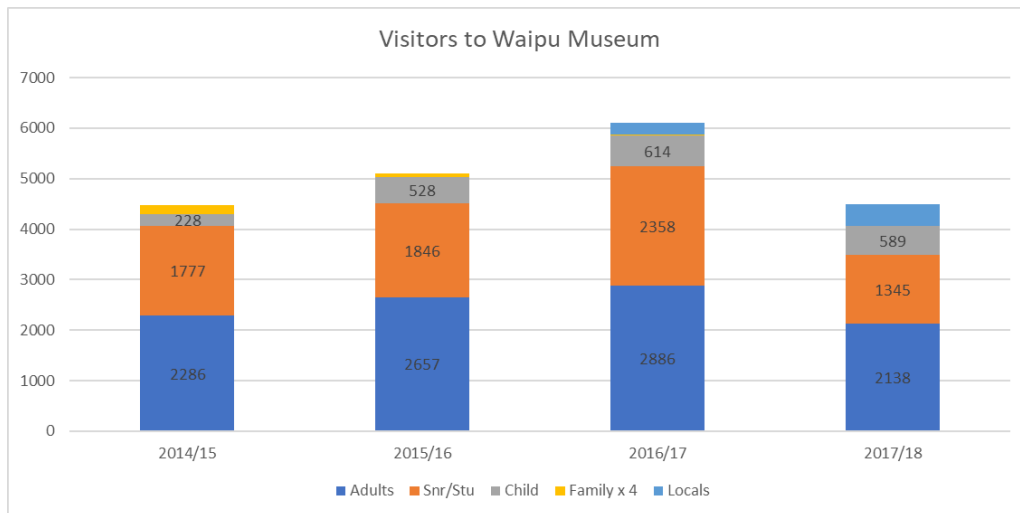


Figure 3: Visitor figures 2014/15 – 2017/18 (latter year, partial)

There was some useful anecdotal information on visitor behaviour in one of the sets of notes provided from staff. It has been slightly amended for use here and is purely contextual, and would require validation:

- *Primary visitors are international and domestic visitors. They will pay to see the exhibition and have a propensity to spend in the shop. They usually rate their visit highly and are likely to recommend it. Offering refreshments would extend their experience.*
- *There is a predominance of visitors who come for information on the area and do not necessarily purchase from the shop or enter the paid exhibition.*
- *The growing threat to physical information centres from mobile usage is that people, especially young people, are more likely to go online to find out information and plan their trips.*
- *There is an expectation amongst many visitors of free Wifi and a place to use it whilst having a coffee or relaxing in a lounge-like area.*
- *Summer visitors include families and young people, who are looking for a more participatory experience, such as a heritage trail around Waipu. Some New Zealanders do visit the area more than once and therefore a changing element to the Museum might attract them back on more than one occasion⁴.*

Increasing visitor numbers, including the proportion of local visitors, is vital to achieving sustainability. Looking at the strategic priorities, there is an implied rather than overt reference to increasing visitor numbers. The question of the Board’s preparedness to commit to an explicit and ambitious target of visitor growth, which would in turn warrant a bold development project, is raised in section 6.2.

⁴ Source: notes provided by a member of staff, anecdotal

2.4 Genealogy

“Genealogy is the retrieval of vital and familial data from records of various types, and its ordering into meaningful relationship patterns. It involves, at least, the discovery and proof of vital data (names, dates, places of birth, marriage, death events), plus surrounding and contextual information—occupations, migration events, other socio-geographical data found in censuses, testamentary details and so on ... As a methodology, genealogy depends on the existence or primary sources—official and other records of vital and other events such as court cases, deeds etc. —or where these do not exist, reliable substitutes.”⁵

The same article from which this definition is sourced also makes the point that interest in genealogy as a hobby continues to grow worldwide, and that it is increasingly becoming a profession in its own right. Digital access to records and online communities of researchers have driven this growth to a large extent and now on the horizon, another disrupter, digital DNA: *“Genetic Genealogy attempts to place individuals within family, ethnic and geographical groupings by analysis of DNA and its expression. This is true citizen-science, and the world of academic genetics, having initially dismissed it as a form of stamp-collecting or astrology, is only slowly catching up.”⁶*

The value of the Scottish Migration archive for descendants and researchers is proven and undisputed. As noted in section 4, the efforts of the current and past genealogists were commended by many in this process; their services and skills are clearly valued and recognised. There is an intent to increase access to the archive at the Museum and online, thanks in part to the UNESCO recognition, and this is endorsed.

Through this process, there has also been a discussion about the potential of a family history centre. The picture is one of an inviting and dynamic place, where those with a range of research enquiries – from the introductory, general interest to the specialist, academic – can be accommodated. This seems to be a timely development for the Museum, as there are so much interest and resources available. A search of the term ‘family history research’ reveals a wealth of sources of assistance. For example, the National Library of New Zealand provides ‘guides to’ and access to records and the New Zealand Society of Genealogists support local groups and has a family history research centre in Auckland.

This brief comment on genealogy and family history is intended to demonstrate that the opportunity to grow interest in the archive is significant and that involving other organisations who have an interest in genealogy would be a fruitful way forward. The Museum staff and genealogists will be able to add depth to this discussion.

⁵ Source: *Genealogy* 2017, 1(1), 4; What Is Genealogy? Philosophy, Education, Motivations and Future Prospects

⁶ IBID

3. The story so far and the options

This section briefly describes the background to the development project and the options considered in this report. The principles underpinning all the options and the goals of the development project are described. The benefits of the goals have been added and could be developed further to make the case for investment. In section 5, the degree to which each option delivers on the goals is analysed.

3.1 Background to the development project

Figure 4 provides a timeline of key moments and documents relating to the proposed development of the Waipu Museum. The discussions date back to 2014, when concept drawings were produced for extensions to the building. These have been further developed since that date and cost estimates produced. Appendix 3 is a summary of the brief to which the architect responded at that time.

There are three significant milestones in this timeline that strengthen the case for the development project: the UNESCO inscription, the development of Board policies and the completion of the Strategic Plan. These are achievements that distinguish Waipu Museum and position the organisation strongly for embarking on a major project.

The timeline shows a commitment on the part of the Board to seek expert assistance where required (such as on retail and earthquake strengthening). There is also evidence of a willingness to invite input, notably through the working group in October 2017 and, indeed, this process.

The emergence of the Hammer Hardware building option in July 2017 caused the Board to stand back and evaluate all options objectively. The work undertaken until this point places the Museum in a strong position to be able to make informed choices.

Figure 4: Timeline relating to the proposed development

2014	Board was discussing an extension to the Museum and exploring funding sources
2014-2016	Building extensions Committee formed sometime during this period
July 2016	Brief from the Board to the architect, True Space, for extensions to the rear and front of the Museum True Space provided a response and developed concept drawings to that brief
25 May 2016	Waipu Museum Trust Board Policies and Procedures approved; title, "Governance Policy"
August 2016	Submission for UNESCO inscription for the Scottish Migration Collection (successful)
Nov 2016	Hawthorn and Geddes provided a Seismic Assessment report
Jan 2017	Indicative cost estimates (<i>See Strategic Priorities 2017 – 2025 document</i>)
March 2017	Waipu Centennial Trust Board, Strategic Priorities 2017 – 2025 published Du Rand retail report received
May 2017	True Space developed second set of concept drawings for three options on extensions to the rear and front of the Museum

July 2017	The Hammer Hardware store option emerges and was outlined to the Board in August 2017. It was agreed to explore it further alongside existing scenarios
October 2017	Working group established to explore how a two-site option might work. The WG consisted of fourteen members made up of Board members (seven), members of staff, volunteer genealogists, and members of the community.
Dec 2017	Board report on the outcomes of the working group
Feb 2018	Independent consultant appointed Opportunity of funding from Provincial Growth fund arose

3.2 Summary of the option

In summary, the five options outlined for consideration in the brief for this piece of work were:

- Do nothing (not analysed)
- Extend the current building to the rear only
- Extend the current building to the front only
- Extend the current building to both the rear and the front, described as the current scheme
- Operate from two sites – the Hammer Hardware option

The two major options – the current scheme and the Hammer Hardware site – are described in more detail in appendix 2. For the current site, the work to date has been on extensions to the front and back. The brief for this was developed in 2016 and architectural designs produced in response. Appendix 3 includes a summary of the brief from that time. In contrast, there has been no formal brief for the Hammer Hardware option and no design work undertaken. The focus instead has been on considering how the two-site option might work.

The *'do nothing'* option is not a true option. There is a clear argument for and a commitment to action in the Strategic Plan and, for this reason, *'do nothing'* is not explored in any detail in this report. To *do nothing* would undermine the future sustainability of the Museum.

With all options, it is assumed that a retail space is required. The question of a café or catering facilities has emerged in the process. Both are considered further in section 5.

3.3 Principles, goals and benefits of the development project

These can be thought of as 'stakes in the ground' and should be read alongside the strategic framework (appendix 1). There is consensus on these points:

- The original House of Memories is the heart of the organisation.
- One organisation, regardless of number of buildings / locations or where the Museum is active
- One seamless visitor experience, regardless of number of buildings / locations or where the Museum is active
- Maximise income; constrain operating expenditure
- Avoid being overly prescriptive on functions in spaces. Instead, allow for future flexibility. The needs of the Museum and the community will continue to change.

It is also recommended that the Board adopts the following principles:

- Achieve appropriate environmental conditions in the required areas to meet standards for collections management. The Museum team is well placed to advise on this principle.
- Ensure an appropriate level of flexibility and future capacity in the building design to ensure sustainability, especially in relation to changes in technology, visitor needs and ways of working. This is a matter for discussion with the architect.

Recommendation: that the Board considers the adoption of the principles underpinning the development project (section 3.3) and enshrines them in the project plan

During the process of the workshop, we discussed the goals of the development project. The goals are essentially ‘what will be delivered’ – practical, physical and concrete things. The group reached a level of consensus on the goals and feedback was provided by workshop participants⁷. Taking into account the feedback, the goals have been refined and structured in relation to the long-term objectives of the Museum⁸ (Figure 5). Furthermore, the benefits of the goals (if realised) have been suggested. These could be developed further to make the case for investment.

Recommendation: that the Board enshrines the goals for the development project in their planning (section 3.3) as a solid foundation of the project and undertakes further work to articulate the benefits.

A selection of interesting comments on the goals

Workshop participants made a range of interesting comments that add depth to the goals. A full record of the workshop is available. Here are a few highlights:

- For developing relevance to and engagement with the community of Waipu, specific ideas included: more interpretation boards such as the WW1 boards, information in DOC camps, at beaches and in other community places. Mention was also made of the “Heartery concept”, where the Museum could be at the centre of placemaking. The sense of the Museum as a hub from which other activity grows including inspiring the streetscape, was supported. This is certainly part of the vision to be developed.
- Drawing on and preserving the heritage of and spirit of Waipu settlers is important with themes such as co-operation, ingenuity and community.
- The importance of a school programme, public events and changing, seasonal exhibitions was emphasised. These ideas would benefit from further development in due course.
- For being an information centre, think next generation “I-Site” (or “E-site” for electronic information and e-charging etc)!
- In terms of genealogy and research, it was acknowledged that ‘research’ is a spectrum of types and depth of research, from general enquiries to deep academic research and all in between (see section 4.4 also).

⁷ Reference: workshop notes

⁸ Long term objectives, as described in the Strategic Plan

Figure 5: Goals of the development project and benefits

Long term objective	Goal	Benefit
To be financially sustainable	Provide space and profile for retail and ticketing	To sustain income generation
	Create facilities and opportunities for appropriate income generation activities, including but not limited to events, donations and sponsorship	To create new ways of generating income
	Provide visitor facilities including the arrival experience and group gathering space WCs	To ensure that Museum visitors have a quality experience and repeat visit / recommend / support the Museum
	Provide improved staff facilities in an area separate from public space	To ensure a good employee experience
	Create facilities for volunteers	To sustain and grow the volunteer workforce
To preserve, exhibit and promote artefacts, culture and stories relating to the history of the Scottish settlement of Waipu, including the original “House of Memories” stone building.	Protect and make the best use of the existing building and the site on which it is located	To ensure a strong base from which the Museum flourishes
	Maintain and enhance the permanent migration exhibition	To honour the history of Scottish settlement
	Rationalise and improve access to storage space for collections and archives and for non-collection material	To increase usage and ensure collection care standards met
To preserve and expand the genealogical records of the settlers and engage and communicate with successive generations of descendants of the Nova Scotian migrants.	Being an information centre for the region and for family research including digital access	To improve visitor experience and to increase access to the Museum
	Increase and improve the space for Genealogists including a library and quiet space for research	To increase access to and usage of the archives

Figure 5 continued: Goals of the development project and benefits		
Long term objective	Goal	Benefit
To expand and enrich the museum's exhibitions and activities, reflecting the stories of tangata whenua and other peoples and cultures in the community	Work in partnership with local Iwi and researchers to incorporate stories of Māori and the relationships between the settlers and mana whenua	To exercise cultural responsibility, to increase relevance and engagement and to improve the visitor experience
	Create an education/public programme space for learning programmes, public workshops and events	To grow the numbers of children, families and community groups engaging with the Museum
To ensure the museum's relevance to new generations in a changing community	Create space for new and broader stories of Waipu and for changing exhibitions	To grow and diversify Museum visitation
	Invest in 'Digital Waipu Museum' including: the website as an information portal; the visitor information centre with digital access; use of social media and apps; providing free WIFI access; and online genealogy enquiries	To increase access, awareness and engagement

4. The views and opinions expressed in this process

This section reflects the views consulted in this process, which were considered in the evaluation of the options. There are many points of consensus, which is positive. There are also some points which divide opinion, and these are highlighted. It is also noted – and endorsed – that further consultation is planned by the Trust Board.

4.1 Overview

Submissions were encouraged as part of this process. A total of 6 submissions were received, on behalf of 9 people. 4 of those submissions were emails. All those making a submission did so in a positive spirit and, where possible, face to face discussions also took place.

Two of the submissions (representing the views of 5 people in total) stated that they were writing from the position as descendants and observed that they were speaking for a greater number of people.

Some points that were made in the submissions are covered elsewhere in this report and therefore are not repeated here. For example, one described the nature of the collection, the expectations and restrictions relating to the UNESCO inscription, all of which are on public record.

4.2 Points of agreement

The following is a summary of the points on which those making a submission concur. In the workshop that was held, there was evidence of agreement on these points also. Where there is a divergence of views, it is identified.

Future prosperity and development priorities

- That the Museum should thrive and endure long into the future.
- That financial sustainability is vital and that the organisation currently operates on a lean resource base and that any development and expansion of activity should take this into account. This is a framing assumption for this review.
- There is consensus that the Museum should continue to evolve and seek to be relevant to the changing Waipu community and do so from its solid foundation of the settler story. There are different views on how this could be achieved. There are some differing views of the Museum's current and future roles in the Waipu community.
- One of the submissions endorsed the stated goal to develop new and broader stories of Waipu, including stories of Māori and relationships between them and settlers. The stated intention to do this in partnership with the Patuharakeke Te Iwi Trust Board was also endorsed. A specific recommendation was made to ensure that Patuharakeke has a presence on the Board in an appropriate manner.
- That more space is required for staff, volunteers, researchers and a range of activities and that internal space to Museum can be improved particularly to benefit the visitor experience, as people exit the exhibition and re-enter the gift shop.
- That Museum projects and activities (such as changing exhibitions) can create wider interest in the Museum activities and act as vehicles for community engagement. The submissions made suggestions for exhibitions and projects, acknowledging the value of a changing

exhibition programme. These suggestions must be viewed through a lens of audience interest, which is not particularly the case in the submissions.

Preserving and respecting the origins of the Museum

- That the Waipu Museum building (original and extension), collection, story and genealogy should be treasured and preserved.
- That the origin story of the initial settlement should remain central to the Museum.
- Some people in this process have expressed a view that the collection – especially that which has UNESCO recognition - the story and genealogy should remain in one building.
- That the House of Memories remains as a memorial to the pioneers and their descendants. Indeed, this is a project aim.
- There is sensitivity around the treatment of the stone building and a concern about how the Hammer Hardware building (if progressed) is treated in relation to the original stone building.
- A submission advocated for growing the collection around wider migration and Waipu stories (in line with the Collecting Policy) whilst maintaining the integrity of the migration collection in line with UNESCO expectations.
- In terms of the collection, in one submission, reference is made to ICOM and UNESCO as professional bodies which govern, amongst other things, standards of collection care. The submission goes on to say that Waipu Board members should have the collection's best interest at heart and act responsibly. There has been no evidence in this process of the Board not understanding the obligations or indeed of doing anything which is irresponsible.

4.3 The development options

Most of those submitting made comment on the options in one form or another. The views have been incorporated into the option analysis. In summary:

- There is an indication that the proposed extension to the rear of the building was well-supported.
- There is interest in the potential of the Heritage Precinct. One submission made suggestions on the possible use of the buildings for Museum activity. Some see the Heritage Precinct it as a possible solution to the Museum's current space challenges; others do not.
- Some see the Hammer Hardware option as a rare opportunity for the Museum to be seized. Others do not. Concern has been expressed about the liability of the building to flooding. Having spoken with Board members about this, it is clear that they are aware of this concern and intend to take all due steps – if they proceed – to understand and mitigate any risk.
- Submissions also commented on the option for extending to the front and rear. One submission expressed a clear preference for extending to the rear. Although not adverse to improving the entry experience, the submission clearly wishes that little be done to alter the original stone building at the front. They also commented on the shop and visitor facilities, which have been incorporated into the option analysis.
- Some are not supportive of the Museum having a café because of concerns that it is beyond the Museum's expertise and that it could adversely impact on other operators. Others are

keen to explore food and beverage provision as they see it as vital to the customer experience, although not necessarily run by the Museum directly.

4.4 Genealogy and family history research

- That the Museum is a unique resource and that the database is valued by a community of researchers. The efforts of the current and past genealogists were commended by many; their services and skills are clearly valued and recognised.
- The majority of people throughout the process feel that the value of the database and the Museum as a place for research could be developed further, without undermining its integrity. Most of the people observed that the Museum has greater potential than is currently being realised.
- That the genealogy database is not extended to include anyone not connected to the migration by birth or marriage, as stated in the UNESCO inscription. One person suggested that, in order to expand its genealogical work, the Museum maintains two databases (so that the migration records retain integrity).
- An experienced genealogist advocated for increasing the reach of the genealogy services provided by Waipu Museum although noting that this is a professional and time-consuming activity, requiring particular skills and experience. Partnerships with other genealogy services / interest groups and the library has been suggested by people. It was also suggested that a team of volunteers be formed to do the genealogy of the wider community so as not to place too great a demand on the existing volunteers. In light of the ambitions for the family research centre, the Board could consider seeking the input of one of the national genealogy organisations alongside the deep expertise of the Waipu genealogists.

5. Evaluation of the options

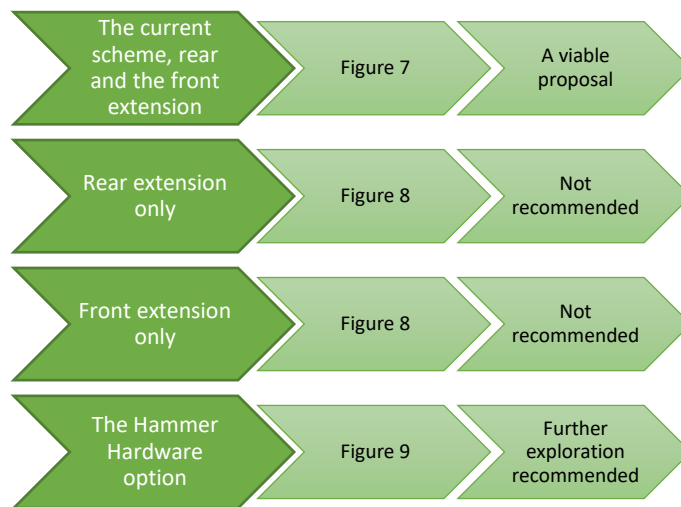
This section builds on the context and background and submission to evaluate the options. The methodology utilised is described and the findings of the analysis shared. There are some comments on practical consideration, such as staff and volunteers, retail and food and beverage. This leads to section 6, the key findings and recommendations.

5.1 Methodology

The criteria for analysis is set out in figure 6. The analysis is somewhat restricted as the options are at different stages of development. The proposal for the Hammer Hardware option has not reached the same level of design and costing as the current scheme, the comparison is not like for like. In order to be able to make a true comparison, a design to the same level as the current scheme is advisable, as noted later in the report.

Figure 6: Criteria for analysis
Long term objectives for the Museum
Benefits and outcomes. Taking into account the means of achieving those long-term objectives
Other considerations: Costs; People; Operational practicalities
Issues and risk and their mitigation
Information gaps

The approach to evaluating the option was to review each one against the criteria. The detailed analysis of each option is included in appendix 5. The diagram below explains how the overview of findings is presented.



5.2 Overarching comments

The rear of the Museum needs improving, and the land could be used more effectively. The staff accommodation is unsuitable, including the lean-to office, and the house and container is unsightly. The old gaol is due to be relocated alongside the other heritage building. The case for removing the existing buildings at the rear of the building and using the space differently is strong.

The case for adding to the front (whilst protecting the building) and opening up the street presence of the building is strong. An extension to the front should be with the purpose of increasing the visual impact of the Museum and improving the visitor experience. If there is a question about the validity of this, it would be valuable to undertake some survey work to understand perceptions of the building better. For the unfamiliar people, how visible is the building currently? Are they aware and tempted to visit?

The opportunity presented by the Hammer Hardware building option is quite different to the option of extending the existing building. It is new, neutral territory, which potentially allows something more adventurous. If it were to be pursued, it would seem like a wasted opportunity to merely replicate what would be done in the current scheme. Instead, the opportunity is to be bolder and more innovative, if that aligns with the Board's aspirations.

A Museum operating out of two buildings. It is not unusual for a museum or heritage institution to operate out of more than one place. Often collections are stored in other places, but it is also true of other functions. If the additional building is pursued, the Board may wish to seek advice from organisations with this experience of two or more building. Visitors to both sites would be counted and a methodology incorporated for eliminating double counting. One figure would be provided to WDC and other stakeholders if requested. There is of course a risk that people may not visit both buildings. This could reduce usage of anything located in the other building (genealogy, retail, exhibitions, programmes etc) which in turn could impact adversely on income. Retaining a sense of one organisation in two buildings is about strong management, practical operational matters, such as where staff are based, procedures and, most importantly leadership and a strong culture.

5.3 Overview of the findings of the option analysis

The current scheme: As Figure 7 demonstrates, the analysis confirms that the current scheme is a viable proposal. It is the most advanced in terms of design and cost. There are design concepts for the front extension to be discussed further. If the Trust Board were not to progress the Hammer Hardware option further, they have a very compelling current scheme to take to the next stage. The recommendations are section 6.1.

Figure 7: Evaluation of the current scheme, front and rear extension

The scheme that is most advanced (in design and costing terms) is the front and rear extension and is most easily analysed presently. With this scheme – at this stage – the aims of the development project are well met and the project maximises on the existing site. There is good logic in utilising the land to the rear of the existing Museum. The rear of the building, which is unsightly and unsuitable is dealt with in this scheme. The case for adding to and expanding the permanent migration story is strong.

The architect has offered a selection of design concepts for the **front of the building**. These demonstrate a sensitivity to the original building and, although they are at an early stage, they offer a range of solutions that are workable. The glass front extension offers the benefit of a covered entrance area, a group space, an inviting street presence, and space for a more contemporary information centre with WiFi. In progressing with a decision on the concepts for the front, it is important to consider a design that is sympathetic to the existing building, that creates a good sense of arrival and street front visibility and is practical. A good balance of glazing and solid building is advised; too much glazing makes a space more difficult to use for retail display and museum objects.

It is noted that there are stakeholders who have concerns about an addition to the existing building. There is a balance to be found between preserving the building frontage and opening it up the building to increase access and awareness. Additions to heritage buildings are very commonplace and, by working with the architect, it should be entirely feasible to devise a solution that achieves both preservation and enhancement of the original building and increased visibility and access. The earthquake strengthening also will be taken into account as the design progress.

With regards to the **internal space in the current scheme**, the following observations are offered:

- The requirement for a larger retail space should be considered more fully. The increased street front visibility may be sufficient to deliver the increase in income required and offers the benefit of not increasing the cost of goods sold to any great extent. The architect should be briefed to design the entry and visitor information / retail areas with a degree of flexibility, so that usage could be adapted in the future.
- The ideas for the visitor information and family research function have been described very vividly. They are less evident in the scheme, which is partly a function of the design stage. However, it is vital to write a strong brief for these functions in order that the architect can deliver the spaces that are required.
- There seems to be a high level of provision of staff offices and meeting rooms. It would be prudent to check if these are all required and if they are more important than space for

public engagement. If it is the intention to sub-lease one of these office spaces, then the level of provision makes sense.

With regards to the **preliminary cost estimate** for current scheme, there doesn't seem to be an allowance for the following. It would be prudent to include an appropriate allowance in the budget.

- Digital / technology expertise and equipment
- Exhibition design (unless in house)
- Equipment and fit out of learning space and family research centre
- Signage, internal and external
- Content development for new exhibition elements (researcher, images, writer etc)

Rear and front extension: The analysis leads to the conclusion that, although the rear of the building must be addressed to remove the unsightly and unsuitable buildings, the rear extension alone is not recommended (Figure 8). Similarly, the front extension alone is not recommended, although the case for some treatment to the front of the building in order increase visibility and to connect the Museum more strongly to the street is strong (Figure 8).

Figure 8: Evaluation of the rear extension alone and the front extension alone

The rear of the building must be addressed to remove the unsightly and unsuitable buildings. However, the analysis shows that a **rear extension alone** does not meet the aims of the development project. The rear extension alone is not recommended as an option.

If the decision was to progress with the rear extension alone, the following is advised:

- Review the brief, identify the most important things and take some less important items out and then redesign the interior space.
- Include an initiative to address street front visibility
- Plan outreach projects to increase access and reach new audiences. These are likely to require greater operating budgets / separate operating funding.

If the Hammer Hardware option is pursued, the existing building to the rear of the Museum must be removed and some landscaping undertaken to improve the quality of the space. As the space required for staff would be provided in the new building, this should be entirely feasible. The cost should be included in the Hammer Hardware option.

The analysis shows that a **front extension alone** does not meet the aims of the development project. The front extension alone is not recommended as an option. Nevertheless, some treatment to the front of the building is essential in order increase visibility and to connect the Museum more strongly to the street.

If the Hammer Hardware option is pursued, then this could be through signage and landscaping, and as part of a scheme to connect the two buildings. The cost should be included in the Hammer Hardware option.

Hammer Hardware option: Figure 9 presents the analysis of the Hammer Hardware option. It concludes that is a proposal worthy of being further explored. It requires a distinct brief and design response. It has the potential to be a very different proposition to the current scheme; indeed, the opportunities and risks are quite distinct. If the Trust Board were to progress the Hammer Hardware option, some works to the rear and front of the building and a linkage between the current Museum and Hammer Hardware building are recommended. These are costs to be assessed and taken into consideration. The recommendations are section 6.1.

Figure 9: Evaluation of the Hammer Hardware option

There is no brief or design response at this point for the building as the focus has been on practical, operational considerations. Nevertheless, the image that has been conjured (through reading written documents and face to face conversations) is a vivid one. The opportunity for the Museum is do something quite different in this building compared to the existing one, although entirely related and connected. This option is potentially stronger on cultural responsibility, innovation, community engagement and access. In briefing an architect, the design treatment should be sympathetic to the environment; a nod to the heritage of the original building but a contemporary take on it, enhancing the original Museum building without mimicking it.

A new building would really need to offer the benefit of greater income streams for it to be justified. Providing space in a new building for new income generating activities is feasible, such as subleased office space, a shared work space, a food and beverage capability. These may also come with increased operating costs however, such as more staffing. It is suggested that the Board decide on the level of importance of creating new opportunities for income generation, as this is a distinctive feature of this proposal. With the Hammer Hardware building option, some work is still required to the existing building, and those costs are to be taken into account. The question of WDC's interest in providing capital for the new building and increased opex is to be explored.

The Hammer Hardware option appears to offer the opportunity for a range of different bodies combine together for greater joint benefit. This is likely to appeal to WDC as a stakeholder and gives other organisations an opportunity to be involved. There is the consideration of whether to buy, lease or rent the building. Although this has not been explored in any detail, the ideal scenario for the Museum is either full ownership or WDC ownership with guaranteed long-term tenure at a peppercorn rental. The Board have stated that this is a discussion for the next stage, if they decide to progress the option further.

Another building / location and retain existing building

There is the possibility that, if Hammer Hardware is not a viable option, the Museum may be able to have a high street presence through a more temporary / pop up experience in another building. There is always the possibility that another building on the high street may become available if Hammer Hardware were not, but this is not considered as likely at this stage. However, providing interpretation on the central street or at other venues (as with the World War One boards) or having another form of presence through events or temporary displays is always to be commended and is clearly supported by the Museum staff.

5.4 Practical considerations

People

Any expansion of operations will require more people (paid staff and volunteers). Furthermore, different skills and expertise on staff and the Board are likely to be required. It is noted that the Museum currently has a temporary member of staff to manage volunteers; this is highly desirable to continue, to manage the growth and diversification of the volunteer workforce. This tends to be an area that is highly attractive to funders.

Finally, all options require a resource – ideally a member of staff - for public engagement including learning programme, depending on the scale of ambition. Digital expertise would be a bonus on staff and on the Board. These details will emerge as plans are progressed.

Food & beverage provision and retail

The question of whether to have a café or not is a fair one and should not be ruled out of either scenario as it is very important to the visitor experience. If the Board were to include a café, this could best be achieved in partnership with the business community, leased out and with a strong point of difference. Alternatively, there could be space provided for a mobile food/coffee truck or a pop-up provider on high days and holidays. If catering for events is important, an appropriate level of facility / capability is required.

The retail offer is aimed at two different audience: tourists and the local population. It is reported that there has been a focus on promoting the shop to local people. The clear advantage of the Hammer Hardware building is that it is a high street location, increasing visibility and presence for retail. However, a presence on the High Street might indeed require a different approach to staffing and management. Professional advice on the split location and how to optimise on retail should be sought. In this scenario, an incentive to go to the shop after visiting the original building could be offered. It should remain co-located with the information function.

The size of the retail space in either scenario should be assessed at the next stage in order to ensure an appropriate balance between greater income, the cost of investment and increased operational costs. Investment in an online retail space may return financial reward and there appears to be untapped potential with existing customers to increase spend before space is increased.

Recommendations:

- That the Trust Board explores with the business community the opportunities for a partnership approach to the provision of food and beverage.
- That the Trust Board takes further advice on retail operations and how to maximise income in the both options and particularly in the two-building scenario.

A comment on digital development and technology

These are priorities in the Museum's strategic plan and both are strong ways of connecting with a larger and more diverse audience. It is difficult on the basis of current plans to make an assessment of the strength of the plans in relation to digital and technology. This will become easier as plans develop. A separate recommendation has been made to include an allowance in the budget for digital and ICT.

5.5 The Heritage Precinct project

This is identified as a long-standing priority for the Board⁹ and is a major project to be delivered with other partnership organisations. It includes a range of heritage buildings, with some in current usage, on land owned by WDC. Museum staff report that conservation needs assessment is underway.

The vision for this project is: “... a place that is a vibrant hub for community activity, with a walkway knitting together the river, the Novia Scotia Estate, the Heritage Precinct and The Centre”¹⁰.

This project is part of the context for the options analysis. There have been comments during the consultation that the spaces in the heritage buildings could be used for the museum events, exhibitions learning, thereby addressing the Museum space challenge. It has also been noted that the intention is to make the spaces, once fit for use, available for community hire.

In terms of positioning, the Heritage Precinct connects most strongly with the Museum’s objectives around the past and not the future. Whilst it is important to protect the heritage buildings and noting the likely to appeal to those with an interest in heritage, the Heritage Precinct project is unlikely to assist the Museum in expanding its activity and increasing contemporary relevance to new generations.

Based on this consideration and the author’s knowledge of the existing buildings, the view is that they are not appropriate as primary spaces for the specialist museum functions of events, exhibitions and school programming. Whilst they may be used on occasions for some of those activity, it is unlikely that the expected level of infrastructure (security, technology, lighting, accessibility, environment etc) can be achieved. It is recommended that the Board rules out the use of the Heritage Precinct as a solution to the space needs of the Museum. There is also the question of the Museum’s capacity to deliver the Heritage Precinct project, especially if in addition to the Museum development project.

It remains prudent for the Board the gather information about the buildings and the (a) heritage value and (b) conservation / preservation needs (now and future) and (c) potential future use and any costs relating to enabling use and maintaining them. It would also be useful to assess the level of demand for community space rental in Waipu including the current availability.

If the Board does progress with the Museum development project, it is recommended that they review the justification for and approach to delivery of the heritage precinct. Essentially, in the light of the opportunity to expand the museum (regardless of which option is pursued), does the Heritage Precinct project still make sense as proposed and is the Museum the best placed organisation to take this project forward?

Recommendation:

- That the Trust Board (a) considers the advice that the Heritage Precinct is not a solution to the Museum’s requirements for additional space and (b) reviews the Heritage Precinct project (in the context of the Museum development project) to ensure it is still justified and that the best approach to delivering it is in place.

⁹ Reference: Strategic Priorities document

¹⁰ Strategic Priorities document p.24

6. Recommendations

6.1 Progressing the current scheme and the Hammer Hardware building option

Having discounted the rear and front extensions alone, the option analysis concludes that the current scheme, the front and rear extension, is a strong and viable proposal. The Trust should settle on the preferred scheme for the front extension and take this design to the next stage of development. Whilst acknowledging that the Hammer Hardware building option has divided opinion, the evidence from the analysis is that it should be explored further in parallel with further development of the current scheme.

The vision for the Hammer Hardware option would benefit from being refined further. A new building on the high street could be positioned as the gateway to the Museum, including a taster of what is on offer in the original Museum building, as well as community space for locals and a place to show relevant material from places outside Waipu. The current Museum building would remain as heart of the settler story and a source of information on the Nova Scotia Scots migration. But that is the starting point and the Museum offer should evolve and grow from there.

The Working Group undertook some good work on how operation between two buildings might work. They also developed two scenarios on how the two buildings could be used. The differences between the two scenarios are quite subtle but they do share a commitment to integrating wider stories of Waipu, including Māori stories. The approach to incorporating Māori stories must be discussed and determined with local Iwi and therefore this is recommended as a point for consultation. On this point, it is important to retain an open mind on this until that consultation has taken place.

Recommendations:

- That the Trust should progress the current scheme to the next stage of development including deciding on the preferred solution for the front extension. An update to the brief is advised.
- That the Trust includes in the preliminary cost estimate allowances for the following: digital / technology expertise and equipment; exhibition design (unless in house); equipment and fit out of learning space and family research centre; signage, internal and external; and, content development for new exhibition elements.
- That a further level of design work and cost estimate is undertaken Hammer Hardware building option in order to be able to fully evaluate it.
- That a vision and brief for the Hammer Hardware building option is devised in order to enable a concept design and cost estimate to be developed.
- That, regardless of how the Board chooses to proceed, the matter of progressing the discussions in an appropriate manner with the Patuharakeke Te Iwi Trust Board should be a priority. Their views on the development options are pertinent.

The idea of a family history centre

As noted sections 2.4 and 4.4, there was support for this throughout the process and a vivid description of an engaging, inviting genealogy centre emerged. This is in some places referred to as the Nova Scotian Family History centre. A key decision is whether the family history centre is just for descendants or not (i.e. a wider audience)? The research and analysis indicate that the potential is wider than this, building on the strength of the archive. Succession planning for the existing genealogists is essential as others have said on this process. A future development must have a strong digital element and a larger group of volunteers, partners and resources would be required. This could be developed over time.

Recommendation:

- That the Museum develops a detailed brief for the family history centre, in such a way as it considers both options (current scheme and Hammer Hardware building option).

Collections

A point for discussion with the Hammer Hardware building option is the location of collections. Some have expressed the view that all collections should remain together in the existing Museum building and this is a valid suggestion for storage. However, for public access, it would be ideal to create the conditions for collection display in the new building (if only temporary display) and to plan this into the thinking for the new space.

Recommendation:

- That the Museum, in developing the brief for the Hammer Hardware option, creates a position statement on collections and if and how they might be accessed and displayed in the Hammer Hardware building and, if so, what conditions may be required.

Stakeholders

The workshop provided a valuable opportunity to consider the needs and expectations of a range of stakeholders, including descendants, schools, the Business Association and other societies, for example. Encouraging all involved to adopt a wider stakeholder view is important.

WDC appear to be interested in a project where different bodies combine for greater joint benefit. The Hammer Hardware option offers this more strongly at this stage. The opportunity to work with WDC on this is a rare one and should be pursued. It is important to achieve clarity with them of their expectations and to their level of commitment (including to existing and future operational funding). It would be valuable to consider how the current scheme could be strong on partnerships and deliver value to key stakeholders in the same way that Hammer Hardware might.

Recommendations:

- That the Trust progress the idea of an MOU between the key partners for the Hammer Hardware option, as would provide a more solid foundation on which to explore the scenario.
- That the opportunities for stakeholder involvement in the current scheme are further developed and expressed.

6.2 Visitors

Section 2.3 identifies the importance of increasing and diversifying visitor numbers i.e. those who go beyond the shop. The absence of the voices of local, potential visitors has been felt in this analysis. It would be illuminating to know what people beyond the immediate circle of Museum would say about the options. It is reasonable to assume that they might mirror the feedback already received to a degree. However, those who have never accessed the Museum are likely to have quite different opinions.

The discussion about visitors has tended largely to be divided by descendant / non-descendant and by geography. This is certainly one way to consider the audience. It is also usual for museums to segment the visitors by their different motivations and needs to plan the products and services offered. It is quite a specialised activity to develop such audience segmentation, but at its most simple, the Museum may wish to consider the segmentation set out in Figure 10.

Figure 10: Visitor segmentation	
Audience by geography	
•	Waipu residents who interested in cultural activity. They may/may not be descendants and they may/may not be interested in genealogy (yet). They are likely to be proud of Waipu Museum and will promote a museum visit to others.
•	Regional residents
•	Visitors to Waipu (domestic and international tourists), potentially visiting friends and family.
Audience by motivation and needs	
•	Those with a research interest, including descendants, and family members, local school and college students, academics, scholars, and whether living in Waipu, in other parts of NZ or overseas (including Scotland and Cape Breton). They will travel to and contact the Museum with enquiries and research needs. They may at the outset of their enquiry or very deep into their genealogical research.
•	Those seeking entertainment and participation in an event, such as the Highland Games.
•	Those who are interested in creative, expressive activities, often the arts and heritage, community minded – like Art n’ Tartan.
•	Those who are interested in discovering Waipu and the wider area.

Adopting a more nuanced approach to audience segmentation will help the Museum plan more precisely. Achieving a greater understanding of the motivations and needs of current and potential visitors, the barriers that may prevent them from using the Museum and the things which attract them, will aid the Museum in making decisions of this nature. Rather than leap straight into asking about options, a survey or series of open days to find out more about what people think in general terms about the Museum and their future use of it is recommended.

Recommendations:

- That the Board commits to an ambitious target to increase and diversity the visitation as an aim and a benefit of the development project.
- That the Board should progress with the consultation phase as proposed but to shape it to address the information gap in the views of people beyond the immediate Museum family.

6.3 The role and responsibilities of the Waipu Centennial Trust Board

Three questions were raised during the submission process that are not strictly within the scope of this report but on which a comment is offered.

One was whether another organisation should be created to be responsible for new elements, including any extension into a new building and the Heritage Precinct? This is not within the scope of this report. However, it is preferable to keep governance structures as simple as possible and to avoid an increase in governance overheads. The expansion of Museum activity, even across the road, appears to be entirely in line with the purpose of the Centennial Trust. As to the Heritage Precinct and setting aside questions raised in this report about the viability of that project, form should follow function. Once that project is clarified, a view can be taken on the most effective governance and management mechanism.

The second was whether the Trust Deed is fit for purpose or should be reviewed? The current Trust Deed, as the constitutional document, should be read alongside other documents (including Governance Policies adopted in May 2016 and the Strategic Priorities 2017-2025 document). The combination of these documents appears to provide for the activity which is proposed and do not appear to be restricting the Trust in its activities. As part of good governance, the Trust may wish to schedule a review at a point in the future, but this at their discretion and is a matter on which they may seek their own advice.

The third was whether a fund could be established to support on-going operations, especially for education and outreach projects, to which the answer is 'yes'. Although it is more challenging to secure funding for core operational costs, community and learning projects are attractive to funders. The Museum development plans offer a range of opportunities for fundraising and there is good precedent amongst similar organisations of success in this area.

6.4 Concluding comment

It is the Board's stated intent to explore aspects of the Museum expansion in more detail at the next stage and to do so in an open and transparent manner. A transparent approach to this would be supported by those who have made a submission. It should also be noted that the Board has a responsibility to undertake its duties and that this may mean that, at some points, Board members will be privy to information before non-Board members. This is appropriate process.

Regardless of location, the opportunity for the Museum has been articulated very strongly. That opportunity is to reach a larger and more diverse audience, to have an embedded Māori dimension including through a partnership approach with the Patuharakeke Te Iwi Trust Board, to be more of an information centre for Waipu and the region, to help make the Waipu central street more appealing and to inspire more people interested in their genealogy. Even if a building development isn't progressed, it is right that the Board drives for those to thrive.

Reference list

Provided by Museum

- Waipu Centennial Trust Board Deed, 30 April 1990
- Waipu Museum Trust Board Policies and Procedures, May 2016
<https://www.waipumuseum.com/html/documents/1.WaipuCentennialTrustBoardGovernancepolicyFINALMay2016.pdf>
- Waipu Museum collection policy, March 2015 (available on website)
- Waipu Centennial Trust Board, Strategic Priorities 2017-2025, May 2017 (available on website)
- Visitor statistics, 2014 /15 – 2017/18
- Annual accounts year ending March 2017
- Annual returns to Charities Service Year ending March 2016 and March 2017
- Budget 2018-19 DRAFT
- Funding register and calendar
- UNESCO inscription and expectations, submission document, 2016
 - <http://www.unescomow.org.nz/new-zealand-register/browse> Who Else?
 - <http://www.unescomow.org.nz/helpful-links> Care of collections

Board Reports

- Building (Committee) report, Jan 2017 – earthquake (prepared by David Moon, covers: preliminary seismic assessment; retail area expansion; preferred options on type and extent of extension; appointment of architect (True Space)
- Board report October 2017 - prepared by K.Thomas: “Waipu Museum building extensions – State of Play”, a summary of steps taken/information gathered by the old board re extensions - not necessarily comprehensive but a starting point;
- Board report December 2017- prepared by K.Thomas: report back from working group;

Workshops documents

- Workshop notes (workshop 2, 5th Dec & 3, 13th Dec)
- “Thoughts” Peter Couper, Simon Johnson and Fiona Mohr

Architectural design work, costings and other expert input documents

- True Space, 2016 – July design brief
- True Space concept drawings 2016
- True Space concept drawings May 2017, further options for front extension - concept drawing for three options - A, B, and C - for extensions to the front);
- Cost estimate Jan 2017, indicative costings - David Moon - for the True Space plan above p.27 of strategic priorities booklet
- Hawthorn and Geddes, Seismic Assessment report, 9 Nov 2016
- Du Rand, retail evaluation, Jean Du Rand Report - Retail expert evaluating the benefits of increased retail space, visibility from the street, and the addition of a café
- Waipu Museum - Waipu Business & Community Inc, Vision statement
- Process Chart

Sourced information

- Census 2013 stats

- Whangarei Growth Strategy, Whangarei District Council. Section on Waipu - <http://www.wdc.govt.nz/PlansPoliciesandBylaws/Plans/SustainableFutures/Final-Strategy/Pages/default.aspx>
- LTP consultation document, Whangarei District Council- <http://www.wdc.govt.nz/PlansPoliciesandBylaws/Plans/LTCCP/Documents/2018-2028-Long-Term-Plan-Consultation.pdf>
<https://www.aim-museums.co.uk/aim-hallmarks/>
- Report, 2014, "Giving New Zealand": commissioned by Philanthropy NZ, a snapshot of giving <http://philanthropy.org.nz/wp-content/uploads/2016/03/Giving-New-Zealand-2014-1.pdf>
- New Zealand Society of Genealogists: <https://www.genealogy.org.nz/>

Appendix 1: Strategic Framework

Vision statement

Our vision is a community that is proud of, and enriched by, its heritage; a place where history and culture are celebrated and make the township a more attractive place to live in and to visit.

Source: Trust Board governance policy and strategic plan

Imagining our future: Strategic drivers

- How long do we want to be here? A vision for the next 50 years
- Waipu's place in the region as a gateway town
- Collaboration with other organisations
- Growing, changing communities – the challenge to be relevant
- The museum's role in contributing to Waipu as a distinctive community
- Liveability of the community
- Moving from our colonial origins
- Expanded use of technology

Long-term objectives

- To be financially sustainable.
- To preserve, exhibit and promote artefacts, culture and stories relating to the history of the Scottish settlement of Waipu, including the original "House of Memories" stone building.
- To preserve and expand the genealogical records of the settlers and engage and communicate with successive generations of descendants of the Nova Scotian migrants.
- To expand and enrich the museum's exhibitions and activities, reflecting the stories of tangata whenua and other peoples and cultures in the community.
- To ensure the museum's relevance to new generations in a changing community.

In order to achieve them the Board will:

- Exercise cultural responsibility,
- Drive innovation and learn from other museums,
- Maintain an audience focus,
- Place a priority on community engagement and digital development, and further the Museum's practice of being accessible beyond its walls

Strategic priorities 2017-2025

- Meeting the obligations of UNESCO inscription and maximizing on the opportunities it presents
- Developing the Heritage Precinct, including the old Manse and settlement era buildings
- Expansion of the Museum building
- Securing the future of Art 'n Tartan
- Achieving financial sustainability

Appendix 2: Summary of the options

July 2016, brief to True Space
<p>The brief to True Space in July 2016 included the following requirements¹¹:</p> <ul style="list-style-type: none">• Maximise the site coverage without invoking a major Resource Consent. A building design that triggers a minor Resource Consent issue would be considered, stated the brief.• Assumption that the Museum will not be required to provide more car parking• Include the earthquake strengthening required to the original stone building built around 1953• Do not include the walkway to the Heritage Precinct but do include the walkway/driveway to the rear boundary of the site• Retail is to extend across the frontage of the Museum, to have a prominent aspect to promote the shop to the public, as well as the entrance to the Museum. Improved visitor information space and front of house services.• Improves spaces for geneologists and family history research• Rear extension to maximise area available for an exhibition area and collections and exhibitions storage storage• Provision of education space and new visitor facilities• Mezzanine floor for staff facilities• Provide a second level (either above the retail area or to the rear) for a small office space that could be rented to provide an income to the museum.• With the front extension, a request for a building that has architectural merit, rather than a commercial building.• An indication that the construction could be phased: front first and earthquake strengthening as stage one and rear extension as stage two.
January 2017, cost estimate
<p>A preliminary estimate for the extension of \$2,440,290 (excluding GST) was provided (dated 16 Jan 2017) and is included in the Centennial Trust Board, Strategic Priorities 2017-2025 document.</p>
March 2017, enshrined in strategic plan
<p>This scheme is further described in the Centennial Trust Board, Strategic Priorities 2017-2025 document as including:</p> <ul style="list-style-type: none">• Visitor interpretation and orientation centre within an expanded front section of the Museum• Increased revenue from retail through a greater street frontage presence• Expanded school programme to meet demand through more space for groups• Diverse activities to attract the local community through a multi-functional gallery
May 2017, further design work
<p>True Space offered three solutions:</p> <ul style="list-style-type: none">• Concept A: An expanded entry form also allowing for the display of some of the larger items the museum holds. Picking up on the classical forms and materials already found in the building, with a pronounced entry form and glass walls allowing views of the interior• Concept B: A modern insertion on one side only, not designed to mimic or replicate any of the forms or materials, instead aiming to be light and transparent, and allow clear views into and through its glass and steel form• Concept C: A bold addition across the entire front face, one that greatly expands the footprint, and allows for the creation of a unique new architectural form for the museum.

¹¹ Reference: letter to architect dated 14.07.16 from Building Sub-Committee

The presented solution reflects on some of the key icons for the settler community, sailing ships, the ocean, religion.

A fourth possible option was identified but not drawn, grafting the roofline for Option C onto Option A

Hammer Hardware Building and retain existing building

There is no brief or design response at this point for the building as the focus has been on practical, operational considerations. Nevertheless, the image that has been conjured (through reading written documents and face to face conversations) is a vivid one.

The working group generated two scenarios:

Scenario One: The existing museum is the centre for the Nova Scotian migration story, and early settlement, and the centre for descendants and genealogy with plenty of room for both the permanent exhibition and genealogy to expand. The HH site is the centre for contemporary story telling; wider visitor and local community engagement.

Scenario Two: The existing museum becomes a centre for genealogy, in depth research and learning, possibly known as the Nova Scotian Family History Centre. The HH building becomes a “New Museum” with all exhibitions being integrated on this site. This scenario prioritises integrated story-telling about Waipu, whilst still protecting the migration story, and allows Maori stories to be incorporated into the history of Waipu. Provides an opportunity to spin off other stories from the Nova Scotian story – think a series of galleries that develop themes/stories.

The possibility of the layout of the new building has been described as:

- A zone at the front / entry to the building that includes retail and visitor information centre and which has vistas / entry into the park. Staff and / or volunteers available in this area to meet, greet and serve customers. Covered seating area (internal / external space onto the park), with Wifi access and potentially food and beverage provision.
- A changing exhibition space and events space with entry / exit into the shop area.
- Museum storage and staff facilities at the rear or indeed in a mezzanine with the potential to create office space for rental to earn income.
- Architectural treatment to the front of the building which is sympathetic to the original Museum.

Partnership with the Caledonian Society is central to this scenario, as is a wider heritage interpretation experience around Waipu centre.

Appendix 3: Brief to Architect mid-2016

NOTE: this is summarised by S.Manuireva from documents and reflects the discussions in 2016. It does not take account of subsequent discussions (workshops and so forth). In order to explore further the current scheme (as recommended in the report), an updated brief would be required.

Outside building, arrival and the building structure

1. Maximise existing site coverage, avoiding resource consent requirement
2. Ensure buildings comply with standards for earthquake strengthening
3. Create a walkway/driveway to the rear Boundary of the existing site (relevant to existing site)
4. Retain entrance to the museum and shop from the road and car park

Entry into the building and welcome / ticketing area and visitor facilities

5. Introduce a visitor interpretation, information and orientation centre
6. Extend retail area and create a street front presence *Detail in architect's letter*
7. Create a small office space (c.10 m²) in front of house area
8. Create a retail store/workroom in front of house area (c.15 m²)
9. Create a cafe? (perhaps only relevant to HH building)
10. Retain existing toilets and create new toilets on the ground floor

Public Engagement

11. Create an education/public programmes (promotion?) area *Detail in architect's letter*
12. Create a "kids' curator corner"
13. Establish a multi-functional Gallery
14. Create space (within multifunctional gallery) for temporary displays, changing exhibitions, events
15. Increase exhibition space including storage and preparatory room (repeat of bullet above)

Collections and family history research

16. Expand archives room
17. Retain office for Waipu Informal Genealogy Group
18. Create an office for the Descendants Research and Genealogy Group (six workstations, large worktable, filing and storage)

Back of house

19. Create/increase Administration space *Detail in architect's letter*
20. (if feasible) create additional office space, which could be rented out

Appendix 4: Stakeholders

Definition: A stakeholder is anybody who can affect or is affected by an organisation, strategy or project. They can be internal or external and regardless of position in society or within an organisation

The list of stakeholders below was developed with participants in the workshop (in no particular order):

- The community of descendants of the Nova Scotian settlers
- The community that lives in Waipu and Bream Bay
- Volunteers
- Staff
- Researchers (academic, students and others)
- Waipu Caledonian Society
- The Park Trust
- Mana whenua
- Waipu clubs and societies
- Museum funders and supporters
- Whangarei District Council
- Northland Council
- Waipu and Bream Bay Primary Schools and other schools
- Churches including Waipu Presbyterian Church and other in the area
- Waipu Library
- Waipu Business Association
- RSA
- Farmers
- Northland Inc
- Accommodation providers and tourism operators
- Gaelic College, Nova Scotia
- UNESCO World Heritage
- Other heritage organisations including Heritage New Zealand
- Northland Museums Association
- Te Papa

In groups, we talked about these stakeholders and their particular 'stakes' in the development of the Museum. The notes below are verbatim from each group's flip chart sheets:

Organisation	Stake
Descendants	Supportive of the Museum development providing the migration story is preserved and enhanced. Ability to research family history and to receive guidance / support and use digital options. Primary focus must be descendants story; other things can go around this.

Community of Waipu / non-descendants	Want a welcome to the Museum not a sense of exclusion. People want to be included, make it a place for people. Story has no personal meaning / relevance and Museum perceived as a bit insular / inward looking. Everyone is an immigrant and so wants a sense of inclusion. The descendant / non-descendant divide may be mythical.
Mana Whenua	Must be relevant to them and not recognised or visible, such as stories of the landscape. Would like to see their stories included in the Museum of Waipu and would like to be part of the process of uncovering the heritage of Waipu – part of the settlement of Waipu. Want their encounter / mixed heritage stories told. If the process is right, will engage in the Museum’s goals.
Waipu Caledonian Society	Support the Museum to survive. Work together. Protect the Museum and heritage of Waipu. Include the stories of the Callies in the Museum. Idea of a “Pocket Park” by the Celtic Barn of interest to both as it improves the streetscape of Waipu
Waipu Library	Co-operates and contributes to the Museum where possible
Gaelic College	Keen to see the Museum thrive
Business and community Inc	Common aspirations, sees Museum as a leader of Waipu, setting tone and culture, will support the Museum
Schools	Would appreciate a space for programmes and events, such as theatres, and changing exhibitions which they can relate to through the curriculum. Work with schools to establish what is of interest. Use a wide range of storytelling techniques.
Whangarei District Council and Northland Council	Interested in funding sustainability, Museum reflecting the community and being a community hub and meeting community obligations.
Churches	Focused on preserving the church’s role in the community, assisting the integration of new residents. Being a good neighbour. Working together to enhance the “liveability” of the area; interested in the museum providing heritage expertise
UNESCO World Heritage	Interested in the Museum achieving the national standard. Digital access and intellectual access is particularly important. Vital that the Museum acknowledges the listing.

Appendix 5: Detailed analysis of the options

NOTE: assessment based on the designs dating 2017

List of tables

Table 1: the criteria for analysis

Table 2: analysis of the rear extension alone option

Table 3: analysis of the front extension alone option

Table 4: analysis of the front and rear extension option (referred to as the current scheme)

Table 5: analysis of the Hammer Hardware option

Table 1: the criteria for analysis
Contribution to Museum purpose and vision
Long term objectives for the Museum, which are: <ul style="list-style-type: none">○ To be financially sustainable (<i>shorthand in table – Financially Sustainable</i>)○ To preserve, exhibit and promote artefacts, culture and stories relating to the history of the Scottish settlement of Waipu, including the original “House of Memories” stone building (<i>shorthand in table – Scottish Settlement</i>)○ To preserve and expand the genealogical records of the settlers and engage and communicate with successive generations of descendants of the Nova Scotian migrants (<i>shorthand in table – genealogical records</i>)○ To expand and enrich the museum’s exhibitions and activities, reflecting the stories of tangata whenua and other peoples and cultures in the community (<i>shorthand in table – exhibitions and activities</i>)○ To ensure the museum’s relevance to new generations in a changing community (<i>shorthand in table – museum relevance</i>)
Benefits and outcomes, taking into account the means of achieving those Long term objectives. The means are: <ul style="list-style-type: none">○ exercise cultural responsibility○ drive innovation and learn from other museums○ maintain an audience focus○ place a priority on community engagement and digital development, and

<ul style="list-style-type: none">○ further the Museum's practice of being accessible beyond its walls
<p>Other considerations:</p> <ul style="list-style-type: none">○ Costs○ People○ Operational practicalities
<p>Risk and their mitigation including:</p> <ul style="list-style-type: none">○ Stakeholders○ Cost○ Capacity and capability○ Reputation
<p>Information gaps:</p> <ul style="list-style-type: none">○ Space requirements○ Costs○ Operational considerations○ Earthquake strengthening on the HH building

Table 2: analysis of the rear extension alone option		
Long term objectives	Alignment	Comment
Financially sustainable	Low	The cost of the rear extension alone is likely to be lower than the front alone and lower than the combined front and rear extension. However, based on the current design, the rear extension does not address all the aims of the project. In particular, there is no improvement to the street front visibility, the visitor entry experience and the retail area. This is likely to undermine income generation and hence the assessment is low.
Scottish Settlement	Medium	'Preserve is strong but 'promote and exhibit' is limited as street front presence not increased.
Genealogical records	Low	The expanded collections storage and new facilities for genealogy are not in the rear extension and therefore are not provided.
Exhibitions and activities	Medium	New exhibition and programming space is created.
Museum relevance	Low	Reaching new audiences would be constrained by the focus on the rear of the building. No significant change signalled to new audiences.
Benefits and outcomes	Medium	Cultural responsibility – could be addressed in new exhibition and programming spaces; drive innovation – opportunity limited; audience focus – predominant focus appears to be on growing current audience and not reaching new audiences; community engagement – possible through the exhibition space; digital development – difficult to assess in all cases but Museum has made a commitment to this; further the Museum's practice of being accessible – yes but limited within confines of current practice.
Other considerations		
Costs	Unknown. Not designed or costed as a separate project. Staffing costs constrained but operational costs of projects (such as outreach) to address the shortfalls of the project may be higher.	
People	Constrains the increase people requirement somewhat.	
Operational practicalities	Remains one building.	
Risk and mitigation	Street front presence not improved so risk is that the visibility and awareness is not increased. A temporary feature could be added to the frontage, such as a sculpture, or garden with stronger signage to mitigate this risk. New audiences not reached.	
Information gaps	Design and cost of rear extension alone. Not recommended as an option to be progressed.	

Table 3: analysis of the front extension alone option

Long term objectives	Alignment	Comment
Financially sustainable	Low	Improve retail visibility and therefore optimise income. Front alone does not provide spaces for other museum activities, which in turn undermines Museum sustainability
Scottish Settlement	Low	Addition to front will significantly increase awareness and access which is positive. Otherwise, the alignment is deemed to be low.
Genealogical records	Low	Limited new facilities proposed; makes limited impact on the current lack of space for family research and staff / volunteer facilities.
Exhibitions and activities	Very low	New space created for entry and improved visitor experience on arrival. Otherwise, no space for exhibitions and events.
Museum relevance	Very low	Limited opportunity to be innovative, reach new audiences or to develop new practice.
Benefits and outcomes	Low	Cultural responsibility – could be addressed by adding content to permanent exhibition but limited; drive innovation – opportunity very limited; audience focus – predominant focus appears to be on growing current audience and not reaching new audiences; community engagement – very limited as space not provided; digital development – difficult to assess in all cases but Museum has made a commitment to this; further the Museum’s practice of being accessible – very limited.
Other considerations		
Costs	Unknown. Not designed or costed as a separate project. Staffing costs constrained but operational costs of projects (such as outreach) to address the shortfalls of the project may be higher.	
People	Constrains any increase people requirement.	
Operational practicalities	Remains one building.	
Risk and mitigation	The risk is that a wide range of the aims of the Museum development project are not delivered and therefore the Museum’s sustainability it not addressed.	
Information gaps	Design and cost of front extension alone. Not recommended as an option to be progressed.	

Table 4: analysis of the front and rear extension option (referred to as the current scheme)		
Long term objectives	Alignment	Comment
Financially sustainable	High	Improves retail visibility and therefore optimises income.
Scottish Settlement	High	Addition to front will significantly awareness and access which is positive. 'Preserves, promotes and exhibits' are strong.
Genealogical records	High	New facilities proposed. If the shop could be relocated within an extended area, a larger space for the family research could be created. This could be positioned as a discovery centre, with a range of 'zones' to accommodate the range of enquiry from specialist, contemplative research to introductory events.
Exhibitions and activities	High	New space created for entry and improved visitor experience on arrival. Good space provided for exhibitions and events.
Museum relevance	High	Strong on opportunity to be innovative, reach new audiences or to develop new practice because of the spaces provided.
Benefits and outcomes	High	Cultural responsibility – many opportunities to address this; drive innovation – good opportunity; audience focus – as well as focus on growing current audience, increased visibility at front and new internal spaces provide opportunities to reach new audiences; community engagement –space provided, depends on programmes provided; digital development – difficult to assess in all cases but Museum has made a commitment to this; further the Museum's practice of being accessible – good, depends to an extent on the programmes provided.
Other considerations		
Costs	Preliminary estimate for the extension of \$2,440,290 (excluding GST). An allowance for digital and technology may be required, and exhibition design (unless in house) and equipment and interior design for visitor information space and family research centre.	
People	Some increase in staff and volunteers likely to be needed to service expanded Museum activity. Requires more detailed assessment.	
Operational practicalities	Remains within one building.	
Risk and mitigation	Addition to the front of the building may not be desirable to some stakeholders. The benefits of the front addition can be compellingly described and a sympathetic design achieved.	

Table 5: analysis of the Hammer Hardware (HH) building option		
Long term objectives	Alignment	Comment
Financially sustainable	High	Assumed that retail is moved to HH building, thus improving retail visibility and therefore optimising income if cost of goods sold is constrained. Opportunities for new income generation in new spaces, although ideas need development. Although related costs may be higher, the income generation opportunity is a distinguishing feature of this proposal.
Scottish Settlement	High	Option of consolidating the Museum building as a centre of excellence for Scottish settlement of Waipu and genealogy and positioning the new building as a gateway to the original museum. Shop could be relocated to the new building, creating the space for the learning and research (Discovery) centre. Must be dynamic as well as offering the space for more specialist, contemplative research.
Genealogical records	Yes	Option to consolidate genealogy in Museum building. If the shop could be relocated to the new building, a larger space for family research could be created.
Exhibitions and activities	Very high	New and purpose-built facilities provided in the new building. The location is a great position in relation to the Caledonian Park and opens up possibilities for public events. Creates the possibility of some improvements to the existing building to improve the layout including removing the current staff facilities thus improving the rear of the building and internal walls removed to open up the end of the visitor experience more fully.
Museum relevance	Very high	Opportunity to position the new building as a gateway to the original museum and offer programmes and events that reach new audiences. Treating the new building as a gateway to the current Museum building should generate new interest.
Benefits and outcomes	High	Cultural responsibility – opportunities to address this in fresh space, which changes the dynamic for Iwi engagement; drive innovation – good opportunity in a new space; audience focus – current audience likely to be pleased that Museum is less developed and opportunities to reach new audiences are significant; community engagement – the space is new space, which the community can have a hand in shaping, but also depends on programmes provided; digital development – difficult to assess in all cases but Museum has made a commitment to this; further the Museum’s practice of being accessible – good, depends to an extent on the programmes provided; a significant step for furthering the Museum’s practice beyond the walls and depends to an extent on the programmes provided.
Other considerations		
Costs		Assumed at this stage that it is likely to be a lower capital cost to convert the HH building than the other options. It is advised to include a solution to link the two buildings in the project costing. The existing building could need earthquake strengthening regardless of acquiring a second site. This should either be ruled out as not being required or be included in the costings as a precaution. Operational costs will be higher with two buildings, including staffing, maintenance, energy and cleaning. This may be offset by an increased in funding support, which has not been explored as yet.

	A new building would really need to offer the benefit of new income streams for it to be justified. Providing space in a new building for new income generating activities is feasible. These may also come with increased operating costs however, such as more staffing. This is to be evaluated.
People	Staff could be accommodated in the new building with improved facilities (assume to the same standard as current scheme). Volunteers and staff would work across both sites, which is a different proposition. More staff and volunteers required.
Operational practicalities	Operations across two buildings. Requires strong management, procedure, leadership and a unified culture to achieve a sense of one organisation across two buildings.
Risk and mitigation	Increased costs for staff and operations. People may not visit both buildings. This could reduce access to / take up of anything located in the other building (genealogy, retail, exhibitions, programmes etc).
Information gaps	Building design and cost assessment.