



STRATEGIC REVIEW
REINVENTING THE SOUTHLAND MUSEUM

The term 'reinventing the museum'
was first framed by Ken Gorbey in the Business Case prepared
for the Board of the Southland Museum and Art Gallery in 2015

*"a central issue in this, indeed any, new reinvention project will be the challenge of change,
its management and the difficulty of maintaining focus and courage
in the face of the many obstacles that will have to be overcome if progress is to be made".*

Cover image: Polyfest crowd, 2017

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Executive Summary

This report was commissioned by the Southland Museum & Art Gallery Trust Board [Board]. It outlines an assessment of the institution in terms of:

- Recommendations for its redevelopment as a ‘new’ Southland Museum [SM]
- IN RELATION TO
- Its operation as the Southland Museum and Art Gallery [SMAG] until its closure in April 2018 due to public safety concerns,
 - The proposed development of the new Arts + Creativity Invercargill [ACI] facility which will see the primary responsibility for arts programmes and activities removed from SM
 - The proposed development of a Regional Collections Storage [RCS] facility by the Southland Regional Heritage Committee [SRHC]

Previous schemes: Over the past decade there have been a number of proposals to extend the museum building on its current site. In 2017 the Board signalled its intention to commission a strategic review and feasibility study looking at redevelopment options, planned for 2027-28. The process of commissioning this was under discussion when the building was closed due to earthquake issues. The brief for this report was updated in 2018 to reflect this change of circumstance and timeframe.

It is the Board’s view is that the review should build on earlier reports on the proposed redevelopment. In particular Ken Gorbey’s excellent 2015 Concept Description and Business Case are endorsed in large part. Gorbey frames a set of ideas which remain at the heart of the redevelopment - *“It shall be a remarkable visitor experience... The reinvented Museum will be a place where Southlanders, strengthen their sense of identity as an inclusive, tolerant, healthy and cohesive community...[and] will be such a success that it will engender great pride within the community. It will also have an impact on the wealth for the wider community particularly as an attractor for domestic and international visitors”*

Community consultation has guided this report. A project of this type warrants consistent community research - prior to the strategic approach being developed, during the development of conceptual and programme design, and after the facility reopens. If the outcome is not relevant and meaningful its success will be limited. In addition to consultation with key current and potential stakeholders including the Council, Museum manager and staff, SRHC Board and advisory group, Mana Whenua, community funders, the culture and heritage, environment and sport sectors, Ngāi Tahu Inc, DOC, etc the report draws on The *Open the Museum* website started by locals after the closure and the *Our Tale NZ* community consultation programme team coordinated a region-wide consultation

The Board and Southland's Councils should not see this project as 'getting back to where we were' before the closure. The investment opportunity is to consider what a future-focused, reinvented museum will offer. Success will be based on building a proposition for a sustainable Museum that is inclusive, values-based and which will generate (multiple bottom-line) value.

Multiple-bottom line outcomes: A carefully developed, strategic approach to investment in museum will deliver multiple bottom-line advantage across community identity and pride, visitor and retail economy and liveability and attractiveness outcomes. That said, it is not uncommon for a lack of strategic thinking and a clear sense of purpose to result either in success in one area at the cost of others or a less-than-optimum success across all three. This cannot be allowed to occur. In 2015 Ken Gorbey offered salutary advice "*a central issue will be the challenge of change, its management and the difficulty of maintaining focus and courage in the face of the many obstacles that will have to be overcome. The project will challenge strongly held views, and seemingly compelling arguments against change. For the project to succeed change will need to be embraced by all involved...*"

Recommended model: Based on the assessment of the opportunities and benefits of investment, community consultation, future-museum trends and taking an integrated approach across the three facilities, the recommended approach to the new SM is a people-focused leisure and learning visitor experience. All other aspects of the reinvention of the museum should be focused on this idea. Four critical people-centred lenses are outlined that are seen as critical to success

- Taking a Te Ao Māori (Māori worldview approach), working in partnership with mana whenua,
- Ensuring a visitor research plan is developed
- Distinguishing between *digital thinking* and *digital technologies* will be critical to avoiding a (CAPEX and OPEX) high-cost and low-value approach.
- A strategic partnership approach based on the museum working with and activating regional networks, including the Museums of Southland and across other sectors

Commissionable product: An approach that sees the whole museum as a commissionable product is probably not the right approach in Invercargill. The recommended approach is to integrate a commissionable product as part of the overall visitor experience design - in a way that mitigates the risks outlined above and/or turns them into opportunities. The report outlines an opportunity to leverage shared investment in facility, content & platforms working with community and commercial partners.

Clarity of purpose: discussions about WHY the museum exists and the impacts it seeks to have, have been at the heart of the discussions from the outset. Board, staff and iwi representatives have been involved in the development of the purpose statement – *We activate touch points so that people engage, connect and stand up*. Examples of 'touch points' and 'standing up' are outlined in the report. The purpose is supported by a mission statement: *The Southland Museum works with communities, organisations and individuals, to develop and deliver learning and leisure experiences relevant to Southlanders as people, and to Southland's places and stories - which inspire, challenge and resonate with us as Southlanders, and captivate our visitors.*

Conceptual framework: The recommended conceptual approach *Deep South, Deep Time – Our Southern Frontier* builds on the 2015 theme developed by Ken Gorbey in consultation with

Southlanders. By adding the ideas of 'Deep South' and 'Deep Time' there is an opportunity to deliver advantages in terms of community pride, competitive point-of-difference and delivering a 'must see', 'must do' experience more visitors will want to come to Invercargill and Southland to see. This will be critical for sustainable success.

Programming: The programming approach should be:

- People-centred – relevant and meaningful to the people it serves
- Built on successes – the tuatara and sub Antarctic remain hugely popular
- Purpose-based – designed to deliver the impacts the museum is intentional about
- Co-developed - with partners and community participants where appropriate
- Balanced – across a range of experience types and difference audience's preferences

Tuatara: Subject to arrangements being agreed by Ngāti Koata and mana whenua, the tuatara should be seen as central to the new SM visitor experience proposition. However, the breeding programme should be reviewed.

Collections: Even though an 'imminent' redevelopment of the museum (which would inevitable require a collection relocation) has been on the table for over a decade the collection is in poor state of readiness. This appears to reflect a lack of prioritising on the part of the Board and management, resulting in significant deferred investment. It is what it is; there focus now needs to be on ensuring the Museum knows what it has, by number and volume, before the collections can be relocated. Relocation is required before capital works can commence. A budget allocation has been made to cover costs of a judicious, pragmatic and well-managed plan to move this forward.

Governance: The Museum's governance has been the subject of an ICC-commissioned review, acknowledging that defining the right model for governance is complex. In particular the complexity is based on there being three Councils, a range of different funding arrangements and the potential development and operation of three interrelated facilities. In NZ Councils take different approaches; operation as part of a Council is the most typical model for museums and art galleries. Irrespective of the outcome of the review, noting that for the next 5-year period the museum will be a major capital project, the establishment of suitably skilled Project Board or Control Group is recommended. The Governing entity needs to work with this group to prioritise the work/cost plan carefully (with an uncompromising focus on delivering a major project on time and on or under budget) and ensure partnership with mana whenua is appropriately reflected.

Stable Governance arrangements will need to be in place before funding applications are made.

Staffing: a flatter and more outward-facing team structure is recommended. During the transition 'project' period there needs to be a focus on ensuring the right team is 'on the bus' at all times. A budget allocation is allocated to cover specialist skills from within and outside of the staff and museum sector - including likely fixed term or contract roles such as project director, commercial, Te Ao Māori, technology, concept/experience development, collection relocation support etc. Development of a strategic team culture will be key - with a view to building the capacity and capability of the team who will go on to run the new museum once it opens.

Recommended development option: A range of costed approaches to the development were developed. These looked at four principal options 1) Do nothing 2) Upgrade the 'pyramid' (including

seismic) with or without a small glazed extension on the north face 3) Demolish the 'pyramid' and replace with a new two-level building providing the same area as the existing Pyramid building, and 4) Demolish the 'pyramid' building and relocate the Museum to an existing refurbished commercial building near the city centre. These are accompanied by a range of costed assessments of relocating the Museum's collections to allow the redevelopment to proceed.

Based on assessment of both cost and value, the recommended option is to retain and develop the pyramid building. The 2015 report assumed the retention of the pyramid, at the Board's request. The *Our Tale NZ*, while based on a small sample, showed a high level of support for retaining the pyramid. This increased when more was known about the history and story of the structure. As well the structure is seen as having unique advantages in terms of its relationship to Queens Park, its height (a new building is likely to be 2 stories only), its rich mana whenua references and its value in terms of brand and experience development.

Collection storage: An offsite solution (build or buy/refit) is recommended, as part of a regional facility. \$5.6m has been allowed for this. Locating a new-build collection store on the tennis court is not supported, because 1) It is a costly option - there is not sufficient space (within the 2009 resource consented area) to house a regional collection facility on a single level and 2) it is seen as an inappropriate use of public realm space

CAPEX: Based on the recommended option (which allows for collection storage) the CAPEX range in 2019 dollars is \$38.1m-50.5m. Allowing for CAPEX escalation at 7% year on year and construction in the 2023-24 year, the CAPEX costs will be between \$50m and \$66m. \$66m has been used as the CAPEX assumption. Notwithstanding this being a challenging financial target, funding is likely to be achievable - as per the assumptions provided in the report.

OPEX: calculations for the new museum indicate an increase in ratepayer OPEX funding, both in total amount (from \$1,745,000 to \$2,210,000) and as a percentage of the overall operation budget (from 40% to 50% – to bring it in line with comparable NZ regional museums). The operational revenue assumptions indicate a \$200k surplus. While there may be a preference to simply reduce the ratepayer grants by this amount, it is recommended that the surplus:

- Offsets the yet-to-be-accounted for operating costs of a regional collection store, and/or;
- Incentivises success, and/or;
- Allows an ability to carry-over funds to establish reserve funds required for mission-critical renewal and reinvestment that the current museum has been unable to undertake.

Project timeline: A recommended timeline is provided, including an outline of the transition period. While the Board had aspirations in 2018 for the reopening to occur in 2021, a 2023-24 target is more likely to be realistic.

1. Introduction

This report was commissioned by the Southland Museum & Art Gallery Trust Board [Board]. It outlines an assessment of the institution in terms of:

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- IN RELATION TO
- Its operation as the Southland Museum and Art Gallery [SMAG] until its closure in April 2018 due to public safety concerns,
 - The development of the new Arts + Creativity Invercargill [ACI] facility which will see the primary responsibility¹ for arts programmes and activities removed from SM
 - The proposed development of a Regional Collections Storage [RCS] facility by the Southland Regional Heritage Committee [SRHC]*

The acronyms SMAG and SM are used in the interests of clarity, to differentiate between these two periods of the institution's life. The latter (SM/Southland Museum) is not intended as a new name for the institution. Following the closure of SMAG in April 2018 due to public safety concerns, it has been clear that many people in the region value their museum deeply, which is common when a museum is closed for any reason.

This report does not include an assessment of issues relating to the closure, which are outside the scope. Rather it focuses on how a redeveloped museum might best build on the institution's history and ensure its legacy as a loved and highly valued institution into the future. The report outlines:

- The strategic considerations seen as important in terms of delivering a 21st Century museum for Invercargill and Southland that will remain relevant and sustainable into the future
- How the redevelopment will play a key role as an integrated part of a group of three facilities/activities, along with the ACI facility and the RCS, which may store Southland's regional museum collections, including those of SMAG.
- An assessment of the feasibility of the proposed redevelopment including an outline of the capital and operational costs associated with the redevelopment and its ongoing operation

*** NOTE:** The author is leading an assessment of the optimal approach to the proposed regional collection store [RCS] during 2019. This assessment is likely to impact on the recommended model for the SM outlined in this report in some way or another. There are a range of options but the most likely appear, at this stage, to be 1) a regionally owned and operated facility or 2). a SM owned and operated facility with regional service provision.

The focus of the assessment will be to deliver something workable and cost effective, which is either fully integrated with SM or directly aligned in key ways.

¹ There are likely to be instances when art is featured in the redeveloped Southland Museum

2. Background

2.1 History

In 1876, seven years after Andrew McKenzie first exhibited his small collection at his Invercargill *Scotch Pie House and Museum*, the collection was purchased by the Invercargill Athenaeum. It was later transferred to the Southland Technical College (1912) and the museum remained under the control of the Southland Education Board until it was constituted under the Southland Museum Board (Inc) in 1939. When the original building at the entrance to Queen's Park opened as Southland's New Zealand Centennial memorial in 1942 it excluded the planned art gallery, due to insufficient funds. There have been many additions, with an art gallery opening in 1960 and the addition of the Southland Astronomical Society Observatory in 1972. Extensions were made to the buildings in 1977. The period of redevelopment from the 1970s to the 1990s is credited to the leadership of Museum Director, Russell Beck, and Chairman of the Southland Museum & Art Gallery Trust Board, Dr Alfred Philip (Alf) Poole. The 1990 redevelopment enclosed the previous buildings in a 27 m tall pyramid, added dedicated art gallery spaces, a Tuatarium for the captive tuatara breeding programme, and spaces for a Cafe, Museum Shop and Visitor Information Centre.

In 2001 the Board awarded a management contract to Invercargill City Council, the principal funder, to operate the Museum on behalf of the Museum.



The original Museum building opened in 1942 on the current site

Over the past decade there have been a number of proposals to extend the museum building on its current site. This saw reports written by leading sector professionals T.L. Rodney Wilson and Ken Gorbey, and architectural designs prepared by Wixon McCoy Architects of Dunedin. In 2017 the Board signalled its intention to commission a strategic review and feasibility study looking at redevelopment options, planned for 2027-28. The process of commissioning this was under discussion when the building was closed due to earthquake issues. The closure has meant the Board is now focused on redevelopment within a shorter timeframe (2021-22). The brief for this report was updated to reflect

this change of circumstance and timeframe, together with the interrelationships with the ACI project and the in-development consideration of regional storage.

2.2 Ken Gorbey's Concept Description and Business Case - 2015

It is the Board's view is that the current review should build on earlier reports on the proposed redevelopment. In particular I have referred to Ken Gorbey's excellent 2015 Concept Description and Business Case which are endorsed in this report in large part. In his reports Gorbey frames a set of ideas which remain at the heart of the redevelopment:

"It shall be a **remarkable visitor experience that is exciting, [and] engaging.**" To achieve this vision the Museum and Gallery will become a place that is defined in terms of **strengthening the community and helping build an enriched future.** The reinvented Southland Museum and Art Gallery will be a place where **Southlanders, strengthen their sense of identity as an inclusive, tolerant, healthy and cohesive community.** The new cultural institution will be such a success that it will engender **great pride within the community.** It will also have an **impact on the wealth for the wider community** particularly as an attractor for domestic and international visitors"

In broad terms this approach aligns with community and stakeholder consultation undertaken as part of the current review process. The recommendations of the current report differ from Gorbey's only in degree. This is when substantive changes have occurred since 2015, including:

- Rapid changes in societal, technological and environmental trends
- The growing awareness of the importance of working in partnership with rūnaka mana whenua
- The growing strategic focus of Ngāi Tahu as a regional iwi, and importance of working closely with all runaka in the Southland area
- Regional strategic plans including the SoRDS report (2016) which include focused approaches to arts, culture & heritage in the context of wider thinking
- The consideration of relocating aspects of the 2015 SMAG operation as noted above (ACI, RCS)

2.3 Public consultation

A community project of this type warrants consistent community and customer research - prior to the strategic approach being developed, during the development of conceptual and programme design, and after the facility reopens. This is particularly critical for a project focused on success in terms of visitation and participation. If the outcome is not relevant and meaningful to the people it seeks to attract and deliver value to, its success will be limited. In this case the process to date has included:

- Reviewing Ken Gorbey's 2015 documents which were based on interviews with 42 community leaders and stakeholders which "demonstrated a desire for the re-invented museum and gallery to be a wonderful visitor attraction based on the nature and spirit of Southland and its peoples – a national and perhaps international benchmark for such statements of regional character".
- Consultation by the principal consultant in Southland and by phone/email – with key current and potential stakeholders including the Council, Museum manager and staff, SRHC Board and

advisory group, Mana Whenua, community funders, the culture and heritage, environment and sport sectors, Ngāi Tahu Inc, DOC, etc

- A review of comments on the *Open the Museum* website started by locals after the closure
- The *Our Tale NZ* community consultation programme team coordinated a region-wide consultation programme receiving input from 510 Southlanders who:
 - attended one of 14 workshops – total of 146 participants
 - completed a survey questionnaire - 71% via the survey

The high-level findings of the *Our Tale NZ* (appendix 1 vol2 p50) show strong support for the museum and its redevelopment. The *Our Tale NZ* research showed a preference for five key themes:

- **Explore Identity** - Helping people know more of who they are through connection to the past, and through this, growing personal pride and courage were mentioned by a lot of participants as the reasons why the museum was important to them.
- **Super Collaboration** - A vision of the museum being widely and deeply collaborative was a strong theme for many. It envisaged the museum being more outward looking and actively partnering and collaborating with a wide range of groups, organisations and individuals.
- **Gain knowledge and be inspired** - This theme was focused on people, adults and children, acquiring knowledge through the museum which would be 'somewhere to learn', a 'vault of knowledge'
- **Feel the experience** - There were a number of aspects to the experience people wanted but a central theme was the ability to have as direct an experience as possible, using whatever technology or manner of presentation would provide that
- **Community Connection** - People wanted the museum to be a focal point for the community to gather, see and take pride in itself - a destination, open and inviting

Other aspects of the research are reflected throughout this report.



Our Tale NZ and Open the Museum facebook pages 2018

3.1 A multiple bottom-line ROI

Investment in museum and art gallery facilities has the *potential* to result in benefits and returns on investment (ROI) across a number of social, cultural and economic bottom-lines. For this potential to be realised a clearly thought out strategic approach to each benefit/ROI, as part of an integrated whole, is required. In projects of this type it is not uncommon for a lack of strategic thinking - in combination with limited resources being spread too thin - to result either in success in one area at the cost of others or a less-than-optimum success across all three.



The three principal benefits available through strategic investment

In the Invercargill and Southland context the key, measurable benefits of investment in a new SM are:

- **Community identity and pride:** Museums typically hold taonga and artefacts, information, memories and stories specific to a place and its peoples. Through careful arrangement, interpretation and programmes museums can evoke key elements of the spirit, achievements, potential and characteristics of a place and its peoples - in a way that evokes a sense of pride and identity
- **Liveability and attractiveness:** Provision of a high quality, safe, accessible and contemporary community leisure and learning facility adds significantly to a city and region's sense of liveability. Places and activities for children, intergenerational family and community groups, contemporary food services and regular changing programming and events greatly enhance the perception of a place in the eyes of residents, visitors and potential migrants.
- **The visitor and retail economy:** Museums can contribute significantly to the likelihood of visitors coming to a city or region, and to the number of guest nights per annum in that city or region. In a city like Invercargill, which is currently an underperformer in terms of the regional and national visitor economy, there is an opportunity to take a more strategic and intentional approach to leveraging greater value in this respect.

By responding, in a balanced way, to each of these bottom-lines a reinvented SM will play an important part in building engagement, provide and value. And in so doing a strategic approach to SM will contribute to the retention of existing residents and attraction of returning Southlanders and new residents. Retaining and attracting professional and creative talent is likely to be an area of competitive advantage for the region. The current situation allows an assessment of the amenity value of the ACI, SM and regional storage. This reinforces that there is value in considering each in relationship to these bottom-lines, as a way of identifying what approach to each will add up to the greatest value for ratepayers.

	Liveability & attractiveness	Community identity & pride	Visitor & retail economy
Southland Museum	<ul style="list-style-type: none"> • A people-centred leisure and learning visitor experience. • Brand and changing programming generating contemporary Southland stories • Play a secondary role in rejuvenating the Invercargill city centre • Celebrate Te Ao Māori • Activating Intergenerational engagement 	<ul style="list-style-type: none"> • A must-see visitor experience telling stories about Southland and of and by local people • A greater connection with other community, government, iwi agencies to leverage wider stories and opportunities • Play a key role (with RCS) in regional museum support and activation 	<ul style="list-style-type: none"> • A must-see visitor experience – increasing visitation, accommodation, food & beverages and retail spending. • Te Ao Māori central to the experience of place and peoples Actively connecting visitor to other Southland experiences • Destination food services, retail showcasing locals
ACI	<ul style="list-style-type: none"> • A people-centred art and activity centre. Brand and changing programming generating a contemporary Invercargill brand story near and far • Play a primary role in rejuvenating the city centre 	<ul style="list-style-type: none"> • Local artists and creatives, art from the local collection, participating creatively yourself • Activating Intergenerational engagement • A hang-out place for youth 	<ul style="list-style-type: none"> • Rejuvenating the city centre, active programming day and evening, stimulating after-hours activity • Options for a commissionable product playing each morning • Creative workshops with local artists
RCS	<ul style="list-style-type: none"> • Deeper opportunities to actively connect with the treasures and stories of Southland in innovative ways 	<ul style="list-style-type: none"> • Collections and knowledge storage, care, access, pastoral support • Play a key role (with RCS) in regional museum support 	<ul style="list-style-type: none"> • Specialist researchers • Genealogists • People with relationship to Southland • Historians

A strategic approach has the potential to provide wider benefits than any one project could in isolation

3.2 An integrated set of initiatives

As noted, the SM redevelopment project is occurring in relation to two other projects, with their own defined drivers and 'owners':

ACI - This project proposes the principal art programming and activities relocated from SMAG to an Invercargill City Centre site.

- **Project driver:** The SoRDS report identified the rejuvenation of the Invercargill city centre as a primary objective for investment. This will positively impact on perceptions of the city and region - in terms of attractiveness and liveability as a key element in the region's mid to long-term economic and social wellbeing.
- **Project owner:** Invercargill City Council
- **Status:** ICC have approved the project and allocated partial funding in the LTP. A director is currently being recruited.

Regional Collection Storage - This project is intended to oversee an integrated regional approach to cataloguing, digitising, storing and providing access to Southland's collections and related stories. It is intended that all SMAG collections will be relocated to an RCS, rather than to dedicated SMAG onsite or offsite collection facility. The RCS is also seen as providing museum pastoral care and support regionally, related to these functions.

- **Project driver:** SRHC analysis, failing volunteer museums across Southland placing collections and knowledge, stories at risk, CAPEX being invested in multiple new museums without adequate OPEX funding or collections storage allowances. An unviable mid-to-long-term OPEX and CAPEX scenario – extensive research
- **Project owner:** Southland Regional Heritage Committee (ICC, SDC, GDC)
- **Status:** ICC have tentatively allocated partial funding towards the project in the LTP. A feasibility report will be completed by mid-2019.

Progressing three projects of this type within a single timeframe will have some challenges in terms of procurement and funding. That said, seen collectively, the three projects represent a 'step-change' in terms of the region's strategic consideration of and investment in cultural and heritage infrastructure. Critical to success will be ensuring there is a strong focus on:

- All three elements being seen as part of an integrated approach
- A cross-project focus on increasing value while limiting undue operational cost
- A consideration of other publicly-funded organisations in the culture and heritage sector

These considerations require a careful assessment of the best approaches to all aspects of the project, including:

- | | |
|--|-----------------------|
| • Ownership & Governance | • Facility design |
| • Leadership | • Procurement |
| • Organisational design | • Fundraising |
| • Relationships with funders and partners | • Operational costs |
| • Project oversight and project management | • Operational revenue |

Note: the report is structured primarily to focus on the redevelopment of the Southland Museum.

Comments relating to its alignment with other proposed projects can be found in Vol 2 p20

Libraries and archives

There are also critical interrelationships between these agencies and the Invercargill Libraries and Archives, and library networks across Southland. It has been and will be continue to be libraries that are at the forefront of burgeoning digital platforms and user preferences. It will be essential, therefore, that the operational model is based on ensuring a high-level interrelationship between the publicly funded facilities and services across the GLAM (Galleries, Library, Archives and Museum) sector.

	Rejuvenating Invercargill centre	Museums of Southland regional support	Community digital interface	Collections & Archives Management
Southland Museum	✓	✓	✓	↔
RCS	↔	✓	✓	✓
ACI	✓	↔	✓	↔
Library & Archives	✓	↔	✓	✓

Working collectively the three projects will deliver increased value across a number of key metrics

✓ = strong player ↔ = potential depending on the model adopted

4. Building for the future - the reinvention of the 21st C museum

The significant redevelopment of a regional museum occurs infrequently. It is important therefore to ensure that the opportunity is taken to ‘reinvent’ the museum, to ensure all aspects of the redevelopment are purposefully future-fit. While systems and operational aspects of the museum will evolve periodically once the ‘new’ museum opens, for a number of decades they are likely to occur within the physical parameters of the built facility. An assessment of the drivers of the project and the opportunities and potential benefits through the investment, suggest a bold, front-footed and future-focused approach is warranted – and *required* if the investment is to deliver a sustainable outcome.

The Board and Southland’s Councils should not see this project as ‘getting back to where we were’ before the closure. As in any community there will be those who will argue for retaining a conservative ‘status quo’ model; it is a statement of what that group values. However, the leadership opportunity is to listen openly to these groups and open up a conversation with the wider community around what a future-focused, reinvented museum can offer. Success will be based on building a proposition for a sustainable Southland Museum that is inclusive, values-based and which will generate (multiple bottom-line) value. In 2015 Ken Gorbey offered salutary advice:

“a central issue in this, indeed any, new reinvention project will be **the challenge of change**, its management and the difficulty of maintaining focus and courage in the face of the many obstacles that will have to be overcome if progress is to be made. **The reinvention project will challenge strongly held views established by tradition, and seemingly compelling arguments against change will emerge. However, [success] will demand the abandonment of fondly held positions** and adjustments in virtually all areas of the Museum... policy and activity. For the project to succeed change will need to be embraced by all involved...”

In 2019 our collective sense of the future is changing fast. We are facing global climate challenges that are likely to dramatically impact on Southland’s natural environment and coming generations, as they will everywhere. The impacts of digital technologies on almost every aspect of life will increase exponentially over coming decades. The rate and level of innovation and disruption is so rapid it is not possible to anticipate trends beyond a year or two. In Southland, localised changes are occurring in terms of the demographic and psychographic make-up² of its communities³. Here, and across New Zealand, we are seeing some positive changes in the importance of Māori identity and world views - as they relate to ways of seeing the importance of place, whakapapa and multiple bottom-line and intergenerational well-being. For Southland as a region and New Zealand as a country we are seeing changes in terms of how economic wealth is generated (across agriculture, horticulture, tourism, smart business start-ups etc). The nature of employment is changing and, with it, educational pathways for students.

² These changes are in terms of both demographics (age, ethnicity, sexuality, socio-economic status, gender etc.) and psychographics (shared interests, drivers, values, recreational preferences etc.)

³ Sport Southland have created a new role to re-engage children and youth in the importance of ‘play’ – partly in response to a growing risk averseness among parents

4.1 The emerging roles of museums

Within this change environment the key shift for the Museum will be from being a building housing collections and exhibitions to an organisation focused on having wider impact with and for its communities. Central to this shift is a need to think carefully about *why* the museum exists - who for, who with, what are impacts it is seeking to have, to what end...? This clarity of purpose will be the strategic 'true north' to which all aspects of its development, design and operation are aligned.

As well, success will rely on the museum becoming an outwardly-focused, networked organisation that actively facilitates and collaborates with other agencies, groups and individuals. In terms of *how* the Museum operates, collaborative and partnership-based approaches must become a key focus a joined-up 'ecosystem' culture. As the recently published *Systems-thinking and Museums*⁴ notes:

"... interconnectedness and interdependence – **collaborative organisational structure, shared authority and strong community engagement**... failure to be inclusive, collaborative, and engaging in meaningful community partnerships **may leave museums floundering**. Systems thinking can be summed up in this simple phrase; the whole is bigger than the sum of the parts. Our premise is that **museums will be better off when they operate as open, dynamic, and learning systems as a whole** as opposed to closed stagnant and status quo systems that are compartmentalised and hierarchical"

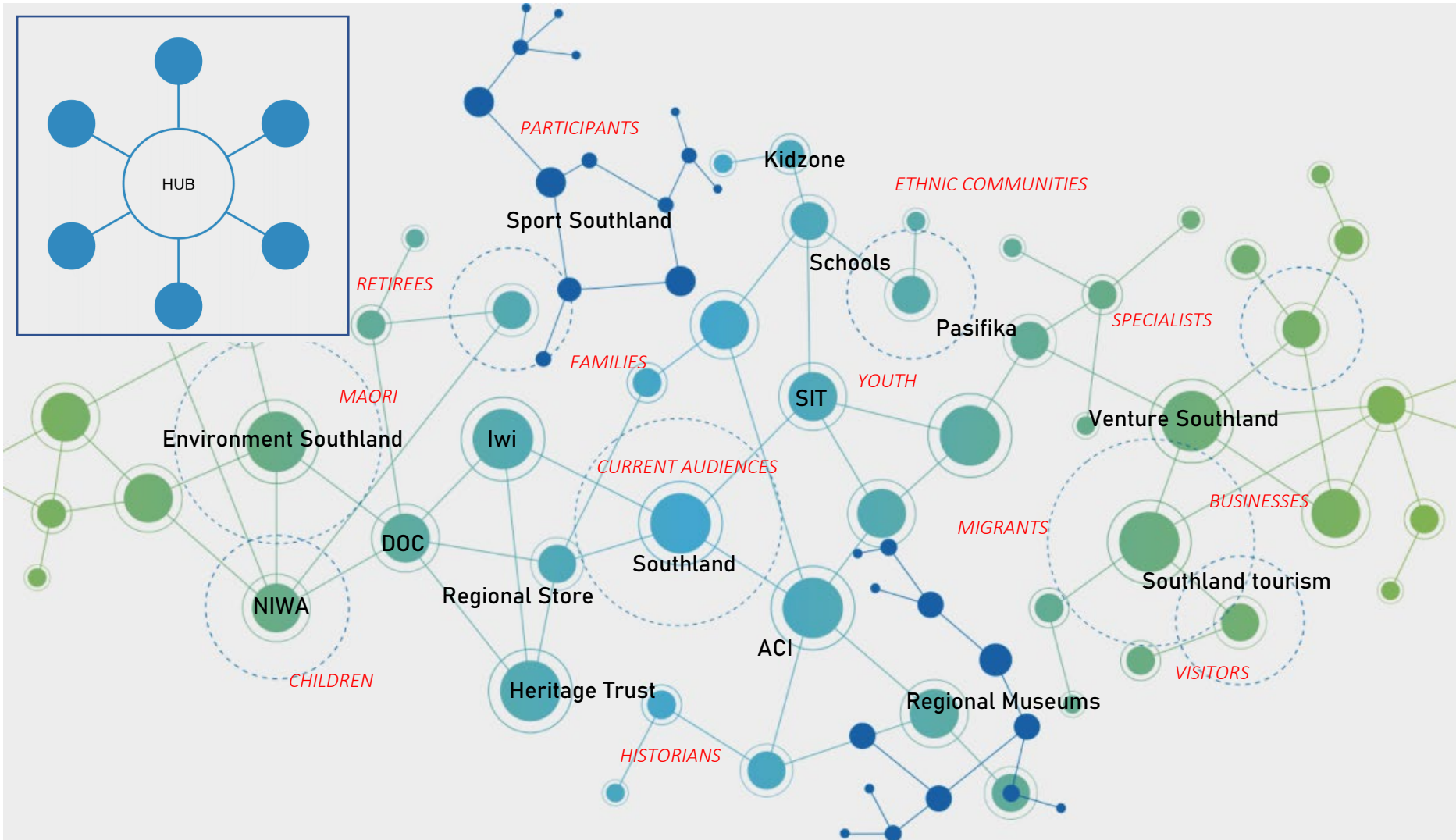
The Board are fortunate that the 2015 reports were prepared by Ken Gorbey - a global leader in new museum thinking over many decades. But while his thinking provides a strong and sound base for the current review, it is also worth noting how his own view of the future of museums has evolved since 2015. In relation to the current review he has recently commented that:

"My current thinking/work is taking me away from 'museum as threshold' toward the 'dispersed/ubiquitous'. I suspect ... we should be putting our efforts for the future into ... creating new ways of **achieving mission by utilising existing and widely accepted thresholds**"⁵.

Here Gorbey is taking about museums needing to move beyond the idea of simply being a 'building' holding and exhibiting 'collections'. Citing leading museum leader internationally he sees potential in increasingly working in integrated ways, with other agencies, across existing, dispersed platforms and networks. This aligns with the recommendations at the heart of this report. It is important to consider how people might engage in the museum without entering the building, and to consider how the experience within the building might connect to, and send people out to explore, other dispersed learning and experiences – such as regional museums, cultural landscapes, digital platforms, online and onsite visitor experiences and information and knowledge resources.

⁴ Edited by Yung & Love; published by Rowman & Littlefield, Lanham, Maryland 2017

⁵ Ken Gorbey; personal correspondence with the author, 12 October 2018



An indicative Southland Museum 'ecosystem' of organisations, communities and groups (Inset: a hub model – eg: 'SMAG + regional museums')

CURRENT	FUTURE
GLAM Sector⁶	
Museum as keeper	Museum as connector
Collections are paramount	Purpose is paramount
Visitors and people distract us from our real work	Visitors and people are our real work
Value is inherent	Value is generated
Silo or hub	A nodal network
We work for our community	We work with our community
Onsite	Onsite / offsite / online
Analog thinking	Digital thinking
Aarhus – an international exemplar of ‘future library’ thinking⁷	
Information	Meaning & significance
Well informed	Experimental
Serious	Playful
‘Passive’ visitor	Visitor is an active resource
Museums tells us	Museum explores with us
Neutral space	Sensuous/emotive space
Space for media	Space as media
We seek information	We create knowledge
Ken Gorbey – SMAG Business Case 2015	
Insular	Civic engagement
Reactive	Proactive
Single visionary leader	Shared leadership
Voice of authority	Multiple viewpoints
Reserved	Compassionate
Exclusive	Inclusive
Good intentions	Public accountability
Assumed value	Earned value
Focused on past	Relevant and forward looking
Social activity	Social responsibility
Information provider	Knowledge facilitator
Internal perspective	Community participant
Individual roles	Collective accountability
Stability	Sustainability

Key shifts in Gallery, Library, Archives and Museum (GLAM) sector thinking and practice relevant to this review.

While these are being seen in innovative institutions in New Zealand and internationally, the sector is by definition ‘conservative’ and the majority of investment is still focused in the left-hand column

⁶ Developed by the author, based on work by Kamaya Crawford, Department of Internal Affairs, 2014

⁷ <https://www.slideshare.net/rolfhapel/cilip-and-library-association-of-ireland-belfastapril-2015>

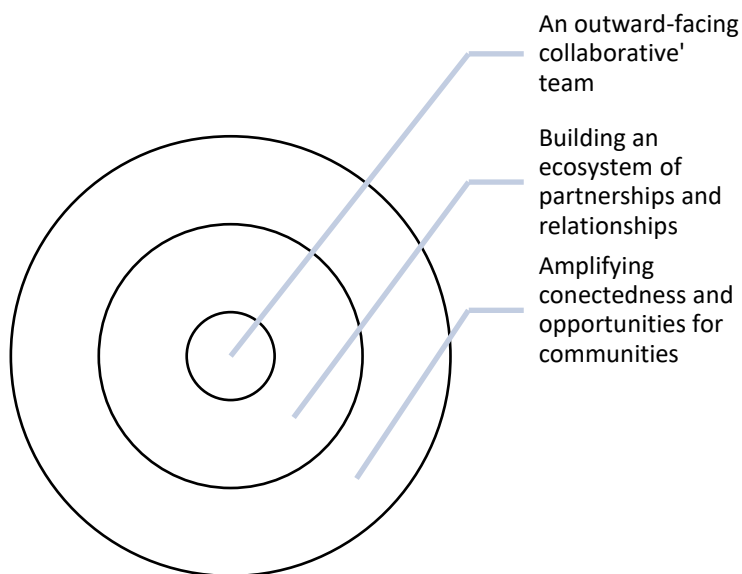
4.2 Activating an ecosystem

Museums have traditionally thought of themselves as ‘hubs. By definition, in the case of an organisation like SMAG, this means the idea of operating at the centre of predetermined and ‘hard-wired’ satellites – such smaller regional museums across Southland. In the world we are living in, a ‘hub’ model is redundant and not useful as a way of expressing relationships. It belongs in an age when a telephone exchange was the only way in which each telephone could connect with another. In a digital world, each phone connects independently to others, through users’ preferences, with a network of multiple of choices and connections. The new SM will build on the good work it has been doing to think of itself in this way - playing a connecting, networking and facilitating role amidst an ‘ecosystem’ of groups, individuals and organisations.

A standard 2017 museum	‘future museum’ roles	A ‘future museum’
siloed	<i>facilitator</i> <i>connector</i> <i>activator</i> <i>conductor</i> <i>co-creator</i>	networked
analog thinking		digital thinking
resource		platform
stakeholders		partners
value is inherent		value is generated
for the community		with the community
‘either/or’		‘and’

The key roles for a new SM

To open up and leverage the potential of SM to operate in this way will require attention being paid to the internal organisational culture and the way on which an outward-facing organisation activates and operates within a wider Southland ‘ecosystem’.



The SM leadership culture needs to be collaborative, outward-focused and networked

5. Defining the value proposition

In terms of the redevelopment it is critical to note that replacing 'like with like' is not the only or best option. An outline of the opportunities and benefits available through a strategic approach to investment are outlined in this section.

5.1 Project drivers

The redevelopment of SMAG has been under active consideration for over a decade. As noted, before earthquake rating issues resulted in the museum being closed to the public in 2018, the redevelopment was scheduled in the ICC's long-term plan a decade out. The closure decision has brought that forward, with a focus on opening a 'new' Southland Museum within 3-4 years. Community leaders have expressed a strong desire to reopen the Museum as soon as practicable, responding in part of the sense of loss clearly felt by many in the community as the result of the closure. The Museum is the regional museum in Southland. As such its closure reduces access to critical learning and recreational resources and reduces the collegial professional support available across other regional museums, many of which are poorly funded or volunteer-run.

5.2 Project assumptions

Noting the long-running and fitful history⁸ of the SMAG redevelopment to date, the Board has asked that this review build on the work done by Ken Gorbey between 2012-15. This assumed:

- A focus on redeveloping the Southland Museum as people-centric/visitor experience model focused on community engagement, and visitors to Southland
- A primary focus on telling the Southland/Deep South story
- The pyramid will be redeveloped

Noting the ACI project (subject of a feasibility report in 2017, with recruitment of a director currently underway) and the SRHC's consideration of a regional collection store (well-progressed, with a feasibility report due to be commissioned soon) the project assessment excludes an allowance for:

- Space for the primary display of art or programming of art-related activities
- Storage space and operating costs related to collections care, cataloguing etc within the redeveloped building and operation

5.3 Project opportunities

The redevelopment project provides a significant opportunity to:

- Establish a successful and sustainable 'must-see', 'must-do' 21st C leisure and learning visitor experience that will grow visitation and participation (including increases in repeat visitation and duration of visits)

⁸ The assumption that SMAG collections could be stored in a new facility further encroaching on Queens Park has been an issue of contention in previous schemes. It is not recommended to go down this path again.

- Positively impact on local, regional and national perceptions of Invercargill⁹ and Southland's attractiveness and liveability as a lively 21st Century community with a deep sense of place, identity and stories – contributing to retention and attraction of more people (as residents and visitors), investment and discretionary spend
- Add a commissionable product to the Invercargill/Southland visitor offer
- Develop a revised and improved approach to supporting the wider regional museum sector
- Increase the museum's ability to fund services and activities through a smarter approach to partnerships, revenue, savings, other forms of funding, endowments and general innovation
- Increase the sense of ownership by Southlanders, and the attractiveness, meaningfulness, relevance, value of the Museum and its programmes for them and visitors to Southland
- Expand the range, level and incidence of intergenerational activity within families, and cohesion between different individuals, groups and sectors within Southland
- Connects with and orchestrate increased value through partnerships with other existing and developing agencies to generate greater collective value – including attracting new visitors online and on-referring them to other Southland experiences (and vice versa)
- Play an enhanced role in attracting visitors to Invercargill as part of a Southland visit
- Undertake a capital project which will be of great interest to funders, who will play a key role in ensuring the fundraising targets for the project are met, and attract significant Government investment in long-term local infrastructure
- Be a learning and leisure destination and platform (onsite, offsite and online)
- A great place for children and a platform for youth

Project benefits

Through a strategic, future-focused approach to realising opportunities through investment in the project, as outlined in this report, stakeholders will receive outcomes in the following areas:

- Increased community identity and pride
- Enhanced city & regional profile and attractiveness
- Enhanced Māori identity and wellbeing – underpinned by a significant shift in the presence, voice and world views of Māori as part of Southland's history, present and future
- Improved visitor & retail economy (Invercargill and Southland)
- Increased opportunities for children, youth, families, older residents and intergenerational connection
- Greater retention of existing and attraction of returning or new Southlanders
- Increased social cohesion and inclusion
- Community leadership and participation in leadership
- Educational engagement and outcomes

⁹The Southland Perception Study notes that in terms of perceptions of 'urban lifestyle/ nightlife' – only 12 per cent rated Invercargill's nightlife is exciting (lower than the perception that Southland's nightlife is exciting)

The importance of being clear about purpose

To be people-centred, and to successfully leverage value for and on behalf of the communities it serves, a new Southland Museum will have to have a clear sense of purpose.

“Mission statements are about the work of the museum... **[purpose] statements are about the recipients of the museum’s work**”¹⁰

In the introduction to the landmark book *Making Museums Matter*¹¹ by influential American museum thinker, the late Stephen E. Weil, Marc Pachter outlined Weil’s views:

“the notion that the museum world is a sacred, special place that is ipso facto wonderful and deserving of the world’s support and adoration is not only outdated but pernicious. What people who work within it need to do, those who are still stuck in the exhausted paradigm, is to realise that **the modern world is asking tough questions of museums and their management, and that they are appropriate questions.** To greet those questions with outrage or lamentation, as an assault on the ‘temple’, or at least as presumptuous ignorance, is not only to threaten the survival of museums, but worse, **to miss an opportunity to make them fulfil a responsibility to society too long deferred**”

This idea of ‘making museums matter’ remains a pressing issue sixteen years after Weil’s book was published. At the heart of his thinking is the need to be clear about the impact an organisation seeks to have, and aligning every aspect of the its design, structure, culture and operations to that.

“Having a unified purpose or impact statement is a prerequisite for a museum pursuing international practice. **Museums that don’t have an impact statement with supporting outcomes ... run the risk of becoming lost and rudderless...** Will any difference do, or is it only the intended differences with which we are concerned? **The good museum is the one operated with a clearly formulated purpose,** defined in terms of these particular and positive outcomes it hopes and expects to achieve”
STEPHEN E WEIL

¹⁰ Randi Korn in *Systems Thinking and Museums* edited by Yung & Love; published by Rowman & Littlefield, Lanham, Maryland 2017

¹¹ Stephen E. Weil, The Smithsonian Institution, Washington 2002

6. The recommended approach – a people-centred, learning and leisure experience

The current SMAG configuration and operating model has resulted in a less than optimum visitor experience and a less than ideal outcome in terms of collection care, research, cataloguing, digitisation etc. Staff acknowledge that under the 2017 operation model they were constantly splitting time and resources from changing exhibitions to working on the collections. This constant ‘busyness’ appears to have been at the cost of building momentum in areas critical to preparing the museum for the redevelopment process (which has been on the cards for over a decade). This in turn suggests a lack of effective mid-to-long-term planning, undermining progress on gallery renewals and collection projects.

The staff are to be congratulated on sustaining high visitation levels – made up of a mixture of visitors to Invercargill (though the museum is unlikely to be the *reason* for visiting the city or region for many) and the museum being loved by many locals. High visitation is obviously a good thing, but it is also important to exercise caution. Dame Cheryl Sotheran, the inaugural CEO of Te Papa typified many museums (including Auckland Museum) as being ‘default’ - rather than genuine - attractions. By this she meant that when there is little else to do in a city, museums often do well. The risk, of course, is that if other experiences become available that are more relevant and interesting, sustained museum visitation is at risk. In the Invercargill context this might, for example, include new warm, free, undercover public amenity such as the ‘Block’. As well, assessments of visitation to Te Papa¹² and Christchurch Art Gallery indicate that large visitation by locals can frequently come down to multiple visits per annum by a relatively small base (10,000 people coming 10 times a year for example, compared to 50,000 people coming at least twice a year). Certainly, many locals interviewed in the process of developing this report consistently commented that the museum ‘never changes’, ‘it’s only a good place to go when its wet’, ‘we’d rather take the kids to Dunedin for the holidays to see the museums there’ - or ‘we don’t visit at all’.

While more funding and a bigger staff is often seen as the way of addressing this, there is greater value in assessing how these two functions – collections-centred museology and people-centred experience design – might develop if each was centred on best practice, working collaboratively. Based on the assessment of the opportunities and benefits of investment, community consultation, future-museum trends and taking an integrated approach across the three facilities, the recommended approach to the new SM is a people-focused leisure and learning visitor experience. All other aspects of the reinvention of the museum should be focused on this idea.

6.1 Key principles

The successful redevelopment of the new SM (in an integrated SM + ACI + RCS context) will be based on the following principles:

- **People-centred** – users will be central to the thinking and operational model (of all 3 ventures)

¹² Clint Elsom, former Te Papa visitor research team, and Ken Gorbey/Tim Walker respectively

- **Joined-up** – the outcome will be seen as being strategically interconnected with the SRHC, ACI and other relevant organisations, agencies and communities – to ensure synergies and collaboration result in the whole being more-than-the-sum-of-the-parts
- **Relevant and meaningful** – Learning and leisure experiences will be relevant and meaningful to their users, many of who will have contributed to their development and/or will participate in their activation
- **Centres of best practice** – the sum will be stronger because of the strategic focus and expertise of each of the parts
- **Purpose-fit** – the outcome will have a clear sense of purpose and impact on people
- **Values based AND value-bearing** – success will be based on a clear sense of values and be focused on generating measurable social, cultural, economic and environmental outcomes
- **Te Ao Māori** – Mana Whenua will be central to the thinking, at all levels, from the outset
- **Ecosystem** – the ethos of partnership will be expanded to include a wider set of prioritised agencies, organisational and people – including DOC, Environment Southland, schools, SIT,
- **Authentic voices** – The museum should be a platform for a range of voices, world views and perspectives - including those rarely or never heard
- **Courage** – Leadership will carry through the project with intelligent single-mindedness and courage
- **Rigour** – a high-level of professional rigour will be applied to the project at all times, ensuring maximised value in return for managed cost (CAPEX and OPEX)
- **Sustainability** – SM will be a viable and sustainable entity, culturally, socially and operationally – the development will be planned so that it avoids becoming an unacceptable financial and environmental burden on the Southland district
- **Local expertise** – even though there are potential quality, cost and time penalties involved, the redevelopment project and subsequent operation will seek to make use of, and grow, local expertise, capacity and industries

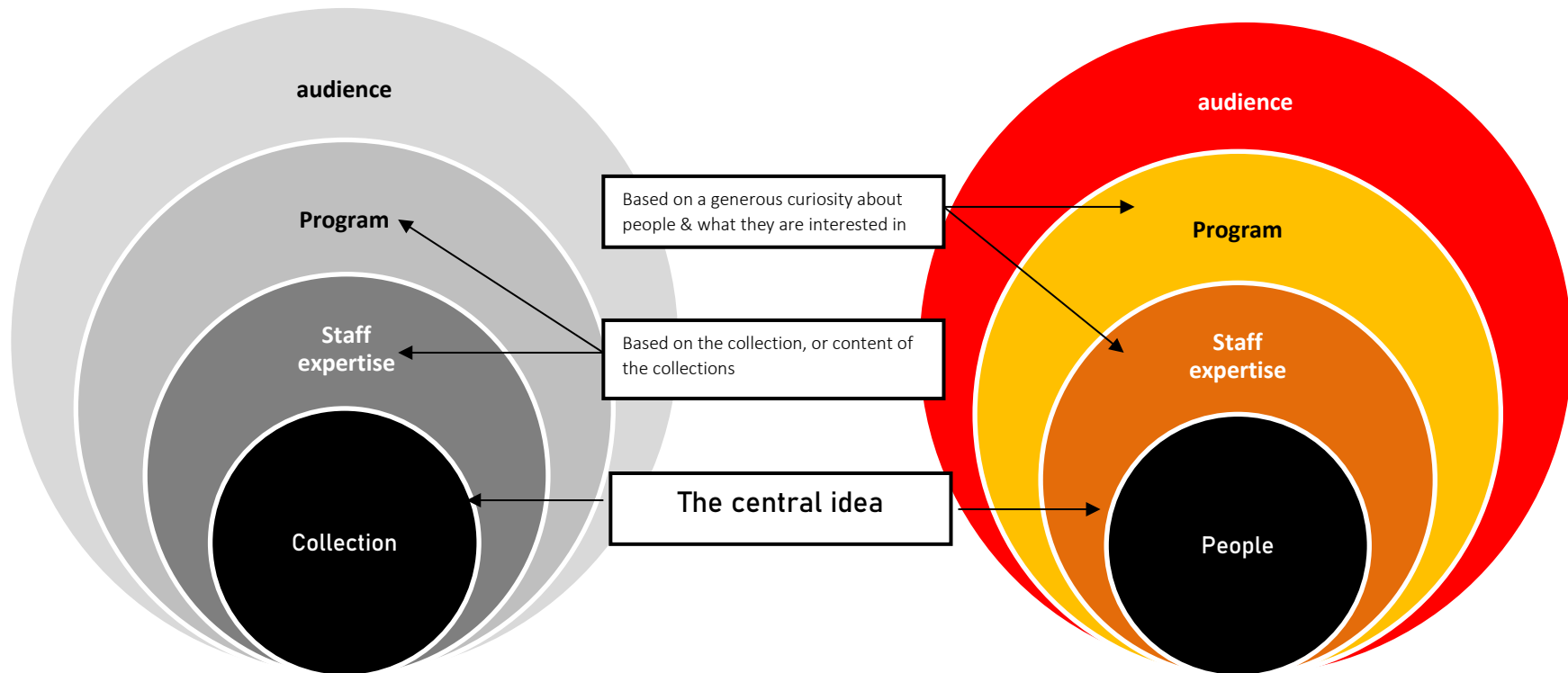
6.2 Four critical people-centred 'future' lenses

In considering the opportunity to become a future-focused and sustainable people-centred learning and leisure visitor experience – with a value-bearing point-of-difference, four strategic lenses will be critical.

6.2.1 Te Ao Māori; the 'ReMāorification' of the museum

'Decolonisation' is a current discussion in museums across the world. This is focused on how museums can acknowledge their historical bias (in terms of how items were collected, whose voices are heard and whose world views are expressed) and how they might facilitate the voices and world views of indigenous peoples. Museums in many iterations are increasingly seen as part of a the 'colonising' project of settler societies. Head of Mataranga Māori at Te Papa, Puawai Cairns - who suggests the¹³

¹³ (the full blog is included as Appendix X): <https://blog.tepapa.govt.nz/2018/10/19/museums-are-dangerous-places-challenging-history/>



Collections-centred / people-centred

It is useful to differentiate between a model built around the care and display of collections and one which is focused on people, their engagement, participation and involvement. Each approach results in a different way of thinking about staffing, public perceptions, accessibility, events and activities etc.

Note: This is not an 'either/or' approach; rather it is about 'and'. A 'people-centred' model is *not* antagonistic to collections- the Museum's collections have a key role to play in both models.

term 'ReMāorification' in a local context, rather than 'decolonising' - outlines some key ideas in a recent blog:

“Moana Jackson, in his keynote address at the 2016 Museums Australasia conference in 2016 asserted that museums are dangerous because “they are the namers of names”, meaning that **museums have the power to define and confine knowledge, and for indigenous people this can amount to historical erasure** of their own narratives or even complete silencing. Museums are trying to find ways of allowing multiple narratives and perspectives to be shared from its platform, relearning new ways of storytelling and new ways of opening up or sharing its authority. **The need to decolonise, to decentre the institutional – and therefore, the powerful – voice, and allow others to tell their own stories on their own terms** has become a wero (challenge) to which many museums are trying to respond”.

Similarly, in a recent story in the Washington Post¹⁴ the author notes:

“Jaclyn Roessel, who is Navajo, was brought on to the *Museum of Man* last year as the director of decolonization, where she worked with museum officials and leaders from the Kumeyaay Nation to change programming. **“I wanted to show we don’t need to be dependent on non-Native voices to authorize the telling of our story.”** Michael Connolly Miskwish, a historian and tribal member of the Kumeyaay Nation [said] “Of course, museums love to display things from Indian people and they have **a tendency to display things from Indian people as something that once existed and is long dead** ... There are still people in the community who are distrustful of the ultimate motive.”

The same issues and views have been central to discussions with representatives from Rūnaka in Southland, in relationship to the Southland Museum and its reinvention. At hui organised at from the outset of the review process, Rūnaka leaders been keen to ‘reinvent’ what a museum in Southland might be. One kaumatua questioned why the museum displays *archaeological* evidence of Māori history when, to his way of thinking “those things aren’t us; the landscapes and the stories – that’s us”. Another kaumatua asked if it might be possible 1) to talk about the Tiriti ō Waitangi in the new museum and 2) to do that in a way that offset the story iwi still hear, that Ngāi Tahu got a ‘pay out from taxpayers’, with their own perspective – that in accepting the settlement with the Crown the iwi was effectively gifting the overwhelming majority of the value that had been lost, to New Zealanders.

Across New Zealand different iwi have their own approaches to working with museums. Some elect to continue working with the museum, keeping collections there. Ngāi Tahu is an example of this, running specific programmes with South Island museums to achieve set goals. Often this is about knowledge preservation around taonga - not just conservation alone. It’s about meeting tribal needs as the priority. Ngāi Tahu is seen as an excellent NZ benchmarking organisation right across the board – in relation to urban design, museums, digital, resource management etc. Indigenous-led museum models offer valuable insights into how museums are changing when first peoples are at the leadership table. By

¹⁴ https://www.washingtonpost.com/nation/2018/10/12/decolonization-american-museum/?utm_term=.60cee3adaf06

working in partnership with iwi, museums offer opportunities to support multiple bottom-line, intergenerational tribal development aims - based around tribal concepts – in ways that benefit the institution and the wider community.



Moving the perspective from ‘rocks in the museum’ to ‘stories in the landscape’ is seen as having value

Aligning with latest thinking in collections access – there is a need to get collections out into communities and give the community more of a say. Puawai Cairns, Head of Maturanga Māori at Te Papa suggests the Zuni Ashiwi museum in New Mexico¹⁵ is a good exemplar for Southland Museum. “It’s run by Jim Enote. Jim is a gentle native thinking giant. Especially relevant to Ngāi Tahu because of Jim’s focus on Zuni agriculture and the parallel with mahinga kai practice”

“In the spirit of *Amidoamine*, the Zuni word for rainbow and the name of a multiple museum collection database situated at the Ashiwi Awan Museum and Heritage Center, we will advocate for **pure and virtuous collaboration**. This is a higher order than many may be concerned with and implies that collaboration involves **reaching out and enlightening on equal terms: to decentralize power and leadership** and share problem solving... We are informed by many years of experience, we are serious people, and we are thinking differently from those that served before us. Surely, imaginative and unfamiliar concepts will be met with resistance, but when the tide goes out, I imagine **we will trust heretical notions as positive beacons that will enlighten the field of museology** and manifest **new accountability of all knowledges through pure collaboration**¹⁶”

¹⁵ <http://ashiwi-museum.org/about/staff/>

¹⁶ Jim Enote, 2015 International Conference of Indigenous Archives, Libraries & Museums. Washington, DC <http://ashiwi-museum.org/collaborations/museum-collaboration-manifesto/>

6.2.2 Audiences

Clearly, a 'people-centred learning and leisure visitor experience' model will rely on a high level of visitors – to onsite, online, offsite programmes. And it will rely on these people returning more often and staying longer. Visitor preferences, in terms of travel and awareness and perceptions of a city or region, change over time. A visitor research plan should be developed as part of the next stages of the project's development. This should be designed to understand data as at 2017 and, in relation to that, explore and test assumptions and trends around:

- existing and potential visitors
- target audiences (local, regional, South Island, New Zealand, International)
- where people come from and how visitors rated the experience
- user behaviours and preferences
- viable revenue opportunities including ticketed programmes, retail, functions etc

As noted by Gorbey in 2015, in the first instance audiences are as follows:

- **The primary audience** - the community (Invercargill and Southland). The long-term aspiration should be that "all peoples of the region will become supporters and affirmers" of the museum. Within this some segments of the population will warrant a concentrated focus through programming and marketing:
 - The family or family-like cross-generational grouping of child(ren) and adult(s). This is a demanding audience in that it requires the facility to be configured for the needs, learning styles and interest levels of both younger and older people
 - Specialist committed local audiences that return regularly
 - Education groups and organised tour parties
 - Queens Park visitors
- **The secondary target audiences** - Gorbey noted that these will include those who trace some ancestry to Southland, domestic New Zealand visitors and family & friends of locals

Maximising engagement (first-time and repeat visitation) of the local audiences will provide the highest value for the museum in terms of visitation and use. Equally, a high level of community use and presence will in turn increase the attractiveness of the experience to those visiting from outside the region.

Tourism

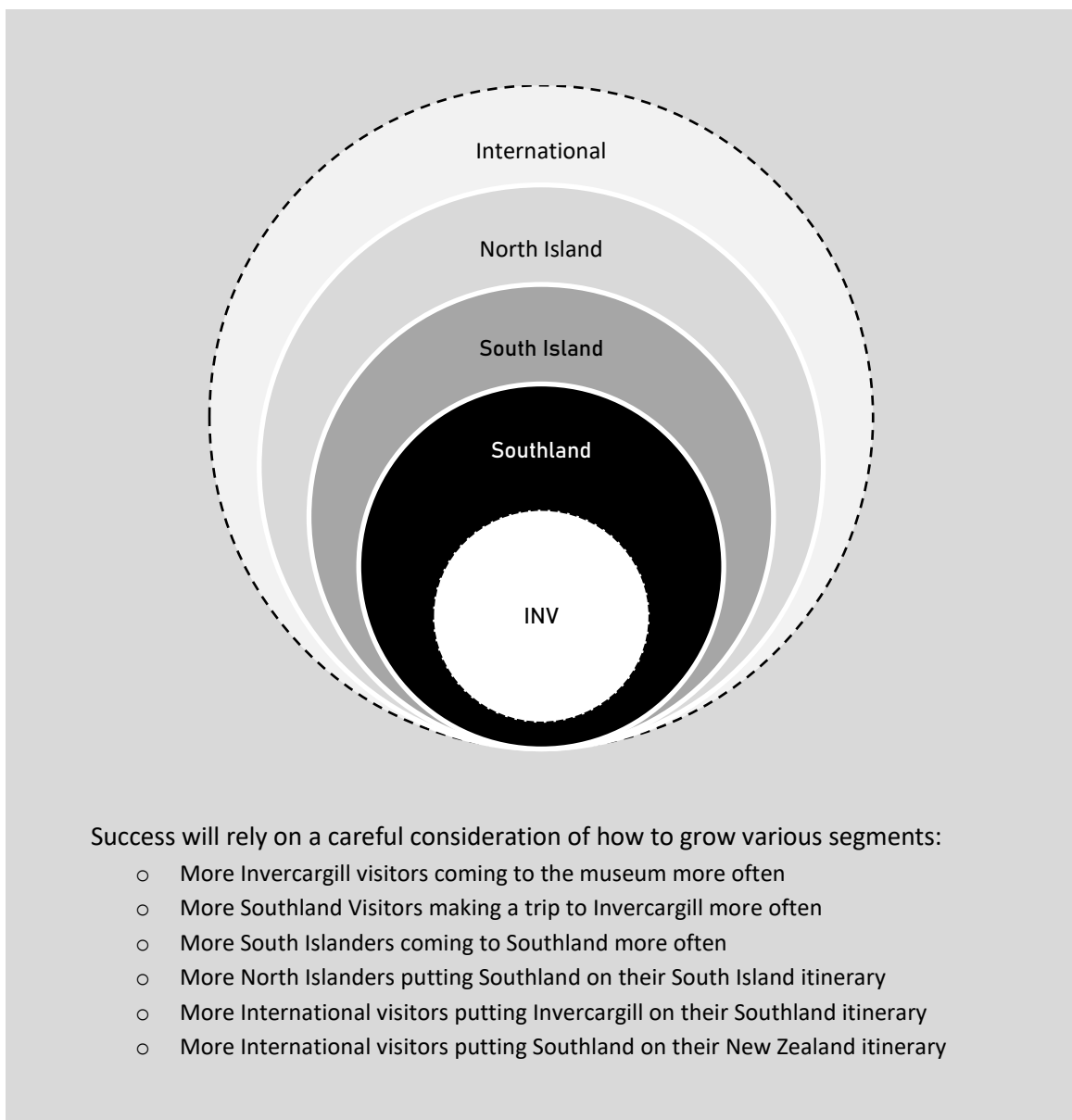
As reported in 2017¹⁷, while Southland's tourism sector has been one of the fastest growing in the country (with big increases to Te Anau and Fiordland), there are winners and losers across the region. Tourists spent \$62 million during April 2017 in Southland, a 15% increase on April 2016. However, the figures did not show an even spread of tourism growth across the region.

- Fiordland's tourism numbers grew by 16 per cent in 12 months, second only to the Wanaka Lakes District.

¹⁷ www.stuff.co.nz/southland-times/news/93027981/fiordland-leads-southlands-tourism-growth

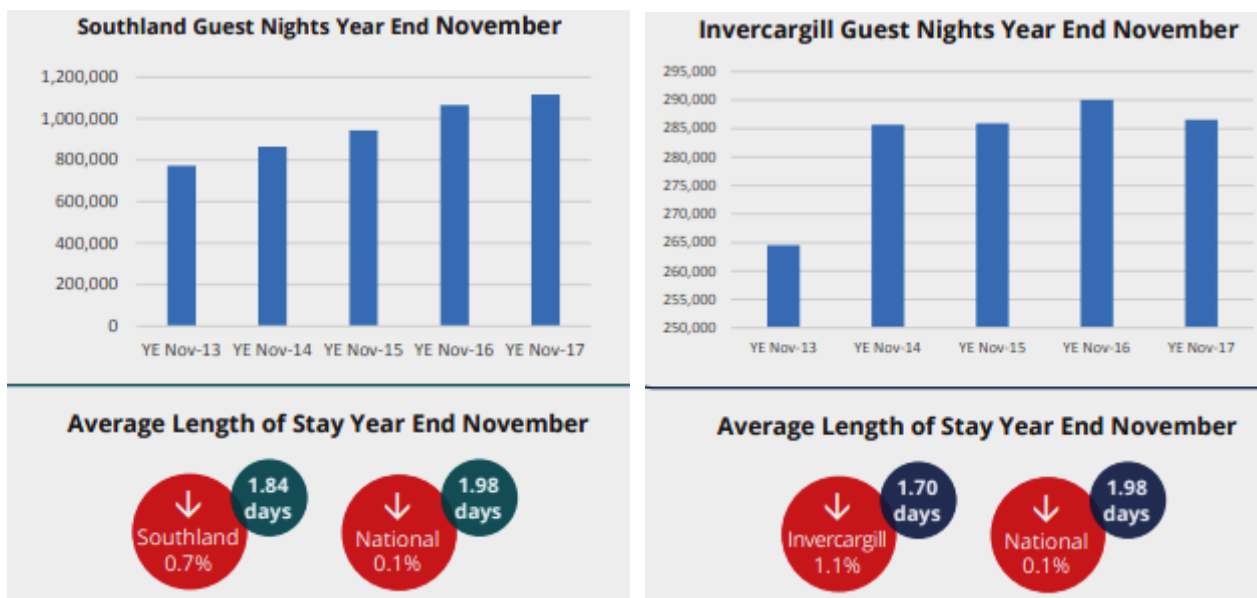
- Invercargill was the worst-performing territorial authority in the region in terms of growth, experiencing a drop in guest nights in February and only breaking even on tourism spending in March (compared to 2016 figures).

For Invercargill the real challenge has been attracting domestic tourists. While there has been a continuing growth in the international market in Invercargill, domestic tourists have remained a challenge. Venture Southland tourism team leader Warrick Low has noted the domestic tourist market was particularly competitive, having to contend not only with other New Zealand destinations but also cheap trans-Tasman flights.



Regional segmentation will be a critical part of developing a visitor strategy

“While much of the rest of Southland was perceived as an obvious tourist destination, attracting people to Invercargill would be a long-term project. For a long time, the highlights of Southland have always been those environmental mega-attractions. Invercargill has always been seen as a hub [but] we haven't always celebrated what's good about Invercargill. It's a long-term game, and it requires buy-in from the community and the business sector”.



Guest night trends - Venture Southland¹⁸

And yet across the country domestic tourists are spending more (\$21.4 billion of the total spending on tourism of \$36 billion in the year ended March 2017)¹⁹. In the same year the international tourist spending eased slightly to \$14.5 billion, down 0.9 %.

In 2008, a decade after Te Papa opened, Wellington’s guest nights had nearly doubled (from 999,107 at year end November 1997 to 1,866,467 at year end November 2007 (Statistics NZ: Commercial Accommodation Monitor). Visitor expenditure had also nearly doubled, with tourism spend in Wellington at \$679 million in 1999, and \$1.2 billion in 2007 (Ministry of Tourism: Tourism Forecasts)²⁰. While there are clearly differences in the scale of the capital spend and opportunity for Invercargill, Te Papa’s impact on Wellington’s tourism economy and brand (moving from the 5th highest guest nights region to the 2nd highest over the period) Te Papa’s success is relevant to reinventing the Southland Museum:

¹⁸<http://venturesouthland.co.nz/sites/default/files/media/documents/Key%20Tourism%20Indicators%20October-November%202017.pdf>

¹⁹ <https://www.stats.govt.nz/news/domestic-tourists-lead-to-spending-increase>

²⁰<http://www.scoop.co.nz/stories/AK0802/S00109/te-papa-museum-that-changed-wellington-tourism.htm?from-mobile=bottom-link-01>

- A less visitor-focused and non-strategic approach to investing \$300m in a national museum and art gallery would not have had a similar impact on the city's (international and domestic) tourism profile, reputational and success.
- A similarly bold, strategic and visitor-centred approach to investment in the Southland Museum will have a significant impact on the regional and national Invercargill tourism destination brand, and therefore on the Southland destination brand.

As long as it is managed in a rigorous and strategic way, investment in active people-focused facilities like the SM and ACI are among the most impactful initiatives local funders can take in terms of improving the brand perception of Invercargill (and Southland). This will rely on attention being paid to brand, programming and marketing approach and reach. A regular programme of changing exhibitions will build on the base proposition and provide a platform for the consistent roll-out of stories about a 21st C liveable and attractive city and region. As the social media team at Invercargill Libraries and Archives has shown, this can have a national and international reach.

Designing learning and leisure experiences people want to have

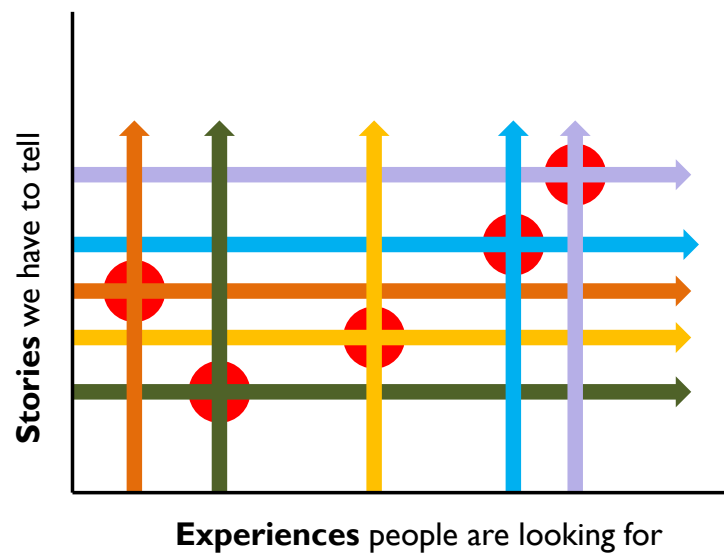
A recent business analysis of the New Zealand visitor economy product noted:

“The changes ... indicate changing preferences among New Zealanders and visitors for the types of recreation activity they want to participate in. There is **a clear shift toward outdoor activities** and away from traditional performing arts activities. Sandwiched in the middle of the growth profile are **museums and amusement parks, each with modest growth**...Exhibitions and events that **tap into the psyche of New Zealanders [and] exhibitions linked to New Zealand's history and culture seem to do far better** than those that might be more popular in Europe or North America.... **Outdoor activities...have been the strongest performers... People appear to be wanting more of what New Zealand is famous for – its great outdoors – and this is likely to be the driver of growth for local residents and visitors alike**²¹”

This is salutary advice regarding options for developing and activating the new SM - in a region principally known for its outdoor recreational experiences. In thinking about opportunities for people to access, engage in and be inspired by items of cultural heritage it is important to consider the relative opportunities of object-centred (and building based) and people-centred (and outdoors based) approaches. An object-centred approach will almost always favour an exhibition/museum format, and will generally focus on *teaching* people about the objects and the tradition they arose from. The result is often formal and educative in tone, with a focus on factual and informative text.

This can be a barrier for people who are seeking more recreational, interactive and social experiences – as part of a holiday or day off. This is pertinent in the context of a region like Southland, where many visitors are seeking shared, outdoor discovery and recreational experiences.

²¹ Westpac; *Institutional Insights report on Tourism, hospitality and recreation* March 2016



Finding the 'sweet spots': optimum experiences will rely on aligning the strengths its collections and stories in relation to the types of learning and leisure experiences locals and visitors are looking for

6.2.3 A digital (interconnected) mindset

The impact of digital technologies means that all future investment in cultural infrastructure needs to appropriately allow for the increasing importance of a digital world. This report does not set out to provide a full analysis of trends, but current issues with a bearing on infrastructure include:

- **Ultrafast broadband (UFB):** The provision of UFB will see increasing levels of use of the internet for a wider range of tasks. This will create growing demand for content, information and data the cultural sector is richly endowed with, providing opportunities for the sector.
- **The internet of things:** Advancing technologies will see the fabric of the built and digital environment change, offering advanced levels of connectivity to systems and services. This is likely to see the evolution of more 'personalised' spaces, individuals explore their personal recreational, learning, intellectual views and needs. More diverse forms of social connection will emerge and change more organically, across a range of physical and virtual locations.
- **Open data:** The focus for cultural organisations should be to provide data in industry standard formats so that developers can provide customer-centric access and programmes. This provides opportunities for organisations to work in partnerships focused on creating learning, engagement and research platforms and portals relevant to a growing range of Aucklanders.
- **Exponential growth in internet access:** When Ken Gorbey wrote his 2015 report 3.2 billion (45% of the world's population) were active internet users. By 2017 this was 4.1 billion (54%) million - predominantly through mobile-based internet connections. This parallels a similar growth in the global middle class, providing opportunities to attract engagement and visitation to Southland.

It is common to assume being 'digital' is based on digital technologies. But if this was the case, the changes we are seeing in a digital age would be more about new technologies rather than the digital 'disruption' that is changing the way we live. In many ways the impact of the digital age on the way people live, work and connect is having a bigger impact than the technologies themselves. And these impacts relate back to the idea of ecosystem introduced earlier in this report. As a leading thinker in future-proofing museums, Elizabeth Merritt, the founding director of the American *Center of the Future of Museums*, sees the real power of 'digital' as having allowed museums to have a "two-way communication with a much larger body of people". Without this she notes that museum staff need to talk in person to someone on the front desk, or correspond via email, letter or phone - "Suddenly, you were able to find out what people were interested in."

A digital mindset will be more important than digital technologies

Distinguishing between *digital thinking* and *digital technologies* will be critical to success. It is common to see Museums invest significant capital expenditure (and ongoing operational costs²²) in digital technology based on analog thinking (eg: touchscreens in galleries delivering traditional museum interpretation in a new form). This is a high-cost and low-value approach.

So what is digital thinking? And how does it differ from analog thinking?

Analog thinking

The term, which relates to 'analogy' is based on seeing one thing in relation to one other thing. It's a type of binary thinking; a 'hub' model. Some have said it's like using two-dimensional lenses to perceive a three-dimensional world. This includes thinking such as:

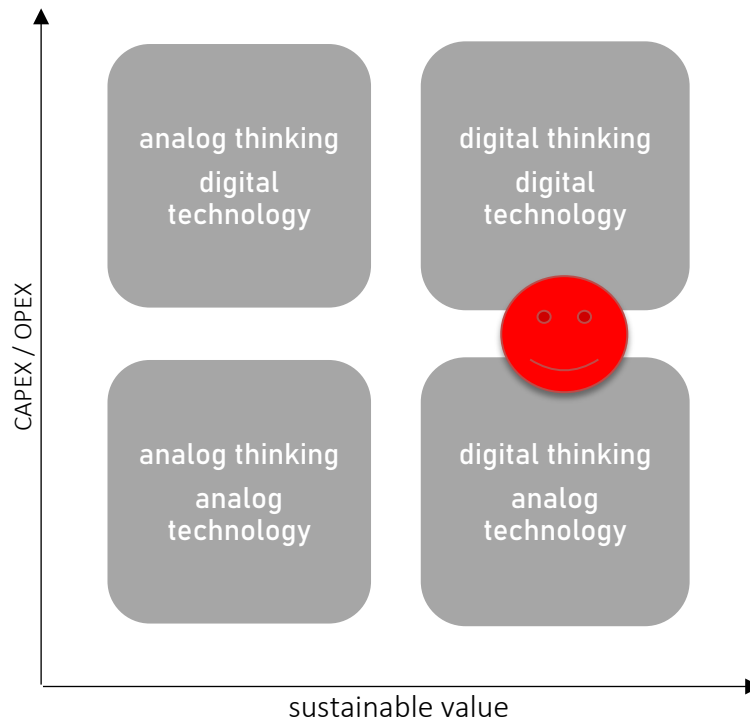
- Either A or B (rather than A and B)
- Teacher and learner (rather than shared learning)
- Exhibition and viewer (rather visitors as active co-creators of and participants, with others, in/of the experience)
- Right and wrong (eg: A Western Science viewpoint versus a Mataranga Māori viewpoint)

Digital (interconnected) thinking

- Digital thinking is essentially networked or interconnected thinking; it is ecosystem-based. It is focused on taking an 'outside-in' approach first - based on its communities' and visitors' voices

²² Craig Le Quesne, Te Papa's Chief Technology Officer cautions that 1) digital programmes in museums need to be renewed every 2-3 years, 2) content is costly and 3) and each in situ device (such as a touchscreen) requires 4 hours servicing per months

and preferences. Building on this an 'inside-out' approach should drive thinking, resource allocation and development. Clearly this is particularly critical for successfully operating as the recommended 'people-centred learning and leisure experience' model of Museum.



The 'sweet spot' for Southland museum is likely to be based on combining a 'digital thinking' culture with a mix of 'analog and digital' technologies

'Experience' is effectively the 'currency' of this approach (the organisation with the best experience will have a competitive advantage). Understanding its work from the outside defines strategic priorities for the Museum's investment, culture and prioritising resources. These should be based on:

- **Purpose/ outcome** – initially focusing not on a specific programme, service or experience but on something that represents a tangible change in people's lives, and/or the ability to do something that they could not do here before or do as well – or do anywhere else.
- **Experimentation** - as change continues, the museum's culture needs to be explorative and curious. Risk and 'failure' will be at time as important as tried-and-true and success.
- **Leverage of public resources** – these refers to existing, untapped resources and potential support. Sustainable success requires a culture of partnership and connection.
- **Open, connecting, collaborative** – ensuring access to the region and world's best thinking rather than remaining constrained within the limits of the organization.

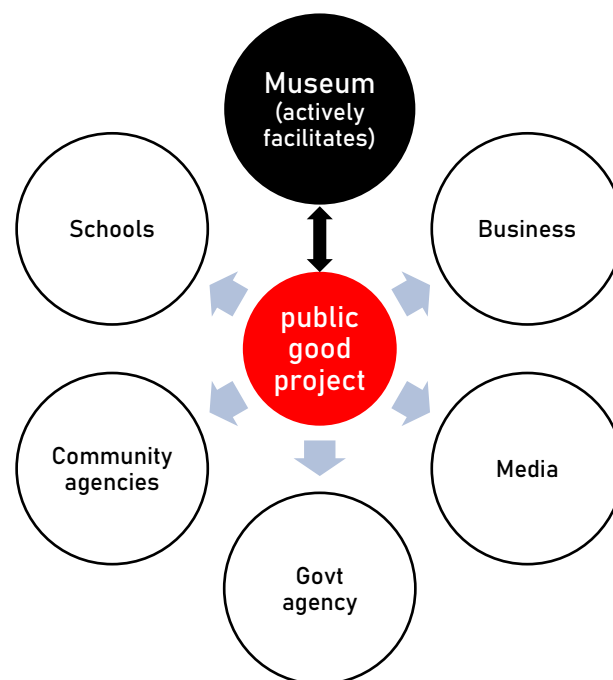
- **Lean and simple** - doing only what is needed to achieve the outcome as anything more adds needless cost and complexity.²³

Note: The *Our Tale NZ* report includes valuable and salutary insights into the issues at the heart of this. While there are many in Southland who are seeking high levels of interactivity in the new museum, there is also a level of caution about becoming 1) a circus and 2) 'too digital'.

It is important to separate out the ideas of 'interactivity' and 'digital'. Instead its useful to consider that interactivity can be contemplative and quiet, and that interactivity might be largely analog within the museum, and digital beyond its walls

6.2.4 Strategic partnership networks

Not-for-profit, community-owned organisations such as museums have significant opportunity to leverage win-win partnerships for community good. Whereas once philanthropy was the best way of cultural organisations gaining additional funding and resources, this has often limited the ways in which the museum could develop and opportunities for community involvement with their museum.



Patient Planet partnership model; Dowse Art Museum 1999

²³ This section references and is adapted from <https://www.accenture.com/us-en/blogs/blogs-thinking-digitally-different-thinking-you-are-digital>

Multi-sector partnerships

Not-for-profit, community-owned organisations such as SM are well-placed to facilitate conversations and win-win-win partnerships between itself and a community agency (such as a health or child charity), a business organisation, government agencies and community groups. A past example, initiated by an art museum and involving the NZ Police, a hospice, a business and schools,²⁴ resulted in benefits for all – and sustained relationships. It was the *museum's* partnership culture and initiative that opened up this opportunity for all parties.

There are many examples of what best practice looks like when museums and community organisations work with individuals and groups engaged in renewing their communities, investing in new forms of collective social activity and growing 'social capital'. In Southland the considerable investment in environmental issues and innovation provides an excellent opportunity for an outwardly focused, purpose-based museum to leverage joined-up impacts and outcomes. These might include:

- **Iwi:** revival of the Ngāi Tahu dialect, expressing a Māori cultural landscape 'presence', partnering with kura kaupapa, social enterprise, ngā marae
- **Regional tourism:** Curio Bay Tumu Toka, Natural Heritage Visitor Centre in the Catlins
- **Environmental:** Environment Southland's citizen scientist programme, NIWA predictive irrigation systems (with Iwi and Fonterra), Māui Studios 3D geo-mapping of customary landscapes and projections of sea-level change
- **Regional museums:** Southland is rich in museums, scattered all over the region. The RCS project is likely to improve the capability and accessibility of these collections and stories

An outline of considerations for partnerships with business is provided in Vol. 2 p18.

Win-win-win partnership opportunities

This section provides two examples of how a people-centred learning and leisure experience will generate new multiple bottom-line value.

A 'high energy attraction' visitor destination partnership

In its Tourism Development Strategy²⁵ Venture Southland outlines its focus on "...increasing visitor numbers by encouraging visitors to stay longer and spend more. In order to attract visitors, Southland needs high quality experiences... **New tourism operations can have an incredible impact on the region by creating jobs, contributing to the GDP, increasing an area's profile with domestic and international profile, while also protecting the environment and preserving cultural heritage**"

²⁴ Dowse Art Museum *Patient Planet* (200 famous photographs of the 20th C) exhibition – in partnership with Te Omanga Hospice, Toyota dealer, Hutt City secondary school students, the *Hutt News* and NZ Police charity cycling fundraiser.

²⁵ <http://venturesouthland.co.nz/services/tourism-services/tourism-product-development>

The SM project provides a fresh opportunity to look at how to better deliver community value AND significantly contribute to the city and region's success in visitor economy terms. In both cases success is most likely to be achieved through an approach which sees the Museum moving from seeing itself and operating as a largely 'passive' and inward-looking institution to being designed, staffed and operating as an 'active node' – connected to and activating existing and emerging networks across social, cultural, environmental and economic (including tourism) spheres.

Living Dinosaurs

In terms of the visitor economy, the *Living Dinosaurs* project has been seen as adding a much-needed commissionable product to the Invercargill offer. This would see it being designed and built by a commercial operator (with 50% of the CAPEX loan-funded by ICC and repaid over a period) before the Museum is redeveloped and then 'connected to the Museum's foyer' once the Museum has been reopened. This has a number of potential opportunities, issues and challenges:

- Cultural issues in relationship to the Tuatara (including the need for Ngāi Tahu and Ngāti Koata to confirm a partnership in relationship to their care and the raising revenue from their presence)
- The probability that a commercial operator's business case would locate food and retail services as part of *Living Dinosaurs*, undermining similar opportunities for the Museum (and impacting on bottom-line Museum OPEX costs to ratepayers)
- A less-than-the-sum-of-the-parts outcome in terms of cohesive building/ experience design
- Failing to fully realise a model in which the success of one operation will boost the other, and vice versa
- Possibly lessening the opportunity to discuss wider partnership models with parties like Ngāi Tahu, DOC and commercial operators.

A potential win-win-win model

In terms of developing a new commissionable product for Invercargill, if *Living Dinosaurs* is not viable, all or part of the redeveloped Southland Museum provides an opportunity. The challenge is that there are few 'community regional' museums in New Zealand that can viably levy a substantial entry charge. Where they do exist (eg the Lakes District Museum and Art Gallery in Arrowtown) the museum is usually located within a high foot-traffic tourism context where people expect to pay. So, an approach that sees the whole museum as a commissionable product is probably not the right approach in Invercargill.

The recommended approach is to look at the SM redevelopment as an opportunity to integrate a commissionable product (be that *Living Dinosaurs* or something else) as part of the overall visitor experience design - in a way that mitigates the risks outlined above and/or turns them into opportunities. Using this approach, the redevelopment has an opportunity to leverage shared investment in facility, content & platforms that collectively allow:

- **A 'Māori cultural landscape'** – the facility and its external and internal activation as an experience can express a powerful new 'narrative', renewing the reality of Invercargill and

Southland as a ‘Māori cultural landscape’ (Kaumatua Michael Skerrett has said that once the whole of Southland was a Māori cultural landscape and now “we are invisible”. He has also said that for Ngāi Tahu “investment is not just about economic return it’s about presence”)

- **A commissionable tourism product** - this could be a major high-impact exhibition in the apex gallery of the pyramid, telling a distinctive ‘Deep South’ narrative within a memorable experiential design (drawing on Southland talent like weavers and carvers, Sir Richard Taylor of WETA, Māui Studios Aotearoa, Rocketlab technologies etc)

Commercial operator(s)	Iwi	Council(s)/Community
<ul style="list-style-type: none"> • Location for investment in a commissionable product • Location to operate food, events, retail and other commercial opportunities (events etc)²⁶ • Partnerships with Invercargill accommodation providers, transport operators etc • Potential for visitor centre themeing/branding 	<ul style="list-style-type: none"> • The redeveloped museum as a strong definer of a Māori cultural landscape in Invercargill (External treatment of the pyramid, internal approach to manaaki & story)²⁷ • Increased employment opportunities for Māori • Increased relevance and programming in relationship to Māori • Opportunity for investment in a tourism property²⁸ • Potential for i-site themeing 	<ul style="list-style-type: none"> • Increased tourism visitation and spend (bed nights etc) • Lease and/or profit-share to increase revenue streams • Invercargill linked to a regional network of successful visitor experiences²⁹ • Ability to better connect regional museums to tourism network • Increased connection to value-chain/ pathways (SIT students, tourism employment etc) • Potential for I-site themeing

An indicative assessment of how the approach might leverage value for all parties

Benefits will include:

- **Return on investment** - for all parties this approach has the potential to generate value – for the commercial operator through a commissionable product (and potentially food and retail services), for the museum through lease and profit-share revenue and increased profile and visitation and for iwi, through presence and, commercial and employment opportunities.
- **Brand** – the redevelopment’s success will depend on the development and leveraging of a brand (not as a ‘logo’ but as a ‘story’ of people, place, pyramid, experiences and narratives)
- **Third-party partnerships** – there are expansive opportunities for partnership with other sectors and organisations such as **education/** SIT, schools; **environmental/**DOC, NIWA, Fish & Game etc; **Invercargill business/**accommodation and food & beverage etc; **community events** and festivals /Kidzone, Oyster Festival etc

²⁶ This would need to be contestable but there are obvious benefits to a single partnership between the Museum and a commercial operator

²⁷ This has been a strong focus in discussion with Ngāi Tahu kaumatua Michael Skerrett

²⁸ Ngāi Tahu Tourism may be interested in an opportunity to be the commercial partner

²⁹ A company like Real Journeys <https://www.realjourneys.co.nz/en/> has bases in all the parts of Southland that visitors currently connect with ahead of coming to Southland and visit. A partnership opportunity may exist to insert Invercargill into an ‘itinerary mindset’



Gallipoli; the scale of our war (Te Papa with WETA Studios) attracts entry queues each morning.



	Otago Community Trust Science Centre	Perpetual Guardian Planetarium	Science Centre + Planetarium COMBO
Adult	\$15	\$10	\$20
Child (3-18)	\$10	\$7	\$13
Family 2 adults + 2 children	\$45	\$34	\$60
Family 1 adult + 3 children	\$41	\$31	\$55
Student, Senior 65+, Community Card Holder with ID	\$14	\$9	\$18
Annual Pass: Adult	\$60		
Annual Pass: Child	\$40		
Annual Pass: Student, Senior 65+, Community Card Holder with ID	\$56		

The Tūhara Science Centre at Otago Museum is highly popular, despite an entry charge

A community 'youth leadership through play' partnership

Similarly conversations with Southland organisations show a high level of openness and enthusiasm for opportunities to work in partnership with a new SM. Sport Southland have recently created a dedicated role to lead an initiative in Invercargill and Bluff called **Play.sport**. Working collaboratively with primary schools in the Invercargill and Bluff area, "we will co-design an environment where new and better opportunities and initiatives are created to encourage young people to be physically active"³⁰. CEO Brendon McDermott sees great value in a new SM that is outward-focused, and as much about the now and the future as it is about the past;

"Maybe it shouldn't be called a museum? We keep having the same discussion - we're not really about 'sport', we're about being active, participation, and well-being".

Staff at Enrich were similarly enthusiastic. When asked, they had immediate ideas about how such partnerships could work in a win-win-win way³¹. Partnerships built around shared purpose – rather than traditional ideas of 'museum', 'school' or 'sport' – will leverage greater value from funding and resources already committed by each partner. As well, these kinds of approaches will enhance the ability for local community funders to support multiple outcomes through single projects, and joined-up thinking.

³⁰ Brendon McDermott, Sport Southland, in conversation with the author, October 2018

³¹ Marlene Campbell, Enrich, in conversation with the author October 2018

7. The strategic framework

The focus on purpose and impact was at the centre of the workshops with SMAG Board and staff as part of the ACI consultation. Based on that work this section further develops a strategic plan framework - including examples of how this would feed into operational and design approaches to guide the development and assessment of approaches and options. It aligns with the ACI purpose - 'We activate creative moments, so that people engage, connect and step up'

7.1 Purpose – what impacts does SM seek to have, on who, so that...?

we activate touch points

SO THAT

people engage, connect and step up

'Touch points' examples

Kānohi ki te kānohi / face to face (welcome and interactions)

Mentoring, teaching, sharing, learning

A co-design learning lab - Play / social / together

Feeling in the moment / 'live'

Interactive and social connections (onsite, online and offsite)

Whole brain learning - Memories of a lifetime

Connections with the past and the future

Immersion in the past / stepping into the future

Connect with the mauri of taonga and the experience

'In touch with myself'

'Step up' examples

Gaining confidence, skills – exercising leadership

'Future of work' readiness

Generating pride - Building esteem and connections

Facilitating CV-building and career paths

Marginalised or vulnerable citizens' wellbeing improves

Sharing knowledge, mentoring others

A public platform for expression and sharing ideas

7.2 Mission – what we do and how we work to achieve our purpose

- The Southland Museum works with communities, organisations and individuals to develop and deliver learning and leisure experiences relevant to Southlanders as people, and to Southland’s places and stories
- which inspire, challenge and resonate with us as Southlanders, and captivate our visitors

7.3 Values – the values & behaviours that underpin everything we do

- People-centred – Manaakitanga is key, everyone is respected
- Te Ao Māori is central to the way we work
- Collaborative and networked - as a team and in the wider world
- Co-leadership, co-learning, co-creation - we teach you, you teach us, you learn together
- Sustainable thriving futures – our work is underpinned by rigour and focused on value

Strategic Plan 2019-2025

By 2025 the Museum will:

- Be a successful, much-loved, highly visited³² people-centred learning & leisure visitor experience (open 2022)
- Have embedded Te Ao Māori at the centre of Southland(er)ness, and both at the centre of the Museum’s mission and story
- Operate as part of integrated and seamless service delivery, with the ACI and RSC
- Have a digital strategy and plan that has created deeper collaboration, engagement, connection and interaction – onsite, offsite and online
- Be an innovative ‘active laboratory’ through social learning & leisure experiences
- Be an ‘active’ node; facilitating a real and virtual ‘ecosystem’ –of partnerships, collaborations and interactions with and between communities, agencies, locations, museums and visitor experiences
- Be a sustainable organisation, delivering multiple bottom-line value for Southland and Southlanders
- Have positively impacted on a new and positive sense of Invercargill and Southland - locally and nationally

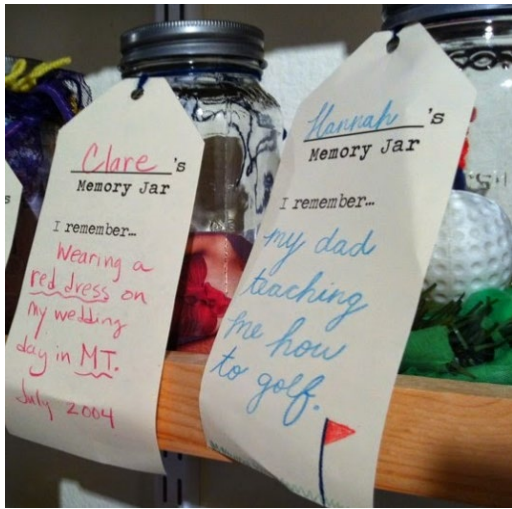
A high-level plan is included in Vol. 2 p 1

³² Onsite, offsite, online



Touch points are about people - as individuals and as social, learning beings. The Museums's collections remain a central priority – how they are seen, used and developed will evolve..





Touch points include community participation, live activities, ‘play’, relationships to/ownership of cultural collections and people contributing as ‘civic citizens’. They will draw on existing collections and lead to new acquisitions as ‘seen’ through a community’s values (eg the graf mural, rear of image top right, was acquired for a museum collection as the result of working with the national hip hop community)



Levels of Citizen Science

- Level 4 ‘Extreme’ • Collaborative Science – problem definition, data collection and analysis
- Level 3 ‘Participatory science’ • Participation in problem definition and data collection
- Level 2 ‘Distributed Intelligence’ • Citizens as basic interpreters
- Level 1 ‘Crowdsourcing’ • Citizens as sensors





Touch points are about emotions - engaging, memorable encounters and relatable human spaces and technologies. Technologies will range from simple *post-it* responses to Prince's *Purple Rain* costume (top left) to digital app portals like those at the Akron Art Museum (top right). Similarly, a focus on relevance and meaningfulness to the audiences will result in variety of approaches to experience development - collection-based as well as relying purely on other resources and technologies.



8. The conceptual approach

In 2015 Ken Gorbey's concept description outlined a recommended conceptual framework for a reinvented SMAG that "will;

- be reinvented as a magical experience of which all Southlanders and supporters can be immensely proud.
- be a place of excitement and fun; study and discourse; thought and contemplation; innovation and engagement; collaboration and partnership
- showcase the special nature of Southland identity, the achievements of people past and present, through our stories, and through collections. It will be an anchor that links and celebrates people, land and culture; a regional centre of identity. It will live in and be part of the contemporary world - holding to the commitment that it has much to contribute to Southland as a creative, cohesive, inventive and prosperous community that seeks to enhance its future.
- be a remarkable visitor experience that is exciting and engaging
- strengthen the community and help build an enriched future
- be a place where Southlanders strengthen their sense of identity as an inclusive, tolerant, healthy and cohesive community
- impact on the wealth for the wider community particularly as an attractor of domestic and international visitors

Gorbey, after liaising closely with the Board and Southland sector leaders in 2015, outlined a Single Organising idea for a redeveloped SMAG - *Our Southern Frontier*:

"This is about **Southland-ness and frontier-ness** and talks of a unique character and invites **an exploration of what Southlanders think of themselves** and how they place themselves **within the nation and the world**".

8.1 The importance of acknowledging 'world views'

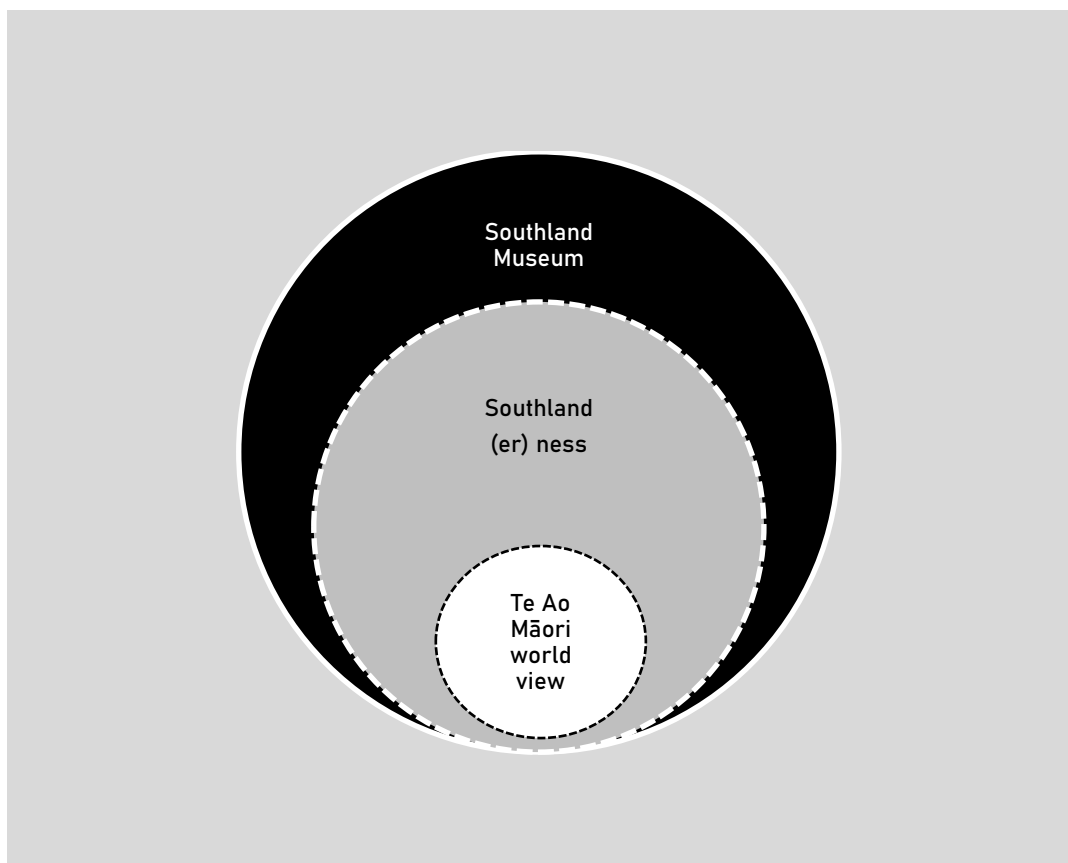
The *Our Southern Frontier* approach is endorsed for the redevelopment of the museum. It brings together the critical components of story, operating model and value proposition and aligns in key respects with what the community have expressed through consultation. The *Our Tale NZ* research showed:

- the top thematic preference was **Explore Identity** – "Helping people know more of who they are through connection to the past, and through this, growing personal pride and courage were mentioned by a lot of participants as the reasons why the museum was important to them". '
- the top exhibition subject preferences were '**The story of Southland**' and '**Māori History**', and various aspects focused on Southland and the sub-Antarctic Islands
- the top current-feature preference (by far) was the **Tuatara**

Building on this, it is useful to consider the approach in light of:

- the future-focused, multiple bottom-line opportunities and drivers as they appear in 2018
- the Te Ao Māori, audiences, digital and strategic partnership lenses

The *Our Tale NZ* research shows a not unexpected focus on Māori as a ‘historical’ - rather than as a contemporary - society. This is likely to be partly because of the way museums embed and perpetuate this world view - defining what stories museums should tell and how. The research also includes a call for ‘Māori to tell their own stories’ – though it is not clear if this means historical stories, or could mean a Māori perspective on everything. Moving forward, the default ‘museum worldview’ on natural and human history needs to be carefully reconsidered. This includes exploring the idea that that the stories museums tell are impartial (in reality they prioritise some world views and stories over others, and marginalise or exclude others). It is also an opportunity to explore the idea knowledge is collectively held by people inside and outside of the museum moving from SM being just a source of *information* to also becoming a conduit and facilitator of *knowledge* – wherever it might be held and in whoever’s voice and world view it might be expressed or framed.



Placing Te Ao Māori at the centre of the story is central to the recommended approach

It is recommended that Te Ao Māori (Māori world views, as expressed by mana whenua to the region) is placed at the heart of the museum moving forward. This does not necessarily just mean a focus on more Māori content (ie more carvings and adzes). Rather it means considering all aspects of the museum through a Te Ao Māori lens – from the qualities that define the museum’s manaaki (welcome, care) to visitors, to the value of relationships and partnerships, to the kaitiakitanga (guardianship and

care in its widest sense) of collections, stories, people and places. This is seen as a significant and timely acknowledgement of:

- the importance of iwi as Mana Whenua
- the manaaki shown by Māori to early Pākehā settlers without which settlement is likely to have failed (many have commented that this is seen as being at the centre of the specific relationship between the two groups in Southland)
- the kaupapa base of the 'Taonga Species' Tuatara breeding and live exhibits programme, with Ngāi Tahu - and through them Ngāti Koata - and DOC
- the importance Southlanders feel at extending a similar quality of Manaaki to visitors

By placing this idea at the heart of the new SM culture, there is an exceptional opportunity for the museum to:

- put people at the heart of the museum
- gain a reputation for an exceptional visitor experience
- build pride and engagement by local people in Southland(er)ness
- develop a clear point-of-difference that will enhance the profile and reputation of the region
- provide an experience that more people will want to experience, and one they will value more - enhancing word-of-mouth and social media endorsements

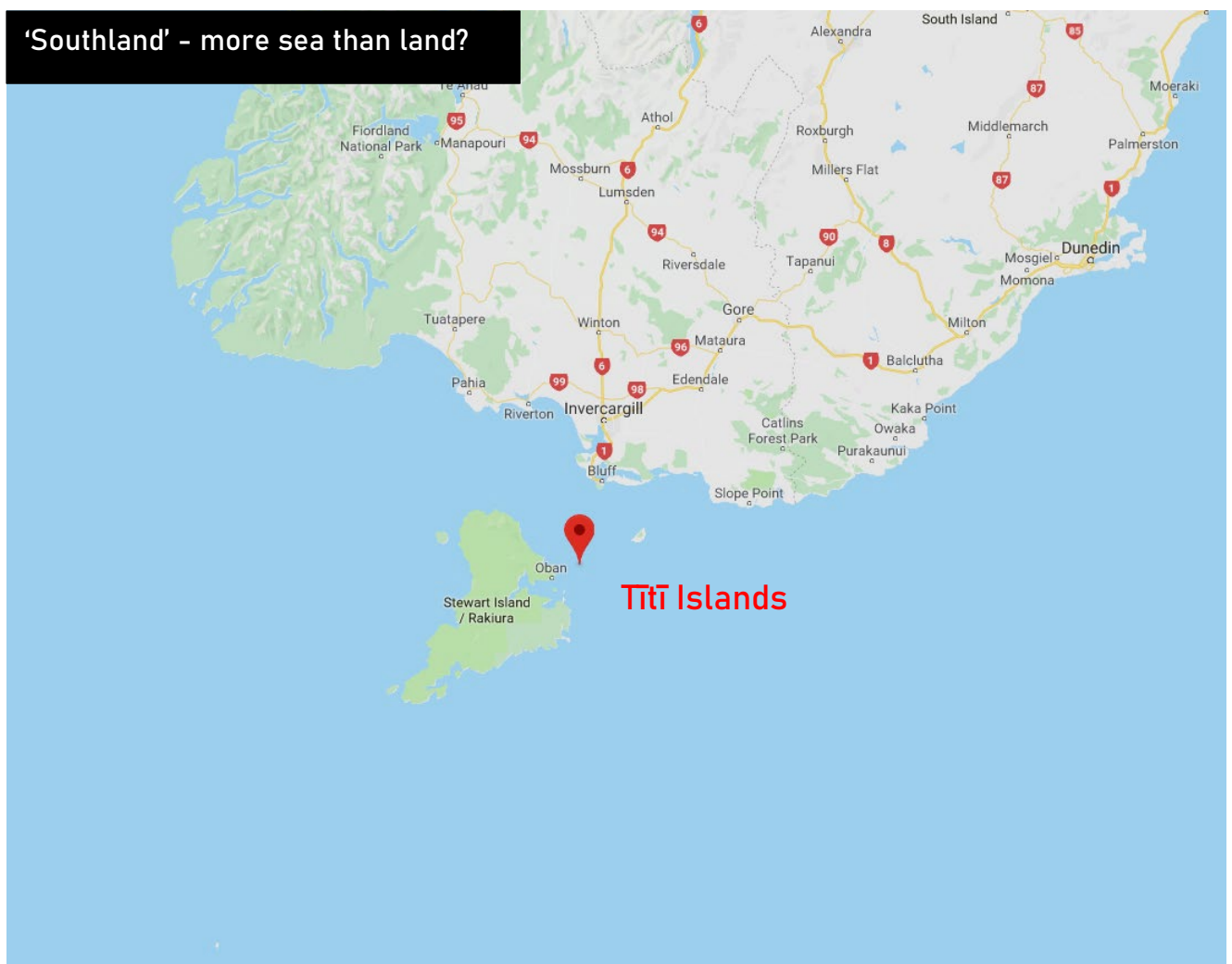
8.2 Deep South, Deep Time; Our Southern Frontier

There is an opportunity to develop the *Our Southern Frontier* proposition in a way that will deliver advantages in terms of community pride, competitive point-of-difference and delivering a 'must see', 'must do' experience more visitors will want to come to Invercargill and Southland to see. By interrogating the idea that 'museum equals the truth' and taking the opportunity to examine different world-views (including visitors' own), there will be advantage in assessing the idea of **Deep South, Deep Time – Our Southern Frontier**.

- **Deep South:** A traditional 'Mercator Projection' map of the world (centred on Germany, the homeland of its creator) is an expression of his cultural 'world view'. It assumes that the Northern Hemisphere is the 'top' of the world. As well as reflecting a Eurocentric view of the planet, it distorts the relative size of land masses. The alternative map shown on 49 uses the international dateline (and therefore the Pacific Ocean) at the centre. And it assumes that the South Pole is the top of the world. In a Te Ao Māori world view Rakiura/Stewart Island is at the head of the waka (Te Wai Pounamu/South Island). And oral traditions record Kūpe heading south towards the 'top of the world'
- **Deep Time:** If the timeline of earth were mapped onto the human arm, it would begin around the shoulder where the earth formed about 4.6 billion years ago (see page 50). Animals originated within the palm, but most of the species alive today arrived around the first knuckle in the Cambrian period. Similarly, if the 4.6 billion years period is seen 46-years, the Industrial Revolution was 1 minute long, 1 minute ago. Typically, the stories museums tell are centred on this short period, and this colonial perspective of settlement and industry reinforces an idea of Māori as a 'historical' people, expressed principally in relation to Pākehā settlement. A western

scientific approach to natural history predating human history typically overrides Mātauranga Māori.

For iwi the Tītī Islands are in the heart of the region, surrounded by more sea than land. The Tītī harvest is the longest continuous cultural food gathering practice on the planet. Tītī and kaimoana were historically essential to southern South Island iwi because the land in the region traditionally provided little sustenance. They remain essential in terms of cultural identity. Tītī fly 64,000 km a year, nine days without a stop, to get to the waters around the Tītī Islands. In recent years as they have arrived the food supply is growing scarcer. As climate change impacts increase, the food they need is being pushed further south³³.



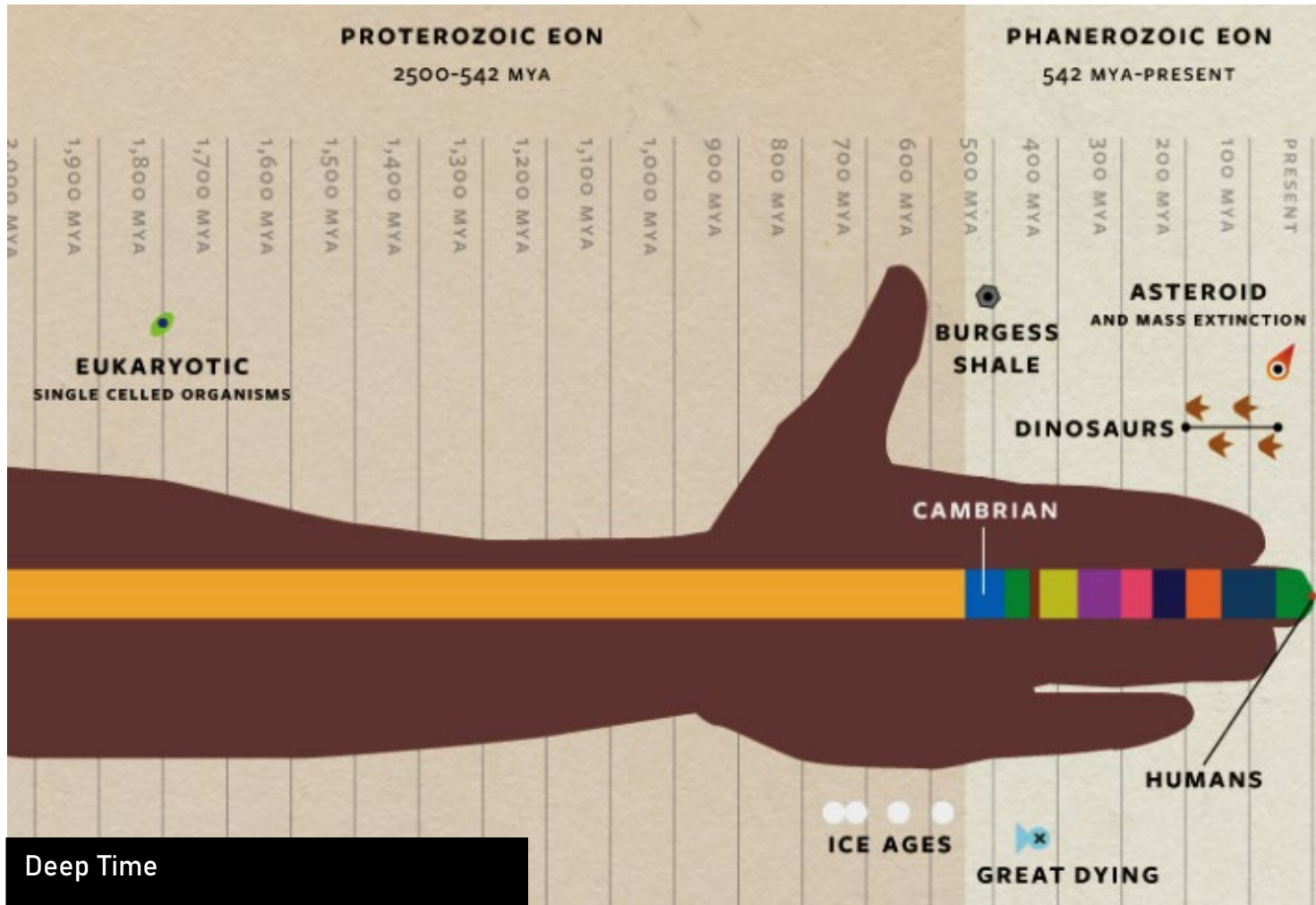
³³ From a conversation with Ngāi Tahu kaumatua Michael Skerrett, 2018

The top of the world!



Interrogating a Eurocentric world view

Placing the new SM and the 'Deep South' Southland Story at the 'top of the world' will provide a distinctive opportunity and advantage.



A *Deep Time* scale will be an increasingly important lens as the state of the planet moves from an underpinning to an overarching discussion. This may see the SM story focus shift from the ‘progress of the Industrial Revolution’ and the extraction-based industry wealth model that grew from it.

9. The programme approaches

The SM programming approach should be:

- **People-centred** – curating experiences that are relevant and meaningful to people’s experiential preferences and learning interests
- **Built on proof-points** – stories and experiences which have been highly successful for years will continue to be. Build on their success in new ways for new audiences.
- **Purpose-based** – designed to deliver the impacts the museum is intentional about
- **Co-developed** - with partners and community participants where appropriate
- **Balanced** – combining a mix of long-term programmes supplemented by changing programmes across a range of experience types and difference audience’s preferences:

EXPERIENCE TYPES

- exhibitions, events, public programmes, online programmes and dispersed offsite programmes
- in-house and touring programmes
- active, contemplative, participatory and didactic programmes

AUDIENCES

- projects developed specifically for the different demographic and psychographic groups that make up the local population and targeted non-local visitors
- projects developed to encourage sharing of skills between different groups
- projects that engage multi-generational groups and individuals in shared experiences

9.1 Playing to existing strengths

As the SM builds the new story and experience proposition it will be critical that to retains and further enhance features that are central to its success.

Tuatarium

Live exhibits such as the Tuatara are a singular expression of the ‘touch points’ that will be central to the museum’s purpose. It is currently an important point-of-difference, and this should be enhanced through the application of approaches outlined in this report. A Te Ao Māori world view will be critical to the next stages of this project – working with Ngāi Tahu, and through them Ngāti Koata - and with DOC, to identify the partnership framework that will best secure this important breeding and engagement project of a taonga species. It will be particularly important to ensure the partnership facilitates the placement of tuatara from the breeding programme to approved sites across New Zealand. It is questionable whether SM should continue, in the future, to maintain and operate a second site to house these animals.

The Tuatarium should be developed as a visitor experience that maximises the ability of people to have appropriate contact with the animals, within the terms of an agreement with Iwi and DOC. This may in time include other taonga species, such as the Kakapō, if a suitable and sustainable approach to partnership and engagement can be developed in alignment with the strategic purpose and objectives of the SM. As the only survivors of an ancient lineage of reptiles

(dating back 200 million years ago) Tuatara reinforce a ‘deep time’ narrative, even though the animals are not connected to the ‘deep south’.

Note: using the revised purpose as a framework, the Museum should review its active breeding programme, which is unsustainable; particularly if this initiative 1) requires the ongoing financial commitment to an offsite live facility and/or 2) is not directly¹ supported by partnerships with DOC or others, or aligned with iwi interests.

Sub-Antarctic Islands

The community consultation shows a level of support and interest in retaining and further developing this subject as a focus area. While comments about it are often centred on the animated ‘scary seal’ and the ‘rocking boat’ (which, with the tuatara, stand out as kinetic visitor experiences in an otherwise largely static museum) the theme surfaces in other conversations within the research report and in other conversations. It will be a key component of the ‘deep south, deep time’ proposition.



The *Our Tale NZ* research reinforces the popularity of the tuatara and sub-Antarctic islands

9.2 Purpose-based programming

This approach is based on thinking about the impact or outcome being sought and the audience the organisation is working with or seeking to engage. Based on this, a number of possible product or experience types are assessed, to identify the one that is best suited to resulting in the impact sought. To be successful the approach should carefully consider who the programme is for and what its intended impact or outcome is.

Based on this the approach should consider experiential and content options. Where the latter are predetermined care should be taken to consider which audiences, they are being developed for and what approach to delivery will be most successful. While a purpose-based approach to programming is the opposite of simply doing exhibitions *about* A or B (in favour of experiences that have X or Y impacts on specific audiences) it does not prevent content relating to specific stories or collections.

As noted in the *Our Tale NZ* research findings noted below, audience preferences are as much about experience type and impact as they are about content. In terms of subject and content, the research noted interest (in order) in:

- **Story of Southland** – This received a lot more than any other exhibition theme -usually mentioned in addition to existing exhibitions such as Natural History, Māori, sub Antarctic etc.
- **Māori history** was the second most mentioned area after the Southland Story, which it is also part of.
- **History** - War history and ‘war stuff’ got several mentions from children – and this could have been because they liked the WW1 exhibition so much.
- **Science** - Including a technology museum and innovation hub. Interactive, fun science – similar to Science Alive at the Dunedin museum
- **Roaring 40s/sub Antarctic** – the seal was a big favourite as was the sub Antarctic area general. This was seen as an opportunity for big scale digital presentation
- **Natural history - Fossils and dinosaurs** and real dinosaur bones (very strong interest). Other requests included Southlands conservation history up to present conservation work and the environment including Ulva Island and Fiordland biodiversity
- **Industry/Maritime - Shipwrecks** including the rocking boat; sailing and migration, maritime history including Stewart Island, whaling, transport, coalmining and gold mining
- Plus, art, ‘multicultural’, astronomy, the collections and a range of other topics.

9.3 Curating new experiences

‘Curating’ is typically seen as a Museum function. Museum curators are seen as people who select and arrange items from a collection, or items drawn from beyond the collection, to create exhibitions. But the usage of the word in contemporary dictionaries is extending well beyond this, and often omitting museums altogether.

Curate

Verb

To select items from among a large number of possibilities for other people to consume and enjoy; applied to many areas including music, design, fashion, and especially digital media

www.macmillandictionary.com

Indeed, extending this idea of a ‘large number of possibilities’ further – to include a wider range of the resources, agencies, places and stories of Southland as a whole - there are other ways in which a future-focused and people-centred museum might curate experiences. As Elizabeth Merritt has written:

“Museums can help curate the world for grown-ups, too. In the future, augmented reality devices could help adults explore both their own neighborhoods and new places when they travel... and museums could provide the technical and content expertise to **help people catalog and share more things than could ever be included in any museum’s own collections.** The Internet of Things (IoT) will enable the documentation of archaeological sites and artifacts around the world, and an IoT-powered global family archive could mean that historians could capture stories that would have been lost in the past”³⁴.

In terms of tourism and recreational experiences the idea of ‘curated experiences’ is seen as a significant future trend. More people are looking for outdoor ‘in situ’ experiences that include remarkable sites, great food and beverages, encounters with local people and learning about natural and cultural heritage. This is reinforced as online travel brands (including TripAdvisor and Airbnb) are evolving from booking engines to experience platforms³⁵

“Home-sharing firm Airbnb also ventured into curated experiences last year by launching Trips in March 2017. These are typically led by locals and include unique experiences.

“Airbnb Trips is a **people-powered platform, bringing together a community of local**

³⁴ www.miscmagazine.com/elizabeth-merritt-future-museums Merritt notes that “physical museums, from art museums to zoos, will remain important as well. As they continue to improve, museums can act as a form of respite and retreat from everyday stress, digital overload, and traumatic events”

³⁵ www.livemint.com/Leisure/HzIsTOP4rA7qXHuoKsoYfK/Curated-experiences-are-the-next-big-travel-trend.html

experts to share insights about a place, which helps travellers feel like they belong. It allows local people to participate and benefit from tourism by sharing their interests and passions, while enabling them to make a little extra money.”³⁶.

Operating as the outward-looking and networked organisation recommended in this report, the SM will have an opportunity to prioritised a strategic set of ‘curated museum-related’ experiences through partnership with other agencies. This might include:

- Coordinating with RCS and museums to develop a directory of GPS-located images, information and videos of collection items - which activate when the viewer is in the home location of that taonga or artefact
- Curating ½-day, 1 day or overnight itineraries which follow a cultural and/or natural history narrative. These might include specific food and accommodation recommendations based on authentic cultural encounters and narratives
- Partnering with iwi to ‘curate’ marae experiences, which might include opportunities for young people from the marae to ‘step up’
- Coordinating with visitor-experience operators and/or agencies such as DOC, and iwi, to connect up various experiences/places within an overall narrative
- Developing interpretive and immersive experiences (including VR, AR etc) of narratives within the landscapes they relate to
- Curating excursions to a series of regional museums and/or sites of natural significance, and augmenting these with information, other fun or interesting things to do along the way, interactive activities (such as quiz or children’s activities etc)
- Working with Airbnb, TripAdvisor etc as outlined above

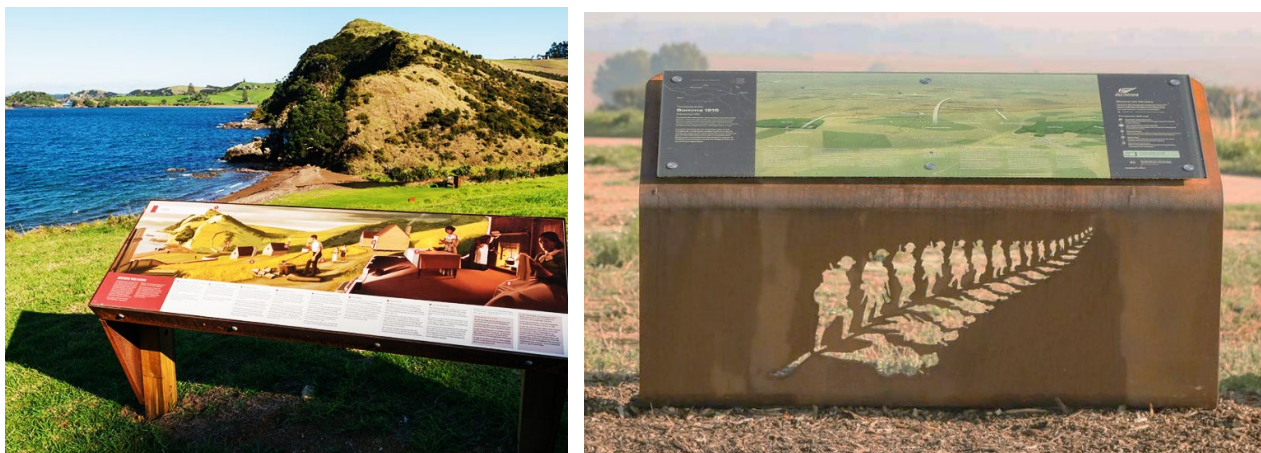
Curating of this type moves beyond a traditional ‘guide book/sheet’ which outlines, for example, every regional museum, to considering specific audiences’ preferences, timeframes, content and narratives, commercial and cultural partnerships etc. The SM is well placed to play a central role in building such experiences, some of which might be renewed or replaced seasonally or annually. These experiences can be simple, cheap analog solutions or more expensive, highly compelling VR, AR, AI digital solutions.

Note: The use of the word ‘curate’ in this context is not intended to suggest that the role of ‘curators’ as they are currently defined would expand to be (solely) responsible for the development of such experiences. More it suggests that the way museums use the terms ‘curate’ and ‘curator’ needs to evolve.

Instead it is suggesting that the museum team, working creatively and collabaratively, have a focus on new ways of engaging the community and visitors, aligned with their interests (in terms of content and experience types). This might include differnet mixes of staff with skills in Te Ao Māori, digital technologies, concept development, interpretation, subject expertise, community partnerships, revenue and communications, for example.

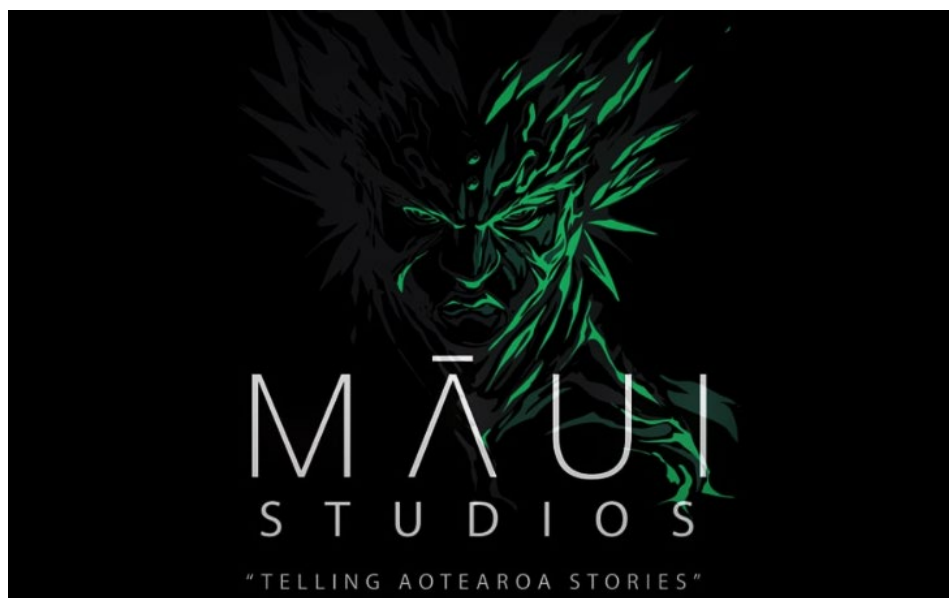
³⁶ Op cit

A company like *Locales*³⁷ creates “visitor experiences through storytelling. A multi-disciplinary approach ensures visitors engage with world-class experiences at every stage of their journey”. Their work includes multidisciplinary (static and digital) interpretation in situ.



Rangihoua (above left) and *Ngā Tapūwae* on the Northern Front in Western Europe (*Locales*)

Madison Henry (Ngāi Tahu, Bluff) is one of the 3 directors of *Māui Studios Aotearoa*³⁸. Their current work includes 3D imaging of pā sites as a basis for modelling the impacts of climate change and sea level rise. From this they will frame questions about the future location of marae, settlement sites and architecture as conditions change. This approach, together with their work in AR, AI and AR, offers rich opportunities to engage audiences in cultural landscapes, climate change, architecture etc – well beyond the walls of the museum.



Companies with connections to local people, landscapes and stories will have a key role to play
(Māui Studios Aotearoa)

³⁷ <https://locales.co.nz/>

³⁸ www.mauistudios.co.nz

North Head/Maungauika

Spend a great day uncovering the mysteries of Auckland's secret lookout

North Head/Maungauika is a strategic headland at the mouth of Auckland's Waitemata Harbour.

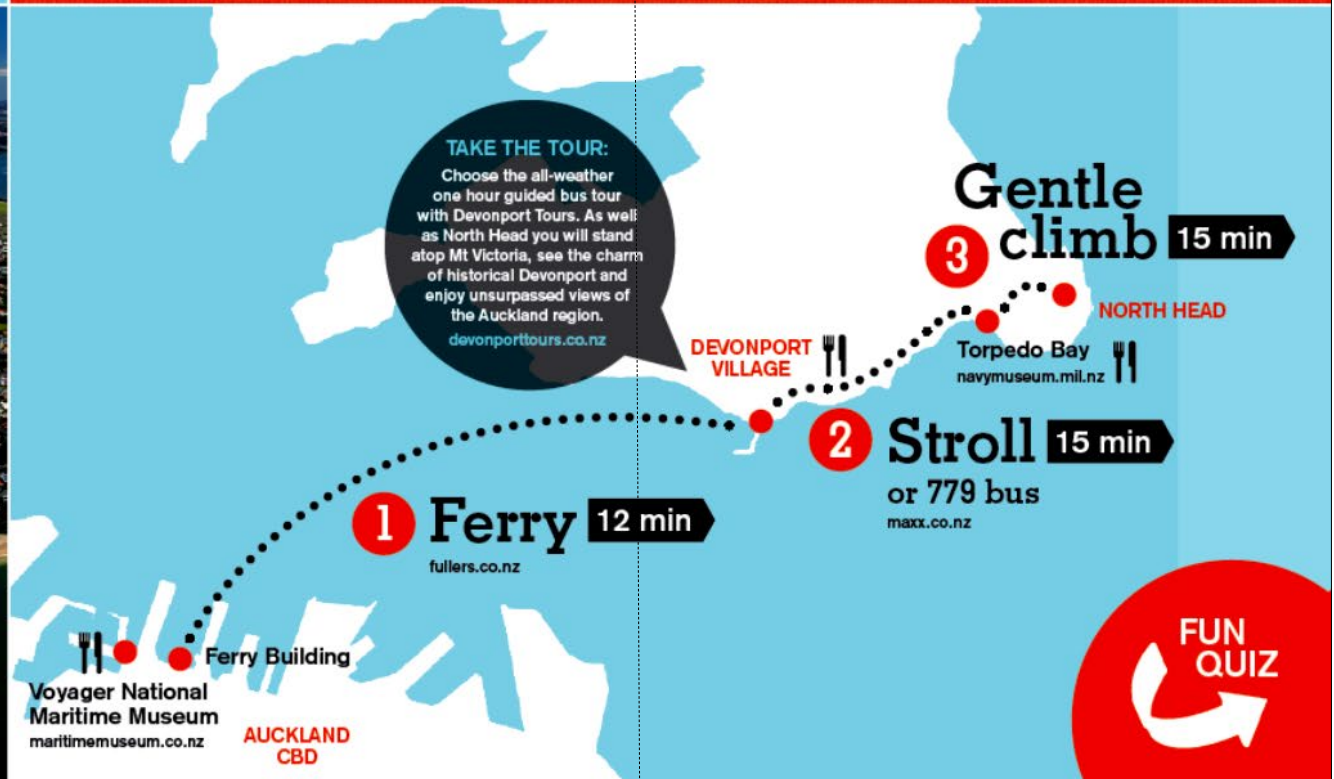
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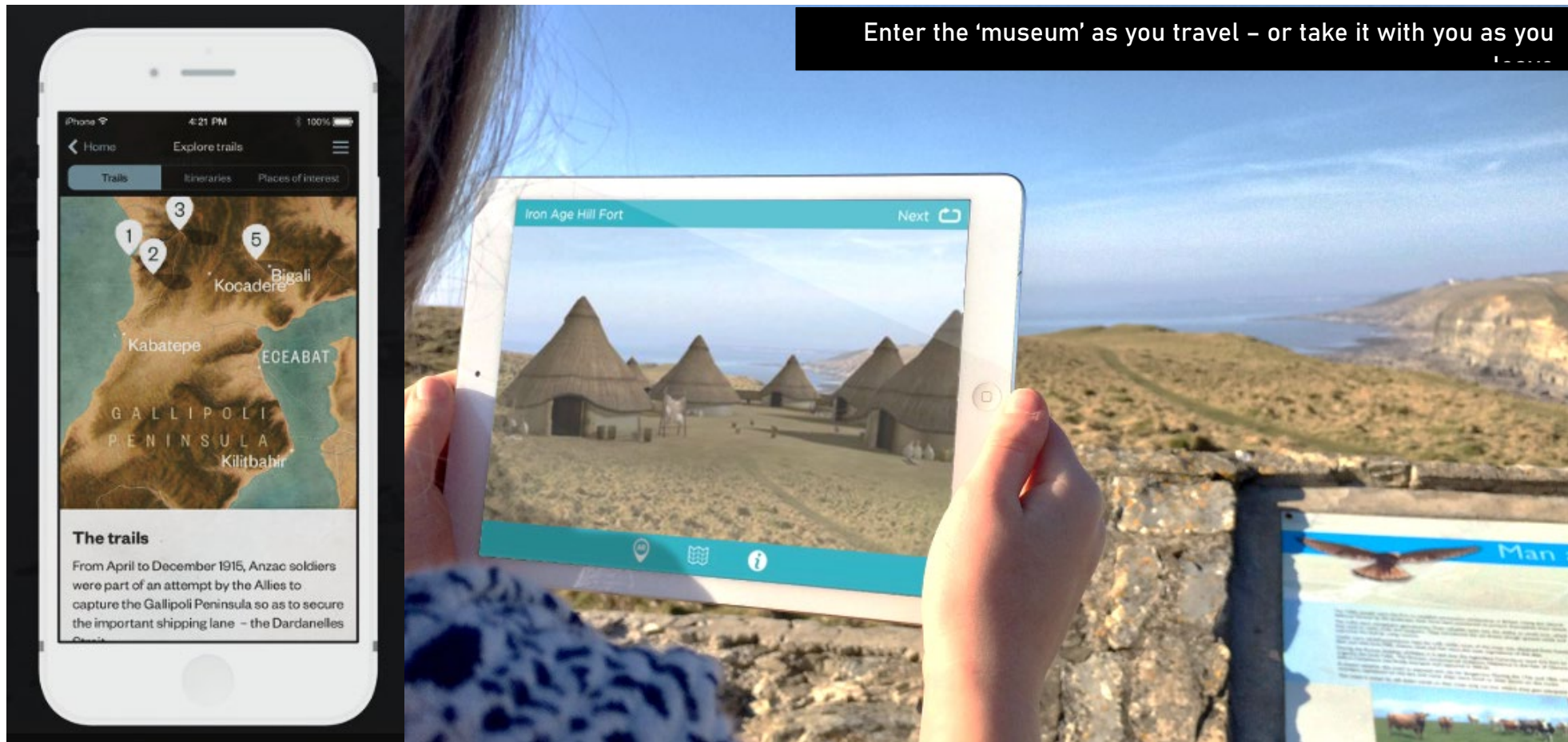
The commanding views over far horizons which any enemy needed to cross – and upper harbour (and now over the modern city) – have made it an important defense site for centuries. It's a place of tunnels, fortifications, an amazing 'disappearing' gun and many startling stories...

ANALOG - a simple A4 bifold 'curated heritage experience' in the landscape (developed by the author and Quality Tourism Ltd for DOC and MCH).

Explore our beautiful harbour and the best views of the city, the harbour and the magnificent Hauraki Gulf

North Head aerial image © davidwallphoto.com





DIGITAL - Through partnerships there will be opportunities to develop experiences that take the museum beyond the building. These can transform engagement with and understanding of the natural world, a Māori customary landscape, the places where stories actually happened etc.

9.4 Temporary experiences

The SMAG approach to temporary programmes has been based around art exhibitions. This has meant that content and experiences relating to history, Māori and other ‘museum’ topics has largely been ‘frozen’ in the long-term exhibitions. Exceptions have been touring exhibitions from elsewhere and projects which have attracted external funding, such as the WWI exhibition, supported through the WW1 Commission funding programme of the Manatū Taonga; Ministry for Culture and Heritage.

The community is asking for a higher level of changing exhibitions. Despite some who will mourn the loss of the current almost ‘permanent’ exhibitions, a greater percentage of the current audiences are likely to welcome a degree of change. And many people who have never been to the Museum, or who have not been for an extended period, will respond to changing programmes that are more aligned to a wider range of interest and topics. While the constant provision of art exhibitions has attracted return audiences, the *Our Tale NZ* research aligns with most museum visitor research to suggest that art is not the topic of greatest interest to the greatest number of people. It will be important to balance between exhibitions about Southland and Southlanders, and experiences that Southlanders want to have. These will not all be about Southland; a balanced mix of projects relevant to people based on demographic and psychographic preferences is required to balance the tried-and-true with the more experimental and bolder.

Note: the range of experience types should be more varied than simply relying on ‘exhibitions’ with add-on public programmes. For example, youth audiences might warrant ‘experience’ investment in online projects or outdoors music events, rather than an ‘exhibition’ about contemporary music or one with digital interactives.

Thought should be given to ensuring the public spaces in the new SM include flexible spaces, configurable to provide of a range of different sizes. Smaller change-out spaces (including visible storage and feature exhibition areas) within a more flexible and reconfigurable set of exhibition spaces will allow regular refreshment and new projects of a scale that can be sustained. By only having relatively large exhibition spaces at the moment, the SMAG staff are committed to devoting considerable resources to maintaining a changing programme.

Even if the ACI becomes the principal home for art and creativity, artworks or projects are sure to be shown at the SM. When they are, it will be based on purpose and topic rather than media – for example an exhibition by artists responding to climate change might be better featured at SM than ACI. The team will have options to be creative about how they manage this. As well, the ACI and SM should explore and maximise the value of projects that feature in both venues, or approaches that encourage visitors to one to visit the other through complementary programming.

As with the overall SM approach, partnerships – with communities, exhibitors, other museums, youth groups, collectors etc – should be a key part of temporary programming. Opportunities to co-create content with others, and/or develop participative experiences should be prioritised on a regular basis.



Temporary programming should be based on Southland stories, and things Southlanders want to experience – these are not always the same thing!
Working with a people-centred approach, the programme should be a strategic balance of collection-based, non-collection-based and touring projects





Partnering with local events, outdoor 'play' & indoor learning environments for children (eg Minecraft), live exhibits, cultural storytelling using contemporary technologies and social 'hang-out' opportunities for youth and adults will all be important. Collections-based learning approaches will still be an important priority.

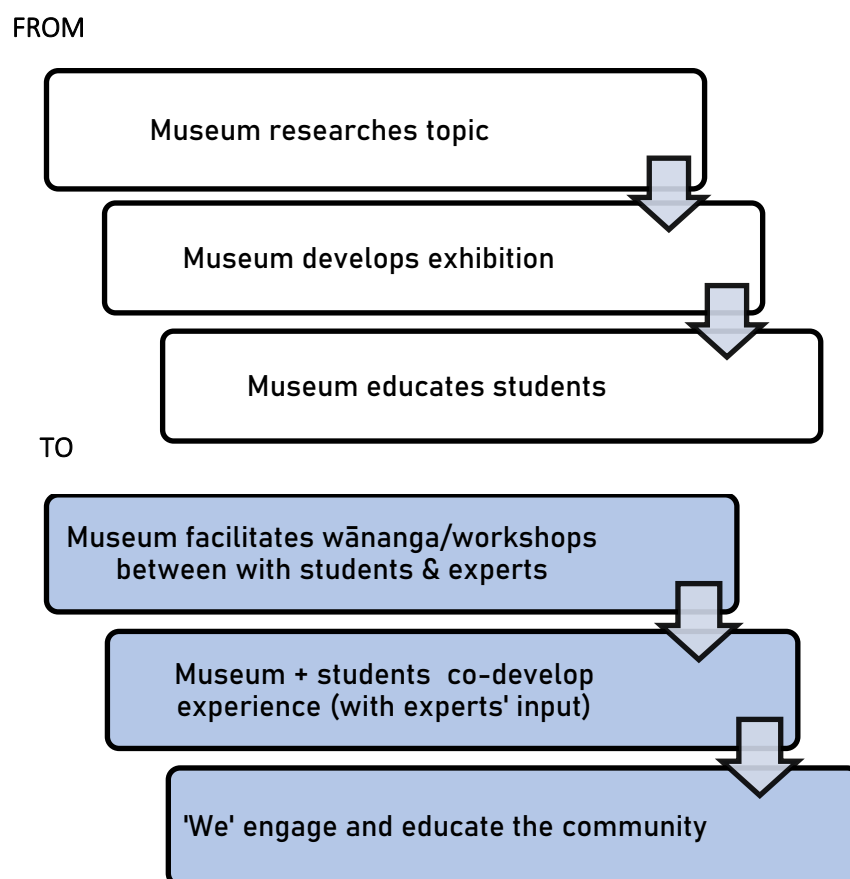


9.5 An innovative 'active laboratory' learning organisation and culture

The shift from an analog thinking to a digital thinking approach will 'flip' aspects of the operating model. In the case of an outcome designed to engage and educate the community in climate change, for example, moving from a traditional 'analog-thinking 'story-telling' approach to a 'digital-thinking' co-design and co-create 'story-making' approach, with the Museum facilitating relationships between students and experts³⁹

An example; climate change project

In a traditional 'product-centric' model, a museum would research and develop an exhibition (the 'product') on a topic like climate change, and then run lessons for students in the exhibition about. A 'digital thinking' approach might, for example, 'flip' this approach, as below:



In this model, the purpose – 'we activate touch points so that people engage, connect and step up – is clearly expressed, and result is the museum becoming a platform for student expression, co-design and leadership, and audiences learning about climate change from a generation who, with their children, will live in the 'climate change' future that is coming.

³⁹ Kaumatua & Kuia, Teachers, Scientists, Parents, Farmers, NIWA, DOC, Environment Southland, Technologists, Fonterra etc

10 Organisational design

10.1 Governance

The Museum's governance has been the subject of an ICC-commissioned review by Denis Mowbray of Gryphon Associates. This acknowledges that defining the right model for governance is complex. In particular the complexity is based on there being three Councils, a range of different funding arrangements and the potential development and operation of three interrelated facilities.

Southland Museum and Art Gallery Trust Board

There has, at key junctures during the preparation of this report, been near unanimous agreement, including by the Chair and members, that the current model is not ideal. This has been reinforced by funders and community leaders during the preparation of this report. This is because:

- The governance model has neither the accountabilities nor mandate essential for effective governance
- Its members are principally representatives of Councils and Iwi, rather than skills-based which means collectively there is not the required skills to serve as an effective governance body
- Some members are there more as watchkeepers on behalf of the bodies they represent rather than strategic leaders or advocates for SMAG. And even though representatives of the 3 Councils are on the Board, some of the Councils feel uninformed on the Board's activities
- The Board owns the building and collections (as well as agreeing to store some private collections at no cost) but under a management contract the ICC appoints and oversees the staff and operations

Best practice models

There is no single 'right way' to provide museum and art gallery services in a community. In the event that a Council is the primary funder of such an institution (as is the case with SMAG) the Council typically defines the best way to ensure the effective operation of the facility based on a consideration of legacy issues and the future focus of the institution as it responds to its community's needs. In New Zealand different Councils take different approaches, sometimes based on "what's always happened" but increasingly based on the most effective way of ensuring high and sustainable levels of service delivery and a genuine sense of community ownership and engagement. Models include:

- Operating as Council divisions, without external governance but with advisory groups, foundations etc. This is a very common model - eg Te Whare Taonga o Waikato (Hamilton), The Dowse Art Museum and Petone Settlers Museum (Hutt City), Puke Ariki (New Plymouth), Sarjeant Art Gallery (Whanganui) and Pataka (Porirua)
- Operating a Council Controlled Organisations with Boards made up of nominees of the Council(s), relevant community partners - eg Te Manawa, Palmerston North)
- Operating under an arm's length Council bulk-funded Trust, which serves as the Governance and overarching management of a suite of organisations - eg Wellington Museums Trust
- As Council-funded charitable trusts - eg Suter Art Gallery (Nelson), Tairāwhiti Museum and Aratoi (Masterton)
- In smaller centres largely volunteer-run museums often run as Incorporated societies

Again, Ken Gorbey's salutary advice about embracing change is pertinent. The more so because since he completed his Business Case in 2015 there have been significant philosophical and structural changes that directly impact on this question, including:

- The 2018 approval to establish an ICC-operated ACI, relocating the principle art function
- The increasing importance of working in *partnership* with mana whenua
- A proposal to establish a regional Collection store and museum service
- A redeveloped Southland Museum which is likely to be a very different (people-centred learning and leisure visitor experience) business model
- The rapid and changing importance of digital media

Assessing the right model for a successful, forward-focused Southland Museum

A governance review has been undertaken to:

1. Differentiate between (to ensure best practice in each):
 - Collection ownership/custodianship on behalf of the community
 - Running a successful learning & leisure visitor-experience
2. Assess options that will most effectively:
 - Ensure transparency of accountability, and certainty of mandate, reporting lines etc
 - Delegate a high level of 'authority to lead' to the Project Director/Director - who will be the most critical person/people in terms of the venture's success
 - Avoids unnecessary duplication or ambiguity
 - Will deliver more-than-the-sum-of-the-parts outcomes
 - Ensure professionalism – the right skills around the table, with the right authority to make decisions, on the right topics, at the right time
 - Efficacy & ease of operation
 - Protect community and stakeholder trust
 - Avoid perceptions of interference by funders

Irrespective of the outcome of the review, noting that for the next 5-year period the museum will be a major capital project, the establishment of suitably skilled Project Board or Control Group is recommended. The Governing entity needs to work with this group to prioritise the work/cost plan carefully (with an uncompromising focus on delivering a major project on time and on or under budget) and ensure partnership with mana whenua is appropriately reflected.

10.2 'Project team' personnel schedule

The reinvention of the museum will involve a project development stage. This is likely to call on external consultants and expertise working with a Project Board, SM CEO and staff. This external expertise will not be required as ongoing permanent staffing, but permanent staff may well not have the experience or expertise to fill these roles to the level required for success. Experience development and Redevelopment design and build are the two key areas where this will be imperative. In the table on the following page the roles marked with an (*) are the most likely to be external consultants/contractors.

roles	Experience development	Experience construction	Museological development	Collection relocation	Redevelopment design & build	Programme development	Operations/ delivery
Project Director* Museum manager ⁴⁰	✓	✓			✓	✓	✓
	✓		✓	✓	✓	✓	✓
Commercial* Shop & cafe	✓				✓	✓	✓
Iwi/Te Ao Māori*	✓		✓	✓	✓	✓	✓
Education			✓			✓	✓
Concept leader*	✓				✓		
Collection relocation manager				✓			
Curators/ subject experts	✓		✓	✓	✓	✓	✓
Technical	✓	✓				✓	✓
Registrar ⁴¹ Collections assistants		✓	✓	✓	✓		✓
Regional projects lead	✓						
Experience design contractors*		✓			✓		
Architect*	✓				✓		
Builder*					✓		

The project team will be made up of permanent staff and consultants/contractors (*roles that may be contracted)

Note: contract expertise costs: Over and above current OPEX funding there should be a CAPEX allocation for:

- Project leadership and experience design and development: \$500k x 5 years = \$2.5m
- Collections cataloguing, imaging, packing, relocation: \$100k for 5 years = \$500,000⁴²

⁴⁰ These roles are typically separate in a project of this type and scale

⁴¹ On-staff until relocation, then in relation to the RSC outcome

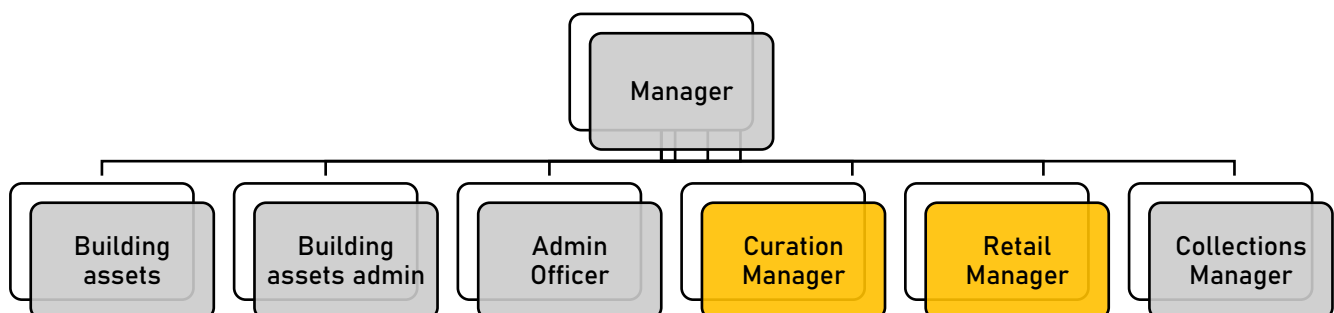
⁴² The Museum manager has identified \$200k is available in operating budget, in addition to 3 dedicated collections staff members. Together with the additional \$120k this would ensure funding for existing staff, a collection relocation project leader and contract collections assistants. Volunteers should be sought and trained wherever possible.

10.3 Leadership and staffing

In *Creating the visitor-centred museum* Lori Fogarty, Director of the Oakland Museum of California (OMCA), remembers her ‘light bulb moment’ in terms of what defined a visitor-centric museum – when she moved from a major urban art museum to a children’s discovery museum:

“It was a huge change in culture, vision and mission. And what I think I really learned there was to work in an institution that was **truly all about the audience**. It doesn’t have a collection. So really grounding myself in **thinking about audience in a much deeper way**. And also, children’s museums are interdisciplinary, **so it freed me to think about different aspects of interdisciplinary or multidisciplinary programming.**”

Her insights led her to adopt a visitor-centric organisational structure and culture on moving to the (collection-based) OMCA. The OMCA model underlines the importance of aligning the staffing and operational model to a clear sense of purpose – and people being at the centre of that. At SMAG the pre-closure Tier 1 & 2 structure (below) has been focused internally and operationally – on collections, exhibitions and the building. There was no dedicated or consolidated focus on the audience, the community, partners, stakeholders, marketing etc (which isn’t to suggest individual staff members didn’t have such a focus).



SMAG Tier 1 and Tier 2 structure as at April 2018

As noted earlier, to be successful into the future the new operating model needs to be internally-collaborative and externally-networked. In Peter Senge’s influential writing on systems thinking, a culture of a collective Leadership Team model is favoured, in place of a function-based Management Team. Senge defines effective future-focused organisations as being ‘learning organisations’, where *collaborative conversations across the whole organisation is the work*, rather than a management team model focused on *each manager reporting back about the work* their team has done and is doing. This model will have significant advantage in terms of sustainable success.

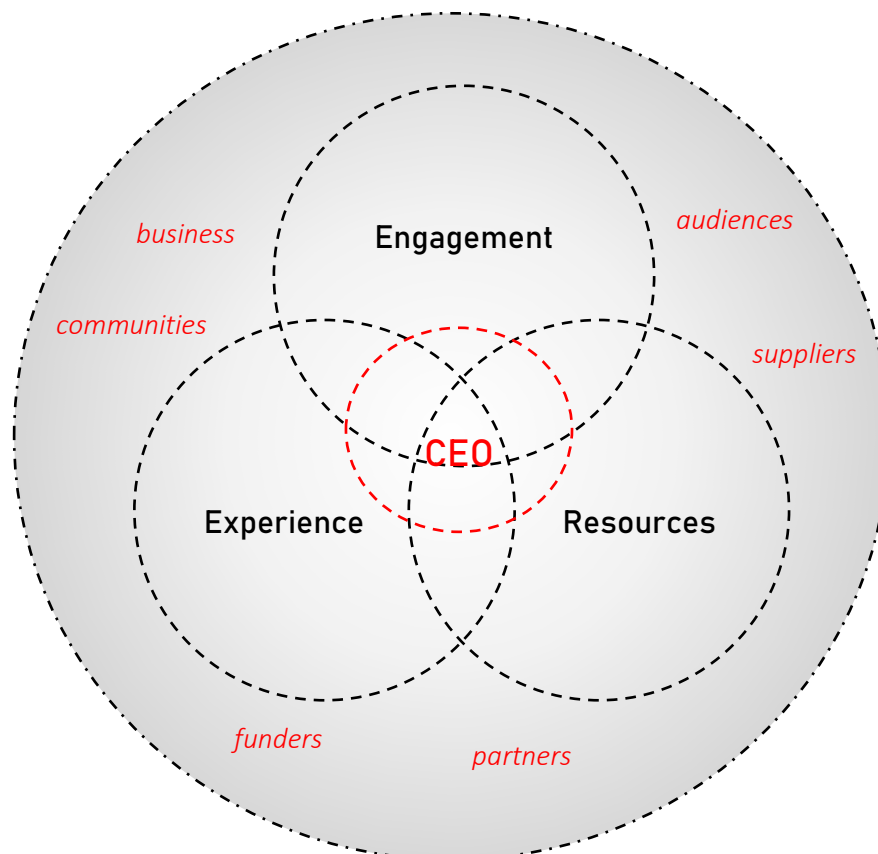
“The team that figures out how to harness **the collective genius of its people** is going to blow the competition away” WALTER WRISTON⁴³

⁴³ former Chairman of Citicorp

The recommended approach

In line with ensuring an ecosystem approach and a strategically-focused 'people-centred learning and leisure visitor experience' model a 'flatter' team structure is proposed, with staff arranged within three teams – Engagement, Experience and Resources. This three-team structure, which reflects the critical strategic lenses required for success, would be the platform for a high-level of project-by-project cross-team working groups and conversations.

Engagement team	Experience team	Resources team
partnerships, events, education, comms, revenue, Front of house hosts,	Concept development, subject experts, interpretation, co-design facilitation	Finance, facilities, technology, admin, project management design and delivery, technicians, live collections
Te Ao Māori		
'digital'		

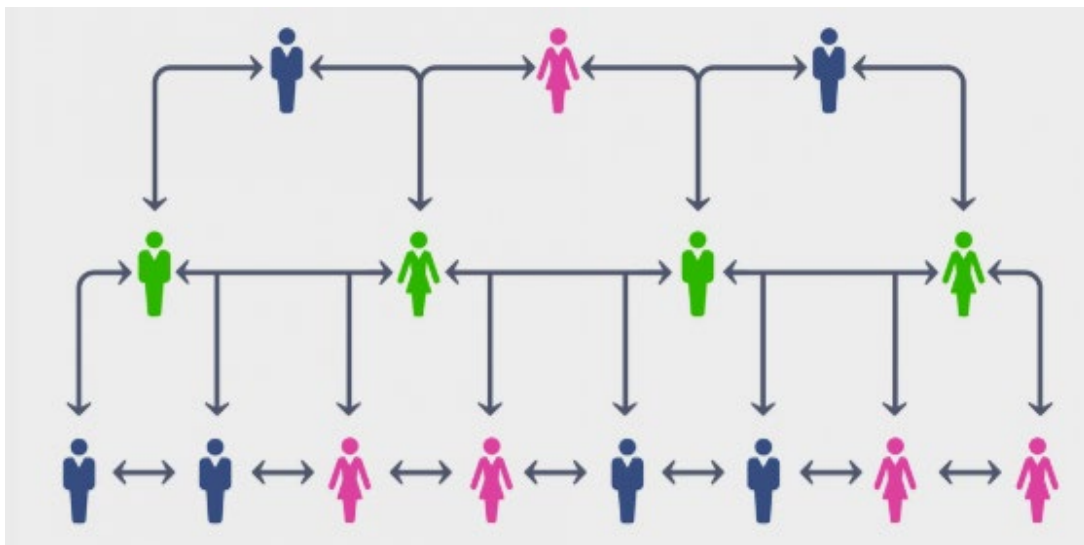


The recommended team model

Within this there should be clarity of roles and responsibilities with specific and critical skills and experience in relation to both Te Ao Māori and digital delivery. These are intrinsic to the culture required for success and not limited to one or two staff members in each case. In partnership with Iwi there should be a focus on Te Ao Māori at all level of the organisation - and a commitment to training and development. This may be reinforced through specific roles for Māori or a commitment might be made to ensuring Māori are recruited in key roles that are not defined as being 'Māori' roles. The same is true of 'digital thinking' and team culture development. As in all roles the right mix of skills, attitude and experience will be essential, and of these, attitude is often the critical element. The change process needs to include a comprehensive and mindful approach to HR expertise across all stages of organisational design and development.

Applying a 'flatter' team approach

In any organisation there is a risk that the way in which staff are arranged by line-management/functional groups prevents or significantly undermines collaborative working relationships across groups on a topic-by-topic or project-by-project basis. In museums this often results in staff in critical areas such as education or events and public programmes being incorporated into a 'delivery' team – limiting these staff (who are constantly interfacing with the public) from having any significant input into the development of the concepts and programmes that they will then have to deliver.



“Unlike the traditional hierarchy which typically sees one-way communication and everyone at the top with all the information and power; a ‘flatter’ structure seeks to **open up the lines of communication and collaboration** while removing layers within the organization. As you can see there are fewer layers and that arrows point both ways...”

JACOB MORGAN, FORBES⁴⁴

⁴⁴www.forbes.com/sites/jacobmorgan/2015/07/08/the-5-types-of-organizational-structures-part-2-flatter-organizations/#72c7f4d36dac NOTE: the diagram is credited to Jacob Morgan www.thefutureorganization.com

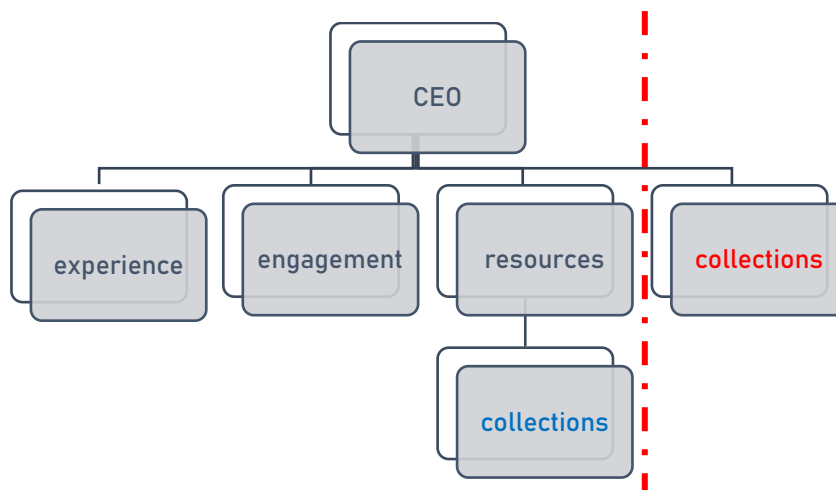
To avoid this, and to maximise the constant flow of information and feedback from the public for whom SM exists, a flatter organisational structure is recommended. This should be focused on ensuring a cross-team (and at times a whole-team) culture defines the way the organisation works.

Note: In the interests of functional and cost efficiency consideration has been given to ensuring maximum alignment across staffing of SM, ACI and the RCS. This is outlined in Vol. 2 p20.

Collections storage and management

The recommended SM staffing model is well-suited to incorporating collections management and care within a single integrated staffing model, be that:

- Under a single CEO, **within a single organisation** (where Collections staff can be seen as part of the SM Resources team), OR
- By way of a MOU or management contract with a **separate Collections entity**



‘locating’ collections within a people-centred learning and leisure visitor experience model

It is noted that this approach – locating collections in relation to a **primary people-centred model** - will frame the long-term development, access and use of collections within a people-focused framework. This is recommended as a strategic approach and will bring a critical focus on the RCS thinking to date. Collections’ relevance and meaningfulness should implicitly be defined in relationship to people. In a recent conversation about this project, and ‘the future of museums’ in general, Ken Gorbey noted:

“I suspect the world has enough museums and **we should be putting our efforts for the future into consolidating, reducing the conservative load that is collections, and creating new ways of achieving mission** by utilising existing and widely accepted thresholds...”

This may be a controversial point-of-view among people centred on collections and their care. But as the sector moves ahead it is important that the strategic lenses with which collection development, retention, care and access are assessed, are interrogated in relation to purpose.

	Engagement	Experience	Resources	Collections
Experience development	education, events, hosts, comms, revenue, partnerships	LEAD concept development, design + delivery, co-design facilitation	finance, project management, technology, facilities	Collections and information
Partnerships	LEAD education, events, hosts, comms, revenue, partnerships	concept development, co-design facilitation	project management, technology, facilities	Regional museums, Private collections
Digital	education, events, hosts, comms, revenue, partnerships	LEAD? concept development, design + delivery, co-design facilitation	finance, project management, technology, facilities	Collection digitisation and access interface
Revenue	LEAD comms, revenue, partnerships	concept development	project management, technology, facilities	Copyrighting, image sales. Private collection services
Collections	Collections online	collection content, visible storage, collection development	Collection storage facility and maintenance, climate controls	LEAD Collection management, digitisation, access

	Engagement	Experience	Resources	Collections
Te Ao Māori	✓	✓	✓	✓
Technology	✓	✓	✓	✓
Project Management	✓	✓	✓	✓

A commitment to joined-up thinking and activity should be prioritised as part of the strategic planning and annual planning, be that one or two organisations

A regional 'Museums of Southland' alliance

Across Southland museums are facing a set of challenges that are familiar nationwide. These include:

- Many volunteer staff who are ageing, forcing some small museums to simply close down with no plan for what happens to the collections, knowledge or memories. This trend is likely to increase in coming decades
- A lack of OPEX funding to sustain the existing museums – both in terms of long-running museums and more recent facilities which had significant CAPEX support with little ongoing allocation of OPEX funding
- Uninsured collections stored in buildings that are not fit-for-purpose

Within the sector there is a call for a regional approach that better supports museums in their locations. The opportunity to have differentiated but highly aligned centres-of-energy and excellence in the ACI (and with it the Library & Archives), a redeveloped Southland Museum and a regional collection facility offers significant opportunities for Invercargill and Southland. As noted above, a strategic focus should be focused on ensuring the whole is greater than the sum of the parts, avoiding the common tendency for organisations to operate in isolation from each other.

SMAG's regional service

While it is charged with delivering a regional service and being a Southland-wide museum there are many who feel that SMAG has often failed to meet either expectation fully. The decision by the Board to enter into a management contract with ICC is often identified as a cause of this, partly due to the lack of a director with museum-sector skills being hired to lead.

Notwithstanding the readiness of staff to assist other museums and to make display furniture available on a case-by-case basis, there is no Regional Museums Strategy or Plan in place within SMAG's operational model. Indeed, in lieu of this, in recent years it has been the SRHC that has taken a leadership position in terms of creating a regional museums support staff member and service. The historical failure of SMAG to deliver a regional service reflects its resourcing level, its internal operational model - which results in a small staff being alternately deployed on changing (mainly art) temporary exhibitions and undertaking other business, leaving little time to devote to regional support - and a lack of prioritising regional services as core business.

Addressing these three factors – resources, prioritising and planning - might improve the frequency and quality of regional services. But it is clear, and brought into focus by the work of the SRHC in recent years, that there are a series of (current and impending) systemic issues relating to Southland's regional museums sector.

A recommended approach is outlined in Vol. 2 p 7.

11 Operational exemplars (by population, funding etc)

The table on the next page provides a comparative of regional New Zealand institutions serving larger and smaller regional populations in the South and North Islands.

Analysis of the data

Based on the data on the previous page SMAG stands out in a number of respects when compared to the other regional institutions:

- The percentage of OPEX that comes from the ICC and SHRC grants combined is low at 68% (average is 85.7%)
- Visitation, based on OPEX and population is very high. The former manager is firm this is based on sound methodology, but in the absence of a formal single counting mechanism caution is advised.
- As a result, Council/SHRC subsidies compared to the five regional comparators is low per visitor \$22.59 (SMAG was significantly lower at \$7.58) and at themed point per resident \$17.84 (SMAG was \$17.75)
- Staffing levels and employment costs as a percentage of OPEX are similar to other institutions
- While SMAG has generated a higher ratio of 3rd party revenue than other institutions it's ratio of \$ per visitor is lower than average. This suggests levying a charge for non-locals will pay dividends and substantially increase the organisation's cashflow

Forecast

The proposed model looks to diversify and increase revenue, including through introducing charges for some experiences and services. This will require smart professional commercial expertise through the project stage, and once the museum is open.

Based on the reported high visitation achieved up to 2017. Again, in the absence of a formal single counting mechanism caution is advised. That said, this is a good level of visitation to achieve, when seen in light of the very successful Toi Tu in Dunedin.

Success will still rely on high levels of use by locals, as well as a steadily growing, sustained visitation by domestic and international tourists.

	South Canterbury	MTG Hawkes Bay	Waikato Museum	Toi Tu Dunedin	Te Manawa Palm North	SMAG 2017-18	SM 2023-24
Annual OPEX	785,500	4,100,000	5,405,365	6,594,000	3,930,000	2,392,935	2,988,000
Council(s) grant ⁴⁵	704,000	3,703,000	5,405,365	5,995,000	3,063,626	1,745,000 ⁴⁶	2,208,7000
Employment costs	395,500	1,360,169	2,288,000	2,284,900	2,294,262	1,200,000	1,494,000
As % of OPEX	50.3%	33%	44%	38%	58%	40%	50%
No of FTEs	6.5	27 (+ casuals)	32	32	30	23	28
Council(s) grant as % OPEX	89%	90%	100% ⁴⁷	90%	77%	68%	73%
3 rd party revenue target	81,200	397,313	226,000	599,000	554,671	687,450	1,000,000
3 rd party revenue as % OPEX	11%	9.6%	4%	10%	14%	32%	31%
3 rd party revenue per visitor	\$3.53	\$1.91	\$1.60	\$1.89	\$3.92	\$2.98	\$3.63
Public space (m2)	680		3,100	4,942	6,000	4,000	4,200
Annual visits to facility	23,000 ⁴⁸	207,854	138,873	316,000	141,436 ⁴⁹	230,160	275,000
Regional population	59,200 ⁵⁰	164,000	460,100	224,200	240,300	98,300	108,000 ⁵¹
Visitation as % of population	38%	126%	30%	140%	58%	235%	254%
Council subsidy per visitor / resident	\$30.60/\$11.90	\$17.88/\$22.57	\$38.92/\$11.74	\$18.97/\$26.76	\$21.72/\$16.37	\$7.58/\$17.75	\$7.37/\$20.44
Total REV	785,500	4,100,000	5,405,365	6,594,000	3,722,913	2,432,000	3,208,000
Total OPEX	785,500	4,100,000	5,405,365	6,594,000	3,930,304	2,393,000	2,998,000

A comparative table – NZ regional museums

⁴⁵ In most cases these are a mix of City Council and district council grants

⁴⁶ Includes \$1.1 million from the SRHC and \$635k from ICC

⁴⁷ Note the 'self-imposed 3rd party revenue target' which allows the museum to spend additional revenue in addition to baseline OPEX

⁴⁸ Onsite visitors and onsite/offsite education classes

⁴⁹ Te Manawa report 51,156 e-visits in addition to visitors to the facility (a current review of governance is likely to recommend discounting these as countable visits)

⁵¹ Based on 11% growth census to census

12 Strategic assets

The museums key strategic assets, in addition to governance, leadership and staffing, will be its collections, brand, facilities, location, systems and processes and its operational model.

12.1 Ngā Taonga / Collections

Taonga and collections are both tangible (physical artefacts and items) and intangible (memories, stories). While the collections will be held within the complementary RCS facility, where they may be owned by a Trust Board and managed by non-Southland Museum staff, they will – in their physical manifest form and in their spiritual, cultural and historical associations and stories - remain a critical asset at the heart of the museum’s mission and purpose.

12.2 The Brand

The brand of the new organisation must be developed and managed as a strategic asset. As indicated by the brands for Auckland’s largest children’s hospital and national museum (below), professionally developed, a brand is not just a descriptor of a building’s function (eg museum or library or factory) or just a name. And it is certainly not a just a ‘logo’. In both of these examples the brands are ‘stories’ of ‘experiences’ that are held in high regard – whether that be for a young child and her/his family when dealing with a difficult health situation or international and domestic tourists who routinely pre-book and visit Te Papa as part of a visit to New Zealand and Wellington.



In each case, branding and naming these organisations as ‘Auckland Children’s Hospital’ and ‘NZ National Museum’ – whatever the graphic design treatment of a ‘logo’ – is likely to have resulted in considerably lower ‘value’, for the organisation and in the minds of the recipients of their services. This is because people have set ideas about what a ‘hospital’ and ‘national museum’ experience are, and an apprehension of these typically outweighs an open enthusiasm to engage with the experience. Similarly, to leverage success across the multiple bottom-lines outlined in this report, a professional approach should be taken to developing the brand for the reinvented museum.

12.3 The Facility

There is an argument to be made for the building being a heritage item or ‘collection item’ in its own right. This needs to be considered carefully to understand its intrinsic value as a strategic asset – in terms of its story its potential in relationship to future brand and experience value. The current museum facility is the result of construction of the pyramid in 1990 over the two original buildings by the then Director Russell Beck. While the construction of the pyramid created a number of problems of its own over subsequent years, it was an artful and cost-effective solution at the time. It enclosed the buildings and created additional space for other functions, including added storage space, an art gallery and a Tuatarium. These have remained features of the SMAG experience until it was closed in 2018. As well, its expansive roof surfaces were used on at least two occasions for multimedia projection shows, attended up upwards of 20,000 people. Beck was, in a number of respects, a visionary director and a national sector leader – and the pyramid (the first of a cluster he foresaw for the site, including one for a children’s museum) is testament to this.



The pyramid during construction, and the ‘tāniko’ border Beck envisaged to complete the ‘korowai’ of the roof.

The pyramid was also seen, by Beck, as having references to Te Ao Māori, in a number of ways:

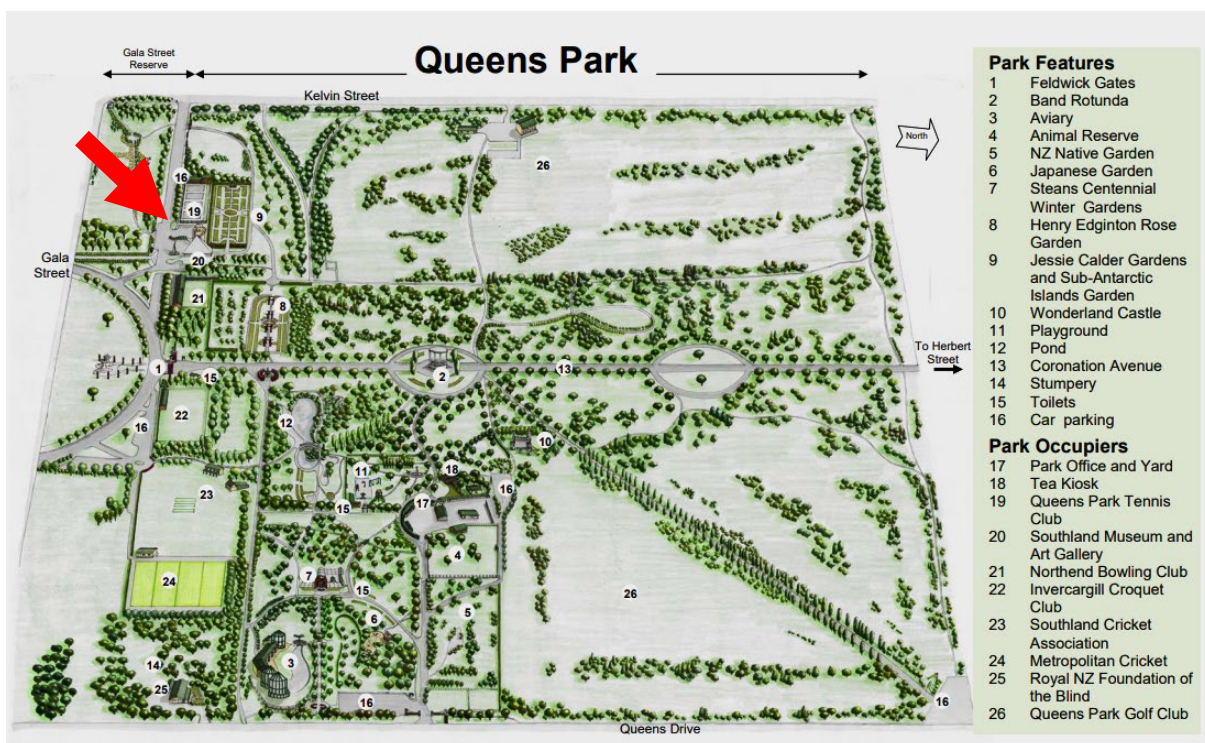
- The structure echoes a form of Whare found only in Southland
- The museum’s name *Southland Museum and Art Gallery Te Niho o te Taniwha* refers to a tooth of the Taniwha that created Te Ara o Kiwa/Foveaux Strait
- Beck referred to the roof as a korowai (cloak) and proposed a decorative ‘tāniko’ border to run around its base.

Over the years since it was completed the pyramid structure has been overtaken by a number of issues, not the least of which were the low earthquake ratings of all three component structures which resulted in the decision to close the museum. As well, incumbent museum manager Paul Horner was planning an additional 2,000m² storage facility adjacent to the pyramid, to allow for the growing collections held by the museum. In 2015, as noted in Ken Gorbey’s report, the Board were progressing on the basis of retaining and adding to the pyramid. A table assessing various ‘long list’ options for staying on this path or demolishing in favour of building a new structure can be found in Vol. 2 p 42.

12.4 The location

Equally, the Queens Park location – on the southwest corner most closely related to the CBD, should be assessed as a strategic asset.

From its construction on the site in 1942, the museum has been seen as a critical element of community amenity within the boundaries of Invercargill’s magnificent Queens Park. Indeed, its location at the city edge of the park, near the park’s grand entry gates, and at the end of Deveron Street the museum appears to have been seen as a key link between the city centre and the park. This remains a compelling opportunity today, as a future museum is considered.

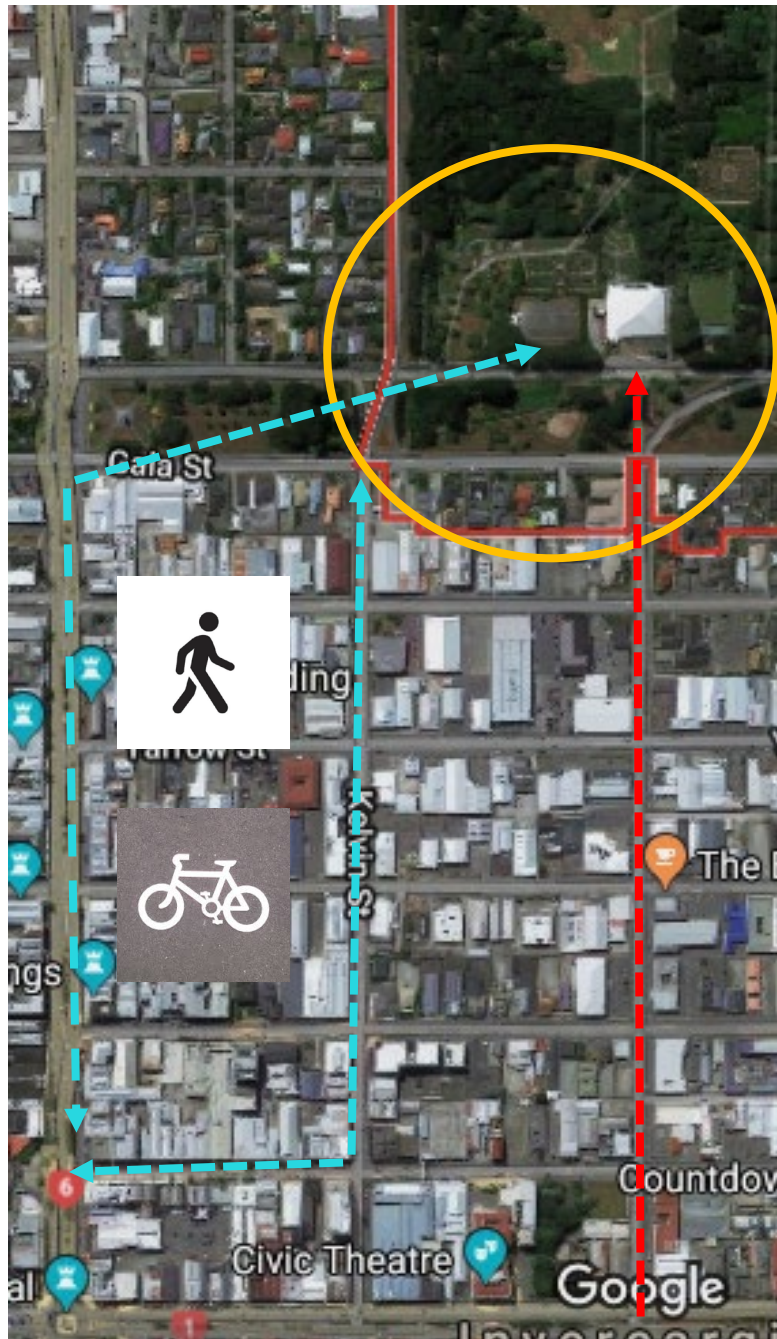


The pyramid in Queens Park

In 2018 the building does little to optimise the considerable opportunities provided by its site. The link to Deveron Street and the city is obscured by a nondescript hedge and its relationship to Queens Park, on the northern face, is unwelcoming, inaccessible and a little untidy. The potential to light the pyramid has not be pursued in many years and there is little connection out into the park from inside the building, or vice versa. Looking ahead, the site offers considerable advantages and these will be critical to the redevelopment developed. These should include a consideration of:

- Access into the park from the museum and vice versa
- Activities for children within enclosed areas (for safety and supervision) and for older children, youth and families in unenclosed areas of the park, adjacent to the museum
- Access to food and beverage services and places to have lunch or a picnic
- Future development options for the Tuatarium and kakaporium (if that project develops)
- Interpretation and interactives in relationship to the flora in the park
- Treasure hunts, rallies, geocaching activities etc
- Physical challenge and fitness equipment

Community groups, including Sport Southland, are supportive of activating the relationship with Queens Park. Ideas including developing the tennis court as a children's bicycle learning area, allowing trips out into the safety of Queens Park.



Google maps transit routes (by vehicle, cycle or on foot) between the CBD and Queens Park indicate that the SW corner of the Park is a strategically important point of connection and arrival. The redevelopment should enhance this. The current site-line of the museum down Deveron Street should be retained and enhanced.

13 Functional and spatial brief

The description of the function, roles, attitude of a ‘future-museum’ on page 17 align with and inform an assessment of the operational and spatial requirements. In turn these are informed by and align closely to the findings of the *Our Tale NZ* research. The redevelopment design brief should ensure it:

- Is a ‘must see, must do, must revisit’ visitor offer
- Incorporates the functionality, spaces and adjacencies as defined in the space budget, including:
 - a high attraction children-focused Discovery Centre – with inside and outside spaces
 - a destination café⁵²
 - multi-functional and flexible spaces
 - rich opportunities to engage with collections
 - arrange of spaces (scale and type) to allow functions, events, sustainable programme refreshment and change
- Provides social spaces facing the sun, and indoor/outdoor flow
- Significantly increases the amount of social, activity-based and family-friendly amenity and space
- Activates the relationship with Queens Park – with spaces outside used as dedicated programme spaces
- Dramatises the entrance in relationship with city and dramatise the sense of arrival (to the building, at reception and into the museum proper)
- Ensures functional back-of-house spaces and equipment
- Includes a specialist fit-out including climate control, digital infrastructure, security etc

Success will also rely on:

- A number of signature high-energy destination visitor experiences (eg: exhibition, event, tuatara etc)
- Revenue generating facilities and features, including a commercially successful food services operation – based around a destination café/restaurant and related catering, functions & community/business meetings⁵³
- Activating the brand, experiential and placemaking value of the pyramid (if retained) or a new building if built
- Activating and dramatising the sense of ‘being inside a pyramid’ (if retained) – with journeys (up and down ramps, stairs, slides) and spaces (large halls, nook and crannies) that expand the sense of how big it is, how long it takes to see, what there is to explore. This might include dark rooms – to see galaxies and stars
- A multi-purpose theatre/auditorium suitable for small to mid-sized conference with break out spaces, video conferencing, meeting facilities

A space budget is provided in Vol. 2 p 26.

⁵² The highest requirement (by far) by people in *Our Tale NZ* report

⁵³ Meeting facilities were seen as essential to aid collaboration within the heritage sector as well as for general community purposes in *Our Tale NZ* report

The viability of a destination café

Any perception that Invercargill has reached peak-café and that this should be a reason not to specify a café within the SM (or ACI) should be tempered with a consideration that:

- As a successful must-see, must-do visitor experience, visitors will expect a destination café
- A destination café will increase visitation and duration of visit, which will translate into higher spend-per-visitor on things other than café fare
- The Queens Park site and the opportunity to open up light and space to the north will provide the basis for an operator to create a highly successful business (even if that results in an operator relocating and existing operation to this new site)
- A café operation in the SM will provide leverage for functions, business meetings, take-out coffees, picnic lunches and ice creams in the park etc
- The redevelopment can be configured to allow after-hours access to the café – allowing breakfast and evening service if viable

There will be an opportunity cost – for the museum, for the city and for a businessperson, if the redevelopment does not integrate a win-win-win café operation into its thinking. This need to properly allow for ease of access (by car and foot/cycle), ability to open afterhours and operate as a caterer for museum and external events, licencing and relationship to and access into/from Queens Park. It would be a lose-lose outcome if a café is not developed as a strategic asset within the redevelopment.

The I-site

An allocation has been made for an I-site at the museum. There has been discussion about the relative merits of it being at the Museum or at the ACI in the city centre. An I-site at the SM is recommended, but there is also value in considering a satellite in the city centre – see Vol. 2 p 16.

14 Assessment of redevelopment options

A range of costed approaches to the development are outlined in Vol. 2 p 42. These look at 4 principal options, with variations within some:

1. Do nothing
2. Upgrade the 'pyramid' (including seismic) with or without a small glazed extension on the north face (as per July 2018 scheme – page 84, and Vol. 2 p 21) – complemented by a solution to the storage of the collection
3. Demolish Pyramid building and replace with a new 2 level building providing the same area as the existing Pyramid building
4. Demolish Pyramid building and relocate the Museum to an existing refurbished commercial building near the city centre (outside of the scope of this review but included as a comparator)

Of the nine approaches assessed, the following five options were shortlisted:

Retain and upgrade (including seismic) pyramid building with proposed upper level extensions ⁵⁴ PLUS				
Option SM1	<ul style="list-style-type: none"> Permanent Regional Collection Store, Stage One 	4,812	\$35.3m plus \$4.4m for stage one regional collection store (\$39.7m)	<ul style="list-style-type: none"> Plus c. \$52,500 OPEX for move of collection Includes permanent collection store
Option SM2	<ul style="list-style-type: none"> Temporary ICC Collection Storage within city. 	4,812	\$35.3m plus at least \$1.9m to temporarily house collection (\$37.2m+)	<ul style="list-style-type: none"> Plus c. \$52,500 OPEX for move of collection Plus, ICC lease costs (tbc) Excludes cost of a long-term collection storage solution
Option SM3	<ul style="list-style-type: none"> Temporary relocation of collection to commercial storage facility 	4,812	\$35.3m plus \$2m (storage for 3 years) (\$37.3m+)	<ul style="list-style-type: none"> Plus \$225,000 OPEX for move of collection Allows a fast commencement of SM redevelopment Cheaper than leasing and fitting out temporary store Excludes cost of a long-term collection storage solution Defers Regional Collection Facility progress and limits critical ongoing work on collection

⁵⁴ See page 84 and Vol. 2 p 21

Demolish pyramid building PLUS				
Option SM4	<ul style="list-style-type: none"> relocate the Museum to an existing refurbished commercial building near the city centre Including Regional Collection Store, Stage One. 	4,600 + 1,400 for collections ⁵⁵	\$44.7m (\$44.7m)	<ul style="list-style-type: none"> Includes estimated purchase price (and costs of making good the site as part of Queens Park). <u>Includes cost of storing the collection</u> No income can be made from demolishing/vacating the existing building/land Plus \$52,500 OPEX for move of collection
Option SM5	<ul style="list-style-type: none"> Replace with a new 2 level building of same floor area Regional Collection Store, Stage One. 	4,812	\$56.1m plus \$4.4m for stage one storage (\$60.5m)	<ul style="list-style-type: none"> <u>Includes permanent collection store</u> A new building would remove the intrinsic value of the pyramid (which would need to be demolished or repurposed) as a distinctively Southland visitor experiences, for a greater cost than retaining and enhancing it Plus \$52,500 OPEX for move of collection

Collection storage and relocation

As noted, while the focus is on redeveloping the SM, there are direct project interrelationships between the museum and the question of collection storage. While the work looking at Regional Storage needs has only recently begun, it is necessary to factor in the costs of the (temporary or permanent) relocation of the SMAG collection as part of any option for the redevelopment.

Notwithstanding the issue of the museum staff not having a clear idea of what the collection holds or how physically big it is (by volume or weight), a preliminary assessment of options has been undertaken as part of this report, to provide a reasonable, indicative outline of the range of CAPEX and OPEX costs involved in managing its transition as part of the SM redevelopment.

A summary of these costs and analysis is provided on the following page. A fuller breakdown is provided in Vol. 2 43.

⁵⁵ The Farmers building, for example, is large enough in allow for storage (SMAG collection only)

Collection storage options in relationship to the redevelopment of the museum (1,600m² for SMAG collections only)

The table below outlines the options for factoring in the costs of storing the SMAG collections as part of the capital redevelopment of the museum. This includes a mix of temporary and permanent solutions. The redevelopment of the museum cannot progress until a solution to collection storage is agreed. That said, until the Regional Collection Store feasibility study is completed it is difficult to assess the best long-term approach.

Option C1: purchase and refit a 1,600m² stage 1 RCS facility		
Purchase	2,000,000.00	Includes cost of storing SMAG collection but excludes the full cost of a site/facility large enough to house a Regional Collection Storage facility of a yet-to-be-determined size
Refit, FFE and fees	2,250,000.00	
Freight costs (2-way)	105,000.00	
TOTAL	4,355,000.00	
Option C2: lease and refit a 1,600m² facility		
Lease (3 years)	300,000.00	Excludes the cost of a long-term storage facility for SMAG or any other collections
Refit, FFE and fees	2,250,000.00	
Freight costs (2-way)	105,000.00	
TOTAL	2,655,000.00	
Option C3: build a new stage 1 RCS building of 1,600 m² adjacent to SMAG		
Construction costs	4,083,000.00	It would make no sense to only build a one level store noting the longer-term needs of the region. Multi-story structures on this site become increasing less cost-effective solutions and such a facility is a poor use of important public amenity space
Fit-out, FFE and fees	2,250,000.00	
Freight costs (2-way)	20,500.00	
TOTAL	6,353,500.00	
Option C4: relocate collection off site for 3 years (ICC)		
Lease tbc	---	Excludes any lease or rental fee and cost of long-term facility and full fit-out and FFE
Fit-out & FFE	1,770,000.00	
Freight costs (2-way)	105,000.00	
TOTAL	1,875,000.00+	
Option C5: relocate collection off site for 3 years (Iron Mountain)		
Rental	1,772,000.00	Excludes cost of long-term space, fit-out and FFE
Freight costs (2-way)	225,000.00	
TOTAL	1,997,000.00	

14.1 The recommended option

Option SM1 + C1 are recommended, made up of:

The pyramid

The 2015 report assumed the retention of the pyramid, at the Board's request. It is important to consider the legacy issues and opportunities of the building's conception, Russell Beck's vision and ingenuity, the qualities of 'Southland(er)ness' it might enshrine and express, the highly popular open laser show and how this might present opportunities moving ahead. The *Our Tale NZ*, while based on a small sample, showed a high level of support for retaining the pyramid. This increased when more was known about the history and story of the structure.

This recommendation is based on SM1:

- Being the basis of the most cost-effective comprehensive scheme (with provision for collection storage as part of the project)
- Retaining and enhancing the pyramid's unique advantages in terms of its rich mana whenua references and height (a new building is likely to be 2 stories only) and internal spaces with the potential to be distinctive and unforgettable
- Protecting the iconic brand story value of the pyramid, which while poorly expressed and leveraged at present, is seen as having critical advantage to the city and region moving ahead.
- Enhancing its relationship with Queens Park, to the west and to the north
- Retaining the pyramid's iconic presence and strategic relationship to the city centre and south Invercargill on the Deveron St axis
- Opening up the internal spaces to the north and the park, increasing the city's provision and attractiveness of social, warm indoor public spaces and the museum's ability to programme in ways that activate Queens Park - and for programming in Queens Park to further activate the museum – day and night.

Note: see Volume 2 page for further assessment of the potential and value of retaining the pyramid.

Collection storage

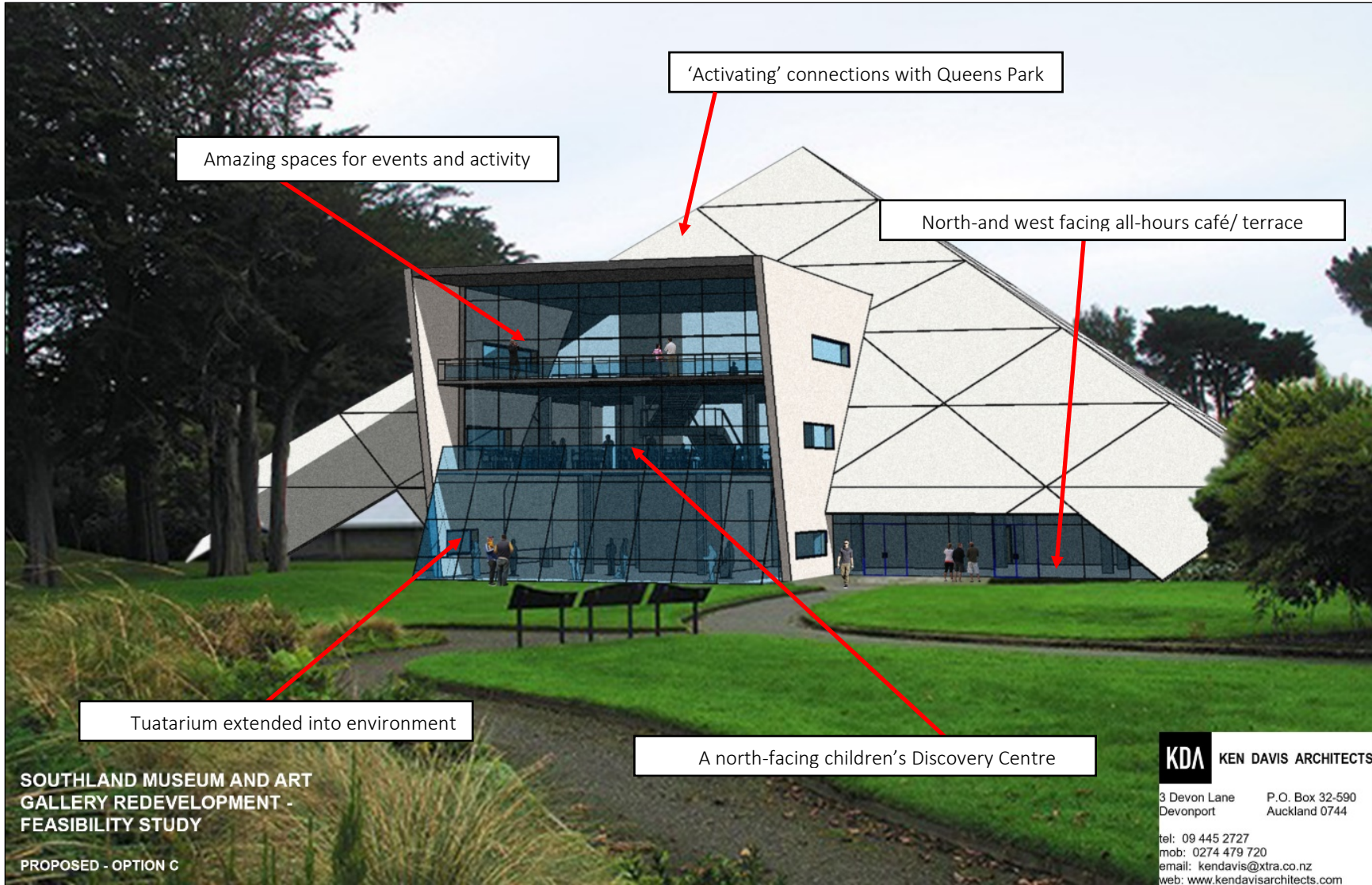
And offsite solution (build or buy/refit) is recommended, as part of a regional facility. \$5.6m has been allowed for this. (option C1)

Locating a collection store on the tennis court is not supported, because:

- It is a costly option - there is not sufficient space (within the 2009 resource consented area) to house a regional collection facility on a single level
- It would be an inappropriate use of what will become an important public realm space as a result of the redevelopment
- It would close off development opportunities for the people-centred activities of the museum



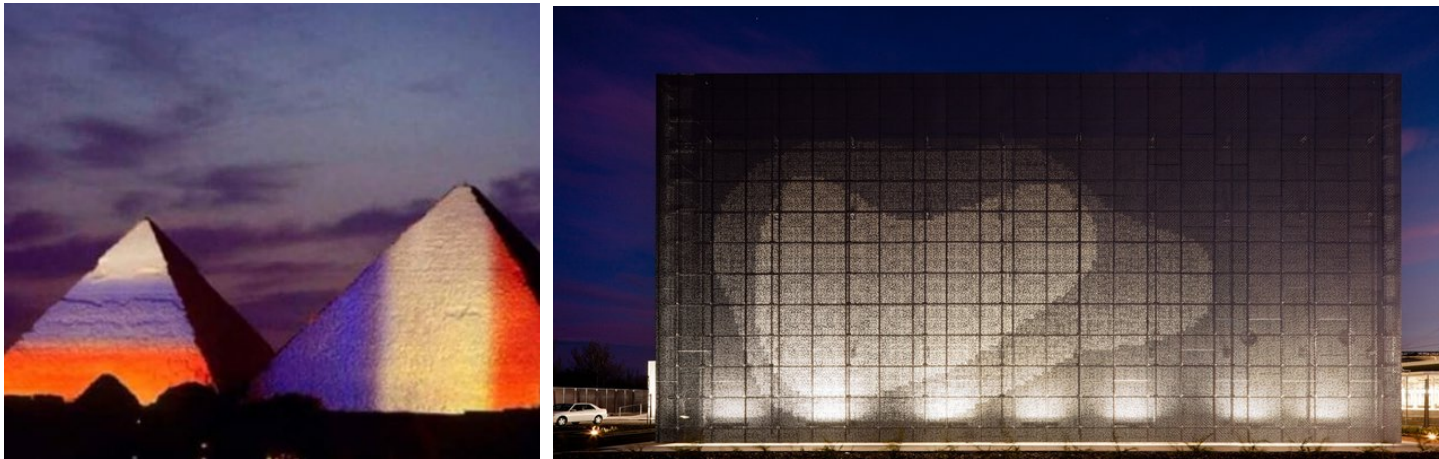
The current north-facing façade of the building isn't inviting or 'public'



An indicative view of a small multi-storey insert giving an enhanced and people-friendly glazed north face on to Queens Park



Lighting, projections on the roof and mist-generating machines have the potential to create an iconic 'must-see' evening experience and an iconic, point-of-difference brand. Replacing the roofing material will allow options for patterning and perforations (bottom right) - allowing glazed sections, a play of light internally and across external surfaces at nights etc.



15 Financial

This section outlines the CAPEX and OPEX costs of the recommended option.

15.1 CAPEX Cost Estimates

The Building Construction Cost estimates are summarised in the table below, based on a range of costs per m²⁵⁶ + GST + fees advised in November 2018 by Quantity Surveyor Glenn Brown for work to this scale and type of civic project. Based on the recommended redevelopment option, including a \$5.6m towards the provision of long-term storage solution for the SMAG collection, the provisional CAPEX costs are as follows:

		Cost (000s)
Construction (SM & collection)	As per cost plan (Vol. 2 p 42)	39,742.0
External works	600m ² @ \$700 per m ² ⁵⁷	4,200.0
Professional fees @ 15% ⁵⁸		6,591.3
Value management	Value management at Developed design	40.0
TOTAL		\$50,573.3

CAPEX escalation – Glenn Brown estimates construction cost inflation at 7% per annum as at March 2019. Assuming a 7% year on year increase the CAPEX, costs would rise to:

	Increase by 7% (000s)	Cost (000s)
2019-20		50,573.3
2020-21	3,540.1	54,113.4
2021-22	3,787.9	57,901.3
2022-23	4,053.1	61,954.4
2023-24	4,336.8	66,291.2
2024-25	4,640.4	70,931.6

This is the basis for defining the project CAPEX budget at \$66m.

Reframing the project budget

The table on page 88 outlines a series of options which will have the effect of lowering the CAPEX project budget, for the Board to consider. Applying these would result in lowering the 2019 base project budget – but in some cases this relies on true costs being transferred to other projects or budget lines.

⁵⁶ These are specified in each of the cost schedules in appendix x

⁵⁷ Glenn Brown's advice is \$300 per m² paving, \$300 per m² planting and \$100 per m² furniture, plus 15% fees

⁵⁸ There is an allowance for 15% of the project budget for Architect, Structural Engineer, Building Services Engineer (Electrical, Mechanical (ie HVAC), Plumbing and Drainage and Fire), Quantity Surveyor, Resource Consent Planner, Project Manager

		Cost (000s)
Construction (SM & collection)	As per cost plan (with exclusions Vol. 2 p 42)	33,142.3
External works	600m2 @ \$700 per m2	excluded
Professional fees @ 15% ⁵⁹		4,971.3
Value management	Value management workshop at Developed design	40.0
TOTAL		\$38,153.6

	Increase by 7% (000s)	Cost (000s)
2019-20		38,153.6
2020-21	2,670.7	40,824.3
2021-22	2,857.7	43,682.0
2022-23	3,057.7	46,739.7
2023-24	3,271.8	50,011.5
2024-25	3,500.8	53,512.3

The reframed budget CAPEX would be \$50m.

15.2 Funding plan

The project cost is set at \$66 million (in 2023-24). This is seen as a challenging but achievable target, as per the assumptions outlined below:

source	amount	notes
Councils	\$22m	ICC has indicated \$9.5m for the museum in its current LTP, and an additional \$9m for a regional collection store ⁶⁰ .
Significant national funding sources including Provincial Growth Fund, Ministry for Culture & Heritage (and Lotteries Significant Projects ⁶¹)	\$30m	The project is eligible under the MCH Regional Culture & Heritage fund ⁶² . The \$40+m Sarjeant Gallery redevelopment in Whanganui, which includes earthquake strengthening, received a total of \$28m from these sources - \$12m (PGF), \$10m (MCH), Lotteries Significant Projects (\$6m)
Other Lotteries funds and Trusts	\$10m	In addition to Lotteries Environment and Heritage and Community Facilities there are a number of Trusts from whom funding can be sought. This total is achievable given the high level of support for the museum and the breadth of its reach.
Partnerships & Fundraising	\$4m	See assumptions vol. 2 page 14 and 58
TOTAL	\$66m	

An outline of funding sources and a suggested structure for the Foundation fundraising is provided (see Vol. 2 p 14 and 58.)

⁵⁹ There is an allowance for 15% of the project budget for Architect, Structural Engineer, Building Services Engineer (Electrical, Mechanical (ie HVAC), Plumbing and Drainage and Fire), Quantity Surveyor, Resource Consent Planner, Project Manager

⁶⁰ From these allocations, on the basis of percentage of the population, ICC would provide about \$11.4m for this project

⁶¹ These funding streams will remain, based on Government policy, funder priorities etc.

⁶² The MCH Regional Culture and Heritage fund is currently set at \$6.7m annually. The Minister has some discretion to allocate over more than one financial year.

Potential opportunities to reduce project budget

Redeveloping a major facility like the Southland Museum requires a high level of capital investment. Savings could be made in the following areas:

	Potential reduction	comment	Potential project budget reduction (2019 \$ millions)
Project Board remuneration	May be seen as unnecessary if a professional board with requisite skills is appointed	This is an accounting matter for the Board and its funders to consider (remuneration for equivalent skills need to be budgeted for one way or another)	---
project consultants and contractors	Reduce budget allocation external professional services	The value of this expenditure will be in terms of overall project development and delivery, commercial modelling and fundraising/partnerships, Te Ao Māori and technical guidance	[0.5m not recommended ⁶³]
Landscaping / groundworks	Remove from project budget (ICC/Queens Park cyclical renewal cost already budgeted for)	This is an accounting matter for the Board and its funders to consider	4.2m
Collection storage	Removing the \$4.4m allocation for a permanent facility to house the SMAG collections from the budget and including the lower cost of temporary relocation of the collections	This is an accounting matter for the Board and its funders to consider	2.4m
Total			\$6.6 million

⁶³ This reduction is not recommended – it is likely to be more than offset by reduced investment and increased value generation

15.3 Operational expenditure and revenue

Operational expenditure	2016/17	Future ⁶⁴
Staffing expenditure	1,152.8	1,494.0 ⁶⁵
Operational expenditure; includes:	370.0	450.0
• Programmes (exhibition, events, workshops etc) ⁶⁶	18.4	100.0
• Retail stock	114.8	150.0
• Café supplies	126.3	0
• Public relations	19.6	35
• Energy costs	3.5	40.0
• Collection costs	33.5 ⁶⁷	20.0
Administration costs, includes:	107.2	150.0
• Marketing (+ PR/partnerships for future)	42.3	100.0
• Insurances	1.6	6.0
Grants and subsidies expenditure	15.2	16.0
Maintenance costs, includes:	27.2	42.0
• technology	0	25.0
Internal expenditure ⁶⁸	668.5	696.0
Depreciation	14.9	120.0 ⁶⁹
Sundry	20.0	20.0
TOTAL	2,355.0	2,988.0
Operational revenue		
ICC grant	634.0	2,208.7 ⁷⁰
SRHC grant	1,109.0	
Fees and charges, including:	575.4	800.0
• Donations (non-residents)	1.9	5.0
• Tickets	0	375.0 ⁷¹
• Shop sales	556.5	720.0
• Gallery and facility hire (lease in future)	1.9	35.0 ⁷²
Grants and subsidies (Non SRHC), including:	51.1 ⁷³	65.0
• Donations (locals)	3.5	6.0
Sponsorship	0	35.0
Recoveries/other revenue	10.6	25.0
Sundry	18.6	25.0
TOTAL	2,361.5	3,208.7

⁶⁴ 50% of OPEX, in line with national comparators

⁶⁵ Excludes collection staff (which are covered in the surplus)

⁶⁶ Includes inhouse and rented exhibition and Tuatarium

⁶⁷ Includes conservation and restoration

⁶⁸ Internal ICC charges, including infrastructure and finance overheads

⁶⁹ Assumes an average of 8% depreciation on \$1.5m deductible assets

⁷⁰ 75% of OPEX, in line with national comparators

⁷¹ Assumes 25,000 non-locals paying \$15 for entry and/or feature experience per annum

⁷² Assumes increased hireage and income from a lease (a professional cafe operation)

⁷³ \$38,500 for LEOTC in the current year, this hasn't been renewed for the next three-year contract

Surplus (deficit)	\$6.0	\$220.7
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OPEX notes

- In 2018-19 dollars.
- based on the facility specified and on nationwide comparators
- 2016/7 totals are correct. 'sundry' expenditure and revenue is added to cover rounding issues in calculations
- A higher surplus could be applied to:
 - offsetting the SMAG-related staffing and OPEX costs of the Regional Collection Store
 - funding critical renewal and reinvestment

Note: As the project develops there should be a high level of focus on developing a range of strategic partnerships that will result in (cash, in-kind and joint venture) CAPEX and OPEX opportunities. The operational expenditure and revenue table above does not allow for investment from and returns to partners – other than an allowance for sponsorship. It is assumed that project leadership would develop such opportunities in a manner that was advantageous to the bottom-line, or cost neutral in return for non-financial bottom-line advantage to the organisation.

Focusing on in-kind support that is over and above the project's planned and costed priorities. Is not recommended. Realising the project's ambition will be challenging enough, so in the first instance the focus should remain on what has been determined to be essential for success.

16 Project Timeline

The redevelopment is provisional on a number of decisions being made at a political and governance level – in relationship to the Museum and related projects. The timeline needs to allow adequate time for the complexity of project set-up and procurement, preparing and relocating the collection, the vagaries of fundraising timeframes and the process of getting the right contractor.

Transition plan

A project of this complexity and scale will require a clear transition plan as it is set on a major project footing. Steps should include:

Project Board/Project Control Group

- Irrespective of the governance, arrangement a Project Redevelopment Board should be established – 3-4 people with the appropriate mix of professional project skills paid a commensurate fee⁷⁴ This is a project cost.
- Governance needs to work with the Project Board to prioritise the work/cost plan carefully – with an uncompromising focus on delivering a major project on time and on or under budget. The focus must be on the things that will make the greatest difference – while ensuring the ongoing trust of funders, partners, stakeholders and communities and meeting the kaitiakitanga responsibilities for the safety of the collections it holds on behalf of the communities of Southland.

The Project team

- The redevelopment should be seen as a major investment in a strategic asset, and this warrants a professional approach to resourcing - funding, personnel, project management methodologies etc. This will include specialist skills from within and outside of the staff and museum sector - including likely fixed term or contract roles such as project director, commercial lead, Te Ao Māori lead, Technology lead, Concept/experience development lead etc. This is a project cost.
- There needs to be a focus on ensuring the right team is 'on the bus' at all times - focused on the right mix of leadership, staff, consultants and contractors - with a view to building the capacity and capability of the team who will go on to run the new museum once it opens A plan for the development, review and ongoing recruitment of personnel (staff, contractors, consultants etc) at critical stages should be developed early in the project period.
- Ken Gorbey's paper *Fundamental change issues at Southland Art Gallery and Museum* 2012 (an addendum to the initial business case) outlines the principles and considerations that should be followed.

Collections

- Even though an 'imminent' redevelopment of the museum (which would inevitable require a collection relocation) has been on the table for over a decade the collection is in poor state of

⁷⁴ Reflecting professional skills but also a level of 'giving back' contribution to the project's success

readiness. This reflects a lack of prioritising on the part of the Board and management, resulting in significant deferred investment⁷⁵.

- Collection cataloguing is in a poor state which means the Board do not know what they hold, its relative significance or its overall volume etc. This clearly complicates accurate assessment of costs moving ahead. Whatever the issues that have led to this situation, the collections require immediate remedial 'catch up' resourcing. The caution is that after a period of neglect the forward approach should be measured. Funders *must* be assured that a professional, pragmatic and economic methodology is pursued.

⁷⁵ The delays in getting project go-ahead may be part of this, but as noted the project was perpetually a near-to-mid-term likelihood

	2019		2020		2021		2022	
Governance + ownership	<ul style="list-style-type: none"> Review of SMAG Governance completed ICC, SDC. GDC workshop on Governance 	<ul style="list-style-type: none"> SMAG/sector governance and ownership model(s) agreed 						
Regional collection store		<ul style="list-style-type: none"> RCS Feasibility report completed Overall projects' assumptions agreed 	<ul style="list-style-type: none"> Project Board(s) established Project director(s) appointed Project team/staff requirements assessed RCS concept design 	<ul style="list-style-type: none"> Development site/option underway Developed design Contractor procurement 	<ul style="list-style-type: none"> Final design 	<ul style="list-style-type: none"> Fit-out and commission 	<ul style="list-style-type: none"> SMAG collections moved 	
Southland Museum	<ul style="list-style-type: none"> Feasibility report completed 			<ul style="list-style-type: none"> Concept design Project team in place 	<ul style="list-style-type: none"> Preliminary design 	<ul style="list-style-type: none"> Developed design Main contractor procurement 		
ACI								
Funding		<ul style="list-style-type: none"> CAPEX and OPEX totals agreed Assessment of best approach to public funders 	<ul style="list-style-type: none"> Councils' CAPEX confirmed Foundation(s) set-up Application to public funders⁷⁶ 	<ul style="list-style-type: none"> Foundation(s) launched 				

A recommended approach (including aligning and assessing relative priority of the three projects)

Note: the 12-months highlighted in blue is the recommended period for key high-level decisions required for the redevelopment to progress to be made

⁷⁶ This should be progressed before the 2020 general election

task	2020		2021		2022		2023		2024		2025
Pop-up	Pop-up; regular changes		Pop-up: Long-term/ little change-out				No public presence ⁷⁷		Opening of new SM		Signature Project ⁷⁸
Project team⁷⁹	Needs assessment	Recruitment	Project director and staff/contractor team in place				Operational staff recruited & trained				
							Project team continues				
Project set up & planning	Project board [SM/RCS/ACI] director appointed Project brief developed to meet funder criteria				Collections moved Value management ⁸⁰						
Funding	Application to public funders	Foundation launched	Fundraising programme		Govt funding confirmed ⁸¹						
					Fundraising programme						
Siting, environmental, consents	Site tested & consents lodged		Consenting & permitting								
Design		Concept design	Preliminary design	Developed Design	Final design						
Tender		Design procurement		Main contractor procurement window							
Construction						demolition	Construction window				

A provisional Southland Museum redevelopment schedule, based on the assumptions on the previous page

⁷⁷ It will be important to focus all efforts and resources on preparations of opening, for *at least* a year. Ideally a level of involvement by community in the project and targeted offsite programmes (eg schools) will sustain interest

⁷⁸ The opening should attract a high level of attendance, profile and 'activation', but investment in a signature project should be scheduled 12-18 months later

⁷⁹ Made up of project director, consultants and staff

⁸⁰ A facilitated review of the design is recommended at this point, with the main contractor on board – to maximise functionality/reduce cost

⁸¹ The Ministry for Culture & Heritage are a 'funder of last resort' so will confirm when other funds have been secured

Note: Additional material is provided in Volume 2.