A RELATIONAL APPROACH TO DIGITISATION

Hocken's Kāi Tahu digitisation project and the Beattie papers – a case study



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ABSTRACT

This case study explores a relational approach to digitisation of collection material held at the Hocken Collections which was identified as culturally significant to Kāi Tahu.[1]

INTRODUCTION

In 2023, the Hocken Collections ('the Hocken') received funding from the University of Otago's General Alumni Appeal Fund for the purpose of digitisation for preservation of Hocken collection material of cultural and historical significance to Kāi Tahu. This article details the collaborative decisions made during the selection and preparation of material for digitisation, and its digital image capture and digital access, as enabled through the establishment of the Hocken's Māori archivist role and a Kāi Tahu digitisation advisory group. These decisions and processes exemplify a relational approach to digitisation – one that seeks to build and maintain trust in light of historical colonial practices within the context of Aotearoa's collecting institutions.

THE CONTEXT FOR DIGITISING CULTURALLY SIGNIFICANT MATERIAL AT THE HOCKEN

In recent years, heritage institutions globally have been instigating processes which both recognise and begin to deconstruct historical power imbalances in collections – especially collections which are by or about indigenous communities. For example, *The Tandanya Declaration*, made in October 2019 at the *International Council on Archives' Indigenous Matters Summit in Tandanya* (Adelaide, South Australia), called for public archives in colonial jurisdictions to acknowledge indigenous cognitive frameworks and knowledge authorities through "respectful engagement across imperial and indigenous worldviews."[2] Within archival collections, such processes have included repatriation and rematriation, reparative description, adoption of more diverse vocabularies, enhancing provenance information, and removing barriers to access to collections.

The Hocken's own journey in this direction began fairly recently.

The Hocken was established by Trust Deed in 1910 based on the gift of Dr Thomas Morland Hocken.[3] A renowned specialist research library, archive and gallery, the Hocken sits within Te Pātaka Mātauraka o Ōtākou Whakaihu Waka (the University of Otago Library) in Dunedin. In 2022, a review by the University Quality Advancement unit co-chaired by Edward Ellison and Professor Tony Ballantyne resulted in the *Review Recommendation Report*,[4] which included recommendations that the Hocken continue to build connections with Kāi Tahu whānui, who hold mana whenua (customary authority) status in the area on which the Hocken Library building stands. The review also recommended increasing access to collection material through digitisation and description work.

It is within this context, then, in 2023, that the Hocken embarked on a programme of digitisation specifically focused on the preservation and enhanced access to collection material of cultural significance to Kāi Tahu

Mā kā huruhuru ka rere te manu – A bird needs feathers to fly

The digitisation of the first tranche of material for the programme was made possible through a grant from the University of Otago's General Alumni Appeal Fund. The grant, intended to increase visibility and access of archives, covered the cost of contracting New Zealand Micrographic Services to carry out the digitisation work onsite at the Hocken from September to October 2023.

Additional funding also enabled the Hocken to establish an initially fixed-term Māori archivist role to support digitisation work. In March 2023 I was seconded into the role, transferring to the Hocken's Archives team. The main purpose of my role was to enhance access for iwi and whānau to the Hocken's archival collections by researching, listing and describing collections of interest to Kāi Tahu

Nā tāu rourou, nā taku rourou, ka ora ai – taking a relational approach

In her 2004 article 'Kaitiakitanga: the role of the Māori Archivist', Jeanette Wikaira (at that time working at the Hocken) described some of the challenges experienced by Māori working in kaitiaki roles within Aotearoa's cultural heritage institutions. Wikaira proposed that:

> change is not going to be effective until a [Māori] world view permeates at all levels... a world-view that incorporates [Māori] values, perspectives and people who work together with mutual respect and can make decisions about [Māori] cultural heritage in equal partnership with [Pākehā].[5]

Taking a lead from Wikaira's vision, I focused on building relationships and sharing information via regular email updates to a wider Kāi Tahu audience. This included local rūnaka (marae-based governing bodies) and their members, the

Ngāi Tahu Archive, Kāi Tahu historians and other Kāi Tahu individuals working within heritage institutions.

Hocken staff also established a Kāi Tahu digitisation advisory group to discuss tikanga around care and handling of archival taonga, description, cultural statements and digital access. This comprised of mana whenua and rakatahi (youth) representatives from three local rūnaka, Ngāi Tahu Archive staff, a Ngāi Tahu historian and Hocken staff. The scope of the group was to:

- Provide feedback/support in response to regular email updates from the Māori archivist relating to material in the Kāi Tahu digitisation project;

- Offer support and advice in response to 'ad hoc' requests regarding specific issues/challenges throughout the project (by email); and

- Attend two advisory group hui (in person or online, approximately three hours each) to discuss and advise on guiding tikanga, selection, description and access.

Reciprocity remains an important and ongoing aspect of the project. Mana whenua and rakatahi members of the advisory group were acknowledged by koha (contribution or gift following Māori protocol) and were invited to the launch of the digitised collection. Copies of the high-resolution files and descriptive metadata were also gifted to the Ngāi Tahu Archive and will be made available on Ngāi Tahu Archive's digital repository, *Kareao*, in due course.[6] Dialogue continues between the Hocken and the Ngāi Tahu Archive about the Hocken's digitisation and description work as it relates to Kāi Tahu.

KEY PHASES OF WORK

Selection

Through consultation with local rūnaka and the Ngāi Tahu Archive, the *James Herries Beattie papers* (ARC-0162, from now on referred to as the *Beattie papers*) were selected as the main focus for the first tranche of digitisation work in the ongoing Kāi Tahu digitisation programme. The *Beattie papers* are one of the most significant collections held by the Hocken, and there was a sense of excitement evident in the suggestion that the entire collection of more than 20,000 pages be made digitally accessible.

The advisory group also identified other material of significance to Kāi Tahu that was held at the Hocken, and which could be appropriate for digitisation in future. This included the *Chapman papers*, *Octavius Harwood papers*, *Edward Shortland journals*, and early church registers.

The Beattie papers

An article by David McDonald in the third issue of *Archifacts* in September 1974 outlined the Beattie papers and their significance to the study of both Māori and European history of

the South Island.[7] The papers include correspondence, newspaper clipping books, notebooks, childhood diaries, manuscripts of published and unpublished works, typescripts, ephemera, plans, photographs, sketches and illustrations.[8] Much indexing and description work of the collection has been done by Hocken staff, but digitisation offered an opportunity for much greater access and use.

A significant part of the *Beattie papers* are the records of interviews with South Island Māori (including from Kāi Tahu, Kāti Māmoe and Waitaha) that were conducted by Beattie in 1920 in collaboration with H.D. Skinner of the Otago Museum.[9] During his lifetime, Beattie travelled by train and bicycle to communities around Te Waipounamu and interviewed more than 130 South Island Māori, including people such as Eruera Poko Cameron, Tiemi Haereroa Kupa, Taare Reweti Te Maiharoa, Tuhituhi Te Marama, Teone Taare Tikao, Eruera Kingi Kurupohatu, Tieke Pukurākau and John Pūao Rakiraki.[10]

Used together with iwi traditional knowledge, Beattie's research notes have become a source of information on place names for Kā Huru Manu (the Ngāi Tahu cultural atlas). The notes have also been used to support biographical information in *Tāngata Ngāi Tahu/People of Ngāi Tahu*, and to inform the claims made to the Waitangi Tribunal under the *Wai 27* claims district.[11] The *Beattie papers* were listed on the UNESCO Memory of the World Aotearoa New Zealand Register in 2018.[12]

Preparing the papers for digitisation

Once the selection of priority items for digitisation had been agreed on – namely, the entirety of the *Beattie papers* held in the Hocken's archival collection – the papers were prepared for digitisation. The items were assessed for size, fragility and content. Some items, such as large bundles of correspondence were given individual piece-level reference codes and descriptions. Items were labelled clearly using archival-quality acid-free paper and brass paper clips, with notes for the image technicians relaying any specific requirements around handling. During this process, a spreadsheet listing each item was prepared including reference codes, file names, file type and size, and any additional notes which would aid the image technicians in their work.

Digital imaging

New Zealand Micrographic Services (NZMS) were contracted by the Hocken to carry out high resolution digital imaging on-site over a five-week period in September-October 2023. Leading up to that time, Hocken staff had prepared a working space for the NZMS image technicians with required lighting conditions.

The team from NZMS were welcomed to the Hocken with a mihi whakatau (an informal

welcoming ceremony) by Hocken staff and mana whenua representatives from Ōtākou and Puketeraki Rūnaka. The mihi whakatau gave the NZMS team the opportunity to meet local rūnaka representatives and to get a sense of the significance of the project to the communities.

Two NZMS image technicians worked five days a week, at a rate of around 1000 images per day, to create more than 20,000 high-resolution, preservation quality images of the *Beattie papers*. After physical items were digitally imaged, they were returned to the archives workroom for processing and then returned to the temperature- and humidity-controlled stack. NZMS delivered the digital image files to the Hocken at the end of 2023.

Description

Enhanced description of the collection – particularly identifying subject headings – is ongoing. Enhanced description of records within the Beattie collection was discussed by the advisory group and it was decided that names and place names should be prioritised in description work. As a result, I am continuing to work on enhancing name descriptions with my Hocken colleagues, entering metadata into a spreadsheet to be imported into the Hocken's archival collection management system (MINISIS). In many cases, new personal and place name authorities needed to be created on the system. Two iwi subject headings were also applied to all Kāi Tahu material within the digitised Beattie collection, these being *Kāi Tahu* and *Ngāi Tahu.*

Developing Taoka Māori statements for access

The Hocken's Kāi Tahu digitisation advisory group thoroughly discussed the risks of providing digital open access to the Beattie papers, and a consensus was reached that the benefits outweighed the need to place restrictions on material. Instead, the group decided that a clear *Taoka Māori statement* should accompany Māori material displayed on the Hocken Digital Collections website, and that terms of use – as well as unambiguous descriptions of inappropriate use – should be plainly stated.

The advisory group used the Tauranga City Libraries' *Kaitiakitanga framework* as a starting point for developing a locally-contextualised version of a Taoka Māori statement.[13] The Taoka Māori statement applied to taoka with no known copyright reads as follows:

> Taoka Māori materials provided by the Hocken Collections need to be used appropriately. Whilst no known copyright exists, it may be appropriate to seek endorsement from the iwi, hapū, whānau group/s or individuals to whom this Taoka Māori material relates. When using this material, the mana and dignity of the subjects depicted within should be respected and upheld, in accordance with Te Tiriti o Waitangi.

The extended terms of use went on to define *Taoka Māori* materials as "items, images, published or archival material within the collection which depict or describe:

- Māori individuals (either living or deceased), whānau, hapū or iwi;

- archaeological, historic and contemporary artefacts and visual culture relating to and/or created by Māori;

- traditional rohe (tribal areas), wāhi tapu (sacred sites), mahika kai (food-gathering sites) and kāika (homes or villages) where Māori lived, and/or continue to live;

- mātauraka Māori (systems of knowledge), pūrākau (cultural narratives), tikaka (practices), reo Māori (language), whakapapa (genealogies), ikoa (Māori names), and tūtohu whenua (place names)."[14]

The advisory group also suggested that examples of *inappropriate use* of *Taoka Māori* materials should be stated. A list of examples was developed as follows:

- "Altering images, for example by inappropriate stretching, cropping, fading, altering colours, or replacing any part of an image.

- Printing images on any surface which might:

- be walked on or sat on (e.g. doormats, rugs or cushions);

- be damaged as part of regular use (such as dartboards); or

- come into contact with food (e.g. tea towels, coffee mugs, cake decorations).

- Commercial use, including selling or distributing copies of images for financial gain, unless you have been granted permission from the Hocken Collections to reproduce an image for a specific commercial use (e.g. public display, publication, or use in filming).

- Displaying or describing images in ways that are intended to offend, disparage, or belittle the people, places or subjects depicted within."[15]

An abridged version of the terms of use statement is viewable on the Hocken's *Digital Collections* Recollect website at the time of writing.[16]

Another aspect of access discussed by the advisory group was around how the items would be displayed. A sub-group gave feedback on presentation which resulted in two separate portals on *Digital Collections* – one forthe entire *Beattie papers* collection, a second for digitised Kāi Tahu material.

Updating data and metadata

I can't write this case study without acknowledging the generous work of the University of Otago Library Systems team, who updated data on the library's systems and websites in preparation for the launch of the digitised *Beattie papers* collection. In addition, I must give special thanks to my colleague, Archivist David Murray, who wrangled data from my spreadsheets into *Digital Collections*.

Launch event

The digitised collection of the *Beattie papers* was launched on *Digital Collections* on 6 June 2024. Having an in-person event was another chance to build interpersonal connections: the launch event gathered together mana whenua from Ōtākou, Puketeraki and Moeraki rūnaka, descendants and relations of James Herries Beattie, staff members from across Ōtākou Whakaihu Waka, members of the Kāi Tahu digitisation advisory group, staff from the Ngāi Tahu Archive, NZMS staff, board members of UNESCO Memory of the World Aotearoa New Zealand, and others. Copies of the high-resolution files were gifted to the Ngāi Tahu Archive at the launch event.

NEXT STEPS

As with all digitisation work, there is always more that could be done. Some possible next steps in terms of the Beattie papers include digitising and providing access to Beattie's published works, developing easy-to-use finding aids, and working together with the Ngāi Tahu Archive and whānau members to index, transcribe and/or further describe the digitised material (including adding Ngā Upoko Tukutuku subject headings).[17] Other possible next steps include exploring further options for signalling traditional knowledge provenance, and ensuring appropriate attribution and use (for example, by piloting the application of Traditional Knowledge Notices and Labels).[18]

While the project's Kāi Tahu digitisation advisory group has ended its term, it continues to serve as an exemplar to the Hocken and the wider University of Otago Library of partnership with mana whenua in action. The digitisation of collection material of significance to Kāi Tahu continues to be one of the Hocken's digitisation programme priorities, with the Hocken's newly established Digital Capture Unit enabling digitisation to continue in-house.

ENDNOTES

1. The southern dialect form 'Kāi Tahu' is used here to refer to Ngāi Tahu, the principal iwi (Māori tribal authority) in Te Waipounamu, the South Island of Aotearoa New Zealand.
2. International Council on Archives Expert Group on Indigenous Matters, "Tandanya – Adelaide declaration", 2020, available at https://www.naa.gov.au/sites/default/files/2020-06/Tandanya-Adelaide-Declaration.pdf, accessed 30 May 2025.
3. University of Otago, "About Hocken Collections", available at https://www.otago.ac.nz/library/hocken/about-hocken-collections, accessed 30 May 2025.
4. See page 4, Friends of the Hocken Collections,"F&J Flotsam and Jetsam", Vol. 96, May-June 2022, available at https://hockenfriends.org.nz/wp-content/uploads/2024/02/FJ-No-96-May-June-2022.pdf, accessed 14 July 2025
5. J Wikaira, "Kaitiakitanga: the role of the Māori archivist", Archifacts, April 2004, pp. 46-49.
6. See home page at Ngāi Tahu, "Kareao Home Page." n.d., available at https://kareao.nz/scripts/mwimain.dll?logon&application=ANON_UNION_VIEW&LANGUAGE=144&file=[ngai_tahu]home.html, accessed 14 July 2025.
7. D. McDonald, "New Zealand Collections: III. The Beattie papers", Archifacts Bulletin of the Archives Committee of the New Zealand Library Association, September 1974, pp. 4-7.
8. Hocken Digital Collections, "Herries Beattie Collection", 2024, available at https://hocken.recollect.co.nz/pages/beattie, accessed 30 May 2025.
9. ibid.
10. ibid.
11. ibid.
12. Memory of the World Aotearoa New Zealand, "Herries Beattie papers (1848-1972)", 2018, available at https://unescomow.nz/inscription/herries-beattie-papers-1848-1972, accessed 30 May 2025.
13. Tauranga City Libraries, "Waka Hourua, a model", 2021, available at https://paekoroki.tauranga.govt.nz/nodes/view/53930, accessed 30 May 2025.
14. Hocken Kāi Tahu digitisation advisory group (2024). *Taoka Māori statements.* [Unpublished manuscript].
15. ibid.
16. Hocken Digital Collections, "Use of Taoka Māori materials", [2025], available at https://hocken.recollect.co.nz/pages/copyright, accessed 25 July 2025.