Council Meeting - 28 June 2023

Meeting held in the Council Chamber at Level 2, Philip Laing House, 144 Rattray Street, Dunedin and livestreamed to the ORC YouTube Channel

Members:

Cr Cr Gretchen Robertson, Chairperson	Cr Tim Mepham
Cr Lloyd McCall, Deputy Chairperson	Cr Andrew Noone
Cr Alexa Forbes	Cr Bryan Scott
Cr Gary Kelliher	Cr Alan Somerville
Cr Michael Laws	Cr Elliot Weir
Cr Kevin Malcolm	Cr Kate Wilson

Senior Officer: Richard Saunders, Chief Executive

Meeting Support: Trudi Mclaren, Governance Support Officer

28 June 2023 10:00 AM

Agenda Topic — Page

1. WELCOME

2. APOLOGIES

3. PUBLIC FORUM

Requests to speak should be made to the Governance Support team on 0800 474 082 or to governance@orc.govt.nz at least 24 hours prior to the meeting, however, this requirement may be waived by the Chairperson at the time of the meeting.

No requests to Public Forum had been received at the time of this agenda being published.

4. CONFIRMATION OF AGENDA

Note: Any additions must be approved by resolution with an explanation as to why they cannot be delayed until a future meeting.

5. DECLARATION OF INTERESTS

Members are reminded of the need to stand aside from decision-making when a conflict arises between their role as an elected representative and any private or other external interest they might have. The ORC Councillor Register of Interests is published to the website.

Otago Regional Council

Council
MINUTES

Minutes of an ordinary meeting of the Otago Regional Council held in the Rosebank Lodge conference room, 265 Clyde Street, Balclutha on Wednesday 26 April 2023, commencing at 1:00 PM.

PRESENT

Cr Gretchen Robertson	*(Chairperson)*
Cr Lloyd McCall	*(Deputy Chairperson)*
Cr Alexa Forbes	
Cr Gary Kelliher	
Cr Michael Laws	
Cr Kevin Malcolm (online)	
Cr Tim Mepham	
Cr Andrew Noone	
Cr Bryan Scott	
Cr Alan Somerville	
Cr Elliot Weir	
Cr Kate Wilson	

1. WELCOME

Chairperson Gretchen Robertson welcomed Councillors, members of the public and staff to the meeting at 1:03 pm and gave a karakia. Staff present included Pim Borren, (Interim Chief Executive), Nick Donnelly (GM Corporate Services), Anita Dawe (GM Policy and Science), Gavin Palmer (GM Operations), Richard Saunders (GM Regulatory and Communications), Trudi McLaren (Governance Support), Liz Spector (Governance Support - online).

Clutha District Council Mayor Bryan Cadogan was also present to welcome members of the public and staff to the meeting and advised the Councillors of developments and challenges of Balclutha and the Clutha District.

2. APOLOGIES

There were no apologies.

3. PUBLIC FORUM

Shane Bocock of the Pomahaka Water Care Group attended to speak to their planting programme and provided an update on the Waipahi Wetland.

Pierre Marasti representing Extinction Rebellion spoke about Climate Change.

Adam Curry spoke online on the Free Fare Campaign.

Tessa Campbell of the Otago University Student Association spoke about the Free Fare Campaign.

Cr Malcolm left the meeting at 1.29pm

4. CONFIRMATION OF AGENDA

Cr Robertson stated that a request from a staff member was received prior to the meeting to consider the report *The Minister for the Environment's request for information on providing for vegetable production through regional plans* first under Matters for Consideration.

Resolution CM23-141: Cr Robertson Moved, Cr Wilson Seconded

That *Item 8.2* The Minister for the Environment's request for information on providing for vegetable production through regional plans *report be considered the first item of business under Matters for Consideration.*

MOTION CARRIED

5. DECLARATIONS OF INTERESTS

No changes to the Councillor Declarations of Interests were advised.

6. CONFIRMATION OF MINUTES

Resolution CM23-142: Cr Weir Moved, Cr Mepham Seconded

That *the minutes of the (public portion of the) Council meeting held on 22 March 2023 be confirmed as a true and accurate record.*

MOTION CARRIED

7. ACTIONS (STATUS OF COUNCIL RESOLUTIONS)

Councillors reviewed the open actions from resolutions of Council with staff. No changes were noted.

8. MATTERS FOR CONSIDERATION

8.1. The Minister for the Environment's request for information on providing for vegetable production through regional plans

The report was presented to inform the Council of the new requirement under section 27 of the Resource Management Act 1991 (RMA) to carry out annual reporting to the Minister for the Environment on ORC's intentions to provide for vegetable production. Anita Dawe (General Manager Policy and Science), Tom Dyer (Science Manager) and Fleur Matthews (Manager Policy and Planning) (online) were present to respond to questions about the report.

Chairperson Robertson advised a letter had been received from the Minister for the Environment, stating a requirement for the Council to provide information. She stated this letter was sent to all Councils (unitary and regional) in New Zealand. Ms Dawe confirmed that Policy and Science wished to bring it to the Council's attention and seek guidance on how to respond.

Following questions by Councillors, it was moved:

Resolution CM23-143: Cr Weir Moved, Cr Somerville Seconded

That the Council:

1) ***Notes*** *that the Minister for the Environment has requested annual reporting on Otago Regional Council's intentions to provide for vegetable production when implementing the National Policy Statement for Freshwater Management 2020.*
2) ***Notes*** *that the Otago Regional Council is required to submit a first report to the Minister by 19 May 2023.*
3) ***Approves*** *that the first annual report is prepared by staff with input from ORC's Chair and Deputy Chair and submitted to the Minister by ORC's Chief Executive under delegated authority and circulated to councillors when complete.*
4) ***Notes*** *that the first annual report to the Minister will be presented to Council at its meeting on 24 May 2023.*

MOTION CARRIED

8.2. Minor changes to Flood Protection Management Bylaw 2022

Council approval is required to correct errors in the base layer of some of the maps contained in the schedules to the Flood Protection Management Bylaw 2022 in accordance with the Local Government Act 2002 ("LGA"). Michelle Mifflin (Manager Engineering) and Alison Weaver (Team Leader Commercial and Regulatory) were present to respond to questions about the report.

Following questions by Councillors, it was moved:

Resolution CM23-144: Cr Laws Moved, Cr Wilson Seconded

That the Council*:*

1) ***Notes*** *this report.*
2) ***Approves*** *the minor changes to the Flood Protection Management Bylaw 2022 by adopting the maps in attachments 5 to 8 to replace the current maps shown in attachments 1 to 4.*

3) ***Approves*** *the public notification of the minor changes to the Flood Protection Management Bylaw 2022.*

MOTION CARRIED

8.3. Land and Water Regional Plan: Updated project plan and governance

The intention of this report was to provide Council with an updated milestone report for developing the proposed Land and Water Regional Plan (pLWRP) to reflect the new timeframe for notification (by 30 June 2024) and to seek approval for how key policy and milestone decisions are to be made during development of the pLWRP. Anita Dawe (General Manager Policy and Science) and Fleur Matthews (Manager Policy and Planning) (online) were present to respond to questions about the report.

Pim Borren (Interim Chief Executive) stated that he and Chairperson Robertson had anticipated a detailed project plan including resourcing, timelines, a business case, and budget, was to be before Councillors at this meeting. Richard Saunders (GM Regulatory) responded that a recently appointed Project Manager, Matthew Horton, was undertaking a review of the plan to ensure that the project ran professionally. Mr Saunders indicated he expected a number of recommendations would come out of Mr Horton's report which would be essential before a full project plan was completed.

Cr Mepham enquired as to whether the project was still expected to be completed by the agreed due date of June 2024. Ms Dawe confirmed that the proposed Land and Water Regional Plan will be drafted this year and the statutory consultation will occur at the beginning of 2024 and submitted to Council by the end to May or early June 2024. She also confirmed that the project team will be reaching out to appropriate experts in the field going forward.

Cr Wilson commented that she has some concerns regarding the Freshwater Management Units/Rohes which have only one Councillor responsible them. It was agreed that Cr Forbes should be added to the Upper Lakes Rohe, Cr Laws added to the Dunstan Rohe and Cr Kelliher added to Arrow & Cardrona (part of Dunstan Rohe). Councillors agreed on amended wording to the proposed resolution as recorded.

Resolution CM23-145: Cr McCall Moved, Cr Mepham Seconded

That the Council*:*

1) **Notes** the revised milestone report for the proposed Land and Water Regional Plan.

MOTION CARRIED

Resolution CM23-146: Cr Laws Moved, Cr Somerville Seconded

That the Council*:*

1) ***Approves*** *the Land and Water Regional Plan Governance Group's proposed approach that key policy and milestone decisions are work shopped by the Environmental Science and Policy Committee, before being considered by the Committee and then recommended to be noted by the Council.*

MOTION CARRIED

Resolution CM23-147: Cr Laws Moved, Cr McCall Seconded

That the Council:

1) ***Lays*** *the amended Terms of Reference for the Land and Water Regional Plan Governance Group on the table until the next Council Meeting, awaiting the independent project review by Matt Horton.*

MOTION CARRIED

Cr Laws left the meeting at 2:05pm
Cr Malcolm returned to the meeting at 2:08pm
Cr Weir left the meeting at 2:08pm
Cr Laws returned to the meeting at 2:09pm
Cr Weir returned to the meeting at 2:11pm

9. NOTICES OF MOTION

9.1. Notice of Motion - Request for ORC to join the Free Fare Campaign

A Notice of Motion was received from Cr Weir to authorise the Chief Executive to sign on to the Free Fares Campaign as a coalition member and release a press statement once the process is complete. Cr Weir spoke to this motion. He advised that it has gathered a lot of community support and he emphasised that there is no cost involved, it is only to indicate ORC support of the campaign for central government to improve public transport accessibility and will help improve a number of areas. He stated that he would eventually like to see free fares for all, but this is an important first step and a worthy gesture for our Council to support.

Councillors debated the merits of this proposal, Chairperson Robertson put the motion to the vote and a division was called for.

Resolution CM23-150: Cr Weir Moved, Cr Somerville Seconded

That the Council:

1) ***Authorises*** *the Chief Executive to sign onto the Free Fares Campaign as a coalition member and release a press statement once the process is complete.*

A division was called:

Vote

For:	Cr Forbes, Cr McCall, Cr Noone, Cr Scott, Cr Somerville, Cr Weir and Cr Robertson
Against:	Cr Kelliher, Cr Laws, Cr Malcolm, Cr Mepham and Cr Wilson
Abstained:	Nil

MOTION CARRIED 7 to 5

9.2. Notice of Motion - Request for report on feasibility of free off-peak travel

A Notice of Motion was received from Cr Weir requesting Council to authorize the Chief Executive to sign on to the Free Fares Campaign as a coalition member and release a press statement once the process was complete. Cr Weir advised that the Free Fares Campaign had gathered much community support and he emphasized there was no cost to join. He said by joining, the ORC signalled to Central Government its support for improved public access to transport. Cr Weir stated a goal of the campaign was to ultimately provide free public transport for everyone.

Following Councillor questions and debate the motion put:

Resolution CM23-151: Cr Weir Moved, Cr Mepham Seconded
That the Council:

1) ***Requests*** *a report to be drafted by the transport team for presentation to the PATC on the feasibility of free off-peak public transport and the potential costs (e.g., lost revenue) and benefits (e.g., reduced pressure at peak times, reduced delays at peak times, equity impacts, reputation impacts) to help inform relevant LTP decisions.*

A division was called:
Vote

For:	Cr Forbes, Cr Kelliher, Cr McCall, Cr Mepham, Cr Noone, Cr Scott, Cr Somerville, Cr Weir and Cr Robertson
Against:	Cr Laws and Cr Malcolm
Abstained:	Cr Wilson

MOTION CARRIED 9 – 2 with 1 abstention

10. CHAIRPERSON'S AND CHIEF EXECUTIVE'S REPORTS

10.1. Chairperson's Report

Cr Robertson submitted a matter for consideration to gauge whether Councillors would be interested in enabling proactive responses to requests for endorsement of funding applications if those applications met specific requirements. Following a discussion, Cr Robertson put the motion:

Resolution CM23-152: Cr Robertson Moved, Cr Laws Seconded
That the Council:

1) ***Notes*** *this report.*
2) ***Requests*** *the Chief Executive bring a draft policy to Council for the endorsement of external funding applications as per the requirements listed as follows:*
    a. *The application is to an external funding source*
    b. *The application is not seeking funding support directly from the ORC (this would need to be handled through a different assessment process)*
    c. *The application is for an initiative that supports existing ORC strategic priorities*
    d. *The Council is made aware of any initiatives endorsed under this policy*
    e. *The ORC response to the request is made in writing by the chair of the Council*

MOTION CARRIED

10.2. Chief Executive's Report

Interim CE Pim Borren was available to respond to questions about the report. Following a discussion, the report was noted.

Resolution: Cr Wilson Moved, Cr Weir Seconded
That the Chief Executive's report be noted.

Motion Carried

11. RESOLUTION TO EXCLUDE THE PUBLIC

Cr Laws requested that the items requested to be discussed in Public Excluded be discussed publicly. Pim Borren (Interim Chief Executive) advised reports go through a rigorous review

prior to any request they be considered with the public excluded. He also noted there is a process allowing the Chief Executive to release confidential items when appropriate. Cr Laws expressed the view that there should be a more robust system and indicated he would not participate in the confidential portion of the meeting.

Cr Laws left the meeting at 4:33 pm

Resolution: Cr Wilson Moved, Cr Noone Seconded:
That *the public be excluded from the following parts of this meeting, namely:*

- *Confidential minutes of the 22 March 2023 Council Meeting*
- *Confidential recommendations of the 23 March 2023 Audit and Risk Subcommittee meeting*

The general subject of each matter to be considered while the public is excluded, the reason for passing this resolution in relation to each matter, and the specific grounds under section 48(1) of the Local Government Official Information and Meetings Act 1987 for the passing of this resolution are as follows:

General subject of each matter to be considered	Reason for passing this resolution in relation to each matter	Ground(s) under section 48(1) for the passing of this resolution
1.1 Confidential Minutes of the 22 March 2023 Council Meeting	To protect information where the making available of the information—would be likely unreasonably to prejudice the commercial position of the person who supplied or who is the subject of the information – Section 7(2)(b)(ii) To protect information which is subject to an obligation of confidence or which any person has been or could be compelled to provide under the authority of any enactment, where the making available of the information—would be likely to prejudice the supply of similar information, or information from the same source, and it is in the public interest that such information should continue to be supplied – Section 7(2)(c)(i) To avoid prejudice to measures that prevent or mitigate material loss to members of the public – Section 7(2)(e) To enable any local authority holding the information to carry out, without prejudice or disadvantage,	Section 48(1)(a): Subject to subsection (3), a local authority may by resolution exclude the public from the whole or any part of the proceedings of any meeting only on 1 or more of the following grounds: (a) that the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding would exist.

	commercial activities – Section 7(2)(h) To prevent the disclosure or use of official information for improper gain or improper advantage – Section 7(2)(j)	
3.1 Recommendations of the 23 March 2023 Audit & Risk Subcommittee (confidential)	To protect information which is subject to an obligation of confidence or which any person has been or could be compelled to provide under the authority of any enactment, where the making available of the information—would be likely to prejudice the supply of similar information, or information from the same source, and it is in the public interest that such information should continue to be supplied – Section 7(2)(c)(i)	Section 48(1)(a): Subject to subsection (3), a local authority may by resolution exclude the public from the whole or any part of the proceedings of any meeting only on 1 or more of the following grounds: (a) that the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding would exist.

This resolution was made in reliance on section 48(1)(a) of the Local Government Official Information and Meetings Act 1987 and the particular interest or interests protected by section 6 or section 7 of that Act or section 6 or section 7 or section 9 of the Official Information Act 1982, as the case may require, which would be prejudiced by the holding of the whole or the relevant part of the proceedings of the meeting in public.

12. CLOSURE

There was no further business and Chairperson Robertson declared the meeting closed with a karakia at 4:36 pm.

_____ _____

Chairperson Date

Otago Regional Council

Council
MINUTES

Minutes of an ordinary meeting of the Otago Regional Council held in the Council Chamber, Level 2 Philip Laing House, 144 Rattray Street, Dunedin on Wednesday 24 May 2023, commencing at 1:00 PM.

PRESENT

Cr Gretchen Robertson	*(Chairperson)*
Cr Lloyd McCall	*(Deputy Chairperson)*
Cr Alexa Forbes	
Cr Gary Kelliher	
Cr Michael Laws (Online)	
Cr Tim Mepham	
Cr Andrew Noone	
Cr Bryan Scott	
Cr Alan Somerville	
Cr Elliot Weir	
Cr Kate Wilson	

1. WELCOME

Chairperson Robertson welcomed Councillors, members of the public and staff to the meeting at 1:01PM and said a karakia to start the meeting. Staff present included Pim Borren, (interim Chief Executive), Nick Donnelly (GM Corporate Services), Anita Dawe (GM Policy and Science), Joanne Gilroy (Acting Manager Regulatory), Kylie Darragh (Governance Support), Liz Spector (Governance Support), Mike Roesler (Manager, Corporate Planning), and Libby Caldwell (Manager Environmental Implementation, online),

2. APOLOGIES

Resolution: Cr Wilson Moved, Cr Kelliher Seconded:

That the apologies for Cr Malcolm and the lateness of Cr Laws be accepted.

MOTION CARRIED

3. PUBLIC FORUM

Mr Ray Parker spoke on the Taieri Flood and Drainage Scheme rating freeze and establishment of a liaison group.

Pierre Marasti from Extinction Rebellion spoke of the Intergovernmental Panel on Climate Change report and the effects of record ocean temperatures.

No questions were asked of either forum presenters.

4. CONFIRMATION OF AGENDA

The agenda was confirmed as published.

5. DECLARATIONS OF INTERESTS

No changes to Councillor Declarations of Interests were noted.

6. CONFIRMATION OF MINUTES

Approval of minutes of the 26 April 2023 Council meeting was removed from consideration and those minutes will be reconsidered at the 28 June 2023 Council meeting.

7. ACTIONS (STATUS OF COUNCIL RESOLUTIONS)

Open actions from resolutions of Council were reviewed. No changes were noted.

8. MATTERS FOR CONSIDERATION

8.1. Annual Plan 2023-24 Adoption

This report was provided to enable Council to formally approve changes to the draft estimates and work programme as provided to the community for feedback, to adopt the Annual Plan 2023-24, and to enable staff to calculate and present the rating resolution at the 28 June 2023 Council meeting. Mike Roesler (Manager Corporate Planning) and Nick Donnelly (GM Corporate Services) were available to respond to questions.

Following questions by Councillors it was moved:

Resolution CM23-153: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) ***Notes*** *the community feedback on the Otago Regional Council Draft Annual Plan 2023/24.*

MOTION CARRIED

Cr Laws requested his vote against the motion be recorded.

Resolution CM23-154: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) *Notes Council Staff have included funding changes in the draft Annual Plan 2023/24 for Upper Clutha Wilding Tree Group for $30,000 and reallocation/reprioritisation of engineering budgets to support Dunedin Tracks Network's completion of the Wingatui to Waihola section of the trail.*

MOTION CARRIED

Resolution CM23-155: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) ***Notes*** *the changes to the Taieri Flood and Drainage Scheme that have been made to the approved draft Annual Plan financial estimates that are now included in the Annual Plan 2023-24 presented at the 24 May 2023 Council meeting for adoption.*

MOTION CARRIED

Resolution CM23-156: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) ***Notes*** *the supplementary paper to this meeting titled 'Annual Plan – additional content' provides the 'Funding Impact Statement – Calculation of Rates for the 2023/2024 Year' to be included in the Annual Plan 2023-24.*

MOTION CARRIED

Resolution CM23-157: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) ***Approves*** *the Otago Regional Council Schedule of Fees and Charges applicable from 1 July 2023.*

MOTION CARRIED

Cr Kelliher requested his vote against the motion be recorded.

Cr Laws requested his vote against the motion be recorded.

Resolution CM23-158: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) ***Resolves*** *that it is financially prudent to have an annual operating surplus of $984,000 for the 2023-2024 Annual Plan year*

MOTION CARRIED

Resolution CM23-159: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) ***Adopts*** *the Otago Regional Council Annual Plan 2023-24 as circulated with this report.*

MOTION CARRIED

Resolution CM23-160: Cr Wilson Moved, Cr Noone Seconded
That the Council:

1) ***Approves*** *the delegation of minor editorial corrections, formatting, and inclusion of 'Funding Impact Statement – Calculation of Rates for the 2023/2024 Year' to the Annual Plan 2023-24 to the Otago Regional Council Chief Executive.*

MOTION CARRIED

8.2. Funding for Upper Clutha Wilding Group

This report sought Council approval for funding in the 2023/2024 financial year to the Upper Clutha Wilding Tree Group to control wilding conifers in the Upper Clutha Area.
Libby Caldwell was available to respond to questions.

Cr Noone asked where the funding for this would come from. Dr Borren stated staff would review current budgets to find programme funding. Following further discussion, a motion was made:

Resolution CM23-161: Cr Noone Moved, Cr Forbes Seconded
That the Council:

1) ***Approves*** *allocation of $30,000 to the Upper Clutha Wilding Tree Group to support control work as detailed in the staff report for the 2023/24 annual plan to be funded by yet to be ascertained savings.*

MOTION CARRIED

8.3. Requesting an extension for decisions on the proposed Otago Regional Policy Statement

The paper updated Council on progress with the hearing of submissions on the non-freshwater parts of the proposed Otago Regional Policy Statement 2021 (PORPS21), and to seek approval for the Chair to request an extension to the time period within which Council must give decisions on submissions from the Minister for the Environment. Fleur Matthews (Manager Policy) and Anita Dawe (GM Policy and Science) were available to respond to questions.

Following a discussion of the staff report, Cr Wilson moved:

Resolution CM23-162: Cr Wilson Moved, Cr McCall Seconded

That the Council*:*

1) ***Notes*** *this report.*
2) ***Instructs*** *the Chairperson to write to the Minister for the Environment seeking an extension of time for issuing decisions on the non-freshwater parts of the proposed Otago Regional Policy Statement 2021 until 31 March 2024.*

MOTION CARRIED

8.4. ECO Fund Recommendations and Incentives Fund

Cr McCall declared an interest in this item and left the room during its consideration.

Cr Noone declared an interest and stated he would abstain from voting on recommendation two.

Cr Wilson declared an interest and sat back from the table during its consideration.

The report sought Council approval to fund the recommended ECO Fund applications and applications for additional Incentives Funding for the March 2023 round, Richard Ewans (Partnership Lead - Biodiversity) and Anna Malloy (Principal Advisor - Environmental Implementation) were available to respond to questions.

Cr Mepham asked whether the ECO Fund was underfunded. Mr Ewans noted there would a review done following completion of the funding round which would include a review of the funding provided.

There were no further questions, and Cr Somerville moved:

Resolution CM23-163: Cr Somerville Moved, Cr Forbes Seconded

That the Council*:*

1) ***Notes*** *this report.*

MOTION CARRIED

Resolution CM23-164: Cr Somerville Moved, Cr Forbes Seconded

That the Council*:*

1) ***Approves*** *the funding recommendations of the ECO Fund Assessment Panel for the March 2023 round to a total value of $536,470.*

MOTION CARRIED

Cr Noone abstained from this motion.

Resolution CM23-165: Cr Somerville Moved, Cr Forbes Seconded
That the Council*:*

1) ***Notes*** *that the annual review of ECO Fund will be completed by December 2023 in time for the next round in March 2024.*

MOTION CARRIED

8.5. Draft submission on National Direction on Renewable Energy Generation and Electricity Transmission

This paper recommended Council lodge a submission on the Ministry for Business, Innovation, and Employment's (MBIE) consultation paper "*Strengthening National Direction on Renewable Electricity Generation and Electricity Transmission*". Anita Dawe (GM Policy and Science) was available to respond to questions. Warren Hanley (Senior Resource Planner Liaison) was also available online.

Following a discussion of the submission, Cr Weir noted any changes to the draft submission could be reviewed by the Submissions Working Group. Cr Weir then moved:

Resolution CM23-166: Cr Weir Moved, Cr Noone Seconded
That the Council*:*

1) ***Notes*** *this report.*
2) ***Approves*** *the recommendation for ORC to lodge a submission on MBIE 'Strengthening national direction on renewable electricity generation and electricity transmission' consultation document by 1 June 2023, with agreed submission points recommended in this report, and any additional submission points directed by Council.*
3) ***Notes*** *that the submissions working group will review the submission ahead of it being lodged.*

MOTION CARRIED

8.6. LGNZ Conference and AGM Attendance 2023

This paper sought agreement on ORC attendance at the Local Government New Zealand conference 2023 and Annual General Meeting, and to nominate an ORC presiding delegate to vote on the remits at the AGM.

Resolution CM23-167: Cr Wilson Moved, Cr Weir Seconded
That the Council*:*

1) ***Notes*** *this report.*
2) ***Nominates Cr Robertson, Cr Weir, and Cr McCall*** *and the Richard Saunders, CE as ORC's representatives to attend the LGNZ conference from 26-28 July.*
3) ***Nominates*** *Cr Robertson, Cr McCall and Richard Saunders, CE to attend the LGNZ AGM on 26 July.*

4) ***Nominates*** *Cr Robertson as the presiding delegate for the AGM to vote on behalf of the ORC on the remits.*
5) ***Notes*** *remits will be shared with Councillors once received for discussion ahead of voting.*

MOTION CARRIED

Cr Weir then made a subsequent motion to nominate the ORC staff for work in Intensive Winter Grazing for one of the LGNZ 2023 award categories.

Resolution CM23-168: Cr Weir Moved, Cr Wilson Seconded
That the Council:

1) Nominate ORC in the SuperEngaged Award category in the 2023 LGNZ SuperLocal Awards for staff's work on Intensive Winter Grazing.

MOTION CARRIED

9. RECOMMENDATIONS ADOPTED AT COMMITTEE MEETINGS

9.1. Recommendations of Environmental Implementation Committee

Resolution CM23-169: Cr Somerville Moved, Cr Scott Seconded
That the Council adopts the resolutions of the 11 May 2023 Environmental Implementation Committee.

MOTION CARRIED

9.2. Recommendations of the Public and Active Transport Committee

Resolution CM23-170: Cr Wilson Moved, Cr Noone Seconded
That the Council adopts the recommendations of the 10 May 2023 Public and Active Transport Committee.

MOTION CARRIED

10. CHAIRPERSON'S AND CHIEF EXECUTIVE'S REPORTS

10.1. Chairperson's Report

Cr Robertson noted this meeting represented the last Council Meeting for two people who had been very involved with the Council, Committee Secretary and Governance Support Officer Liz Spector and the interim Chief Executive Dr Pim Borren.

Resolution CM23-171: Cr Robertson Moved, Cr Noone Seconded
That the Council:

*1) **Notes** this report.*

MOTION CARRIED

10.2. Chief Executive's Report

Resolution CM23-172: Cr Noone Moved, Cr Mepham Seconded
That the Council:

*1) **Notes** this report.*

MOTION CARRIED

Resolution: Cr Mepham Moved, Cr Wilson Seconded
That the Council:

*1) **Notes** the attachments to the report*

MOTION CARRIED

11. RESOLUTION TO EXCLUDE THE PUBLIC

Resolution: Cr Robertson Moved, Cr Wilson Seconded:
That the meeting move into public excluded per the order paper to consider:

- *Confidential minutes of the 26 April 2023 Council Meeting*
- *Chief Executive Performance Agreement and Review Timetable 2023/24*

MOTION CARRIED

Resolution: Cr Wilson Moved, Cr Noone Seconded:
I move that the public be excluded from the following parts of this meeting, namely:

- *Approval of the Confidential Minutes of the 26 April 2023 Council Meeting*
- *Chief Executive Performance Agreement and Review Timetable 2023/24*

I also move that Doug Craig be permitted to remain at this meeting, after the public has been excluded, because of their knowledge of the Chief Executive KPIs. This knowledge, which will be of assistance in relation to the matter to be discussed, is relevant to that matter.

MOTION CARRIED

The general subject of each matter to be considered while the public is excluded, the reason for passing this resolution in relation to each matter, and the specific grounds under section 48(1) of the Local Government Official Information and Meetings Act 1987 for the passing of this resolution are as follows:

General subject of each matter to be considered	Reason for passing this resolution in relation to each matter	Ground(s) under section 48(1) for the passing of this resolution
Confidential Minutes of the 26 April 2023 Council meeting	To protect information where the making available of the information— would be likely unreasonably to prejudice the commercial position of the person who supplied or who is the subject of the information – Section 7(2)(b)(ii) To protect information which is subject to an obligation of confidence or which any person has been or could be compelled to provide under the authority of any enactment, where the making available of the information— would be likely to prejudice the supply	Section 48(1)(a): Subject to subsection (3), a local authority may by resolution exclude the public from the whole or any part of the proceedings of any meeting only on 1 or more of the following grounds: (a) that the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good

	of similar information, or information from the same source, and it is in the public interest that such information should continue to be supplied – Section 7(2)(c)(i) To avoid prejudice to measures that prevent or mitigate material loss to members of the public – Section 7(2)(e) To enable any local authority holding the information to carry out, without prejudice or disadvantage, commercial activities – Section 7(2)(h) To prevent the disclosure or use of official information for improper gain or improper advantage – Section 7(2)(j)	reason for withholding would exist.
3.1 Chief Executive Performance Agreement and Review Timetable 2023/24	To protect the privacy of natural persons, including that of deceased natural persons – Section 7(2)(a)	Section 48(1)(a): Subject to subsection (3), a local authority may by resolution exclude the public from the whole or any part of the proceedings of any meeting only on 1 or more of the following grounds: (a) that the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding would exist.

This resolution is made in reliance on section 48(1)(a) of the Local Government Official Information and Meetings Act 1987 and the particular interest or interests protected by section 6 or section 7 of that Act or section 6 or section 7 or section 9 of the Official Information Act 1982, as the case may require, which would be prejudiced by the holding of the whole or the relevant part of the proceedings of the meeting in public.

12. CLOSURE

There was no further business and Chairperson Robertson declared the meeting closed at 3:39 pm.

_____ _____

Chairperson Date

Action Register

Search Criteria

Showing Completed Items: Yes
Include Items Completed From: 20/05/2023

Applied Filters

Start Meeting Date: 1st Oct 2022
End Meeting Date: 20th Jun 2023
Action Statuses: Assigned, In Progress, Completed
Meeting Type: Council

Generated By: Kylie Darragh
Generated On: 20/06/2023 at 12:45pm

Document	Item	Status	Action Required	Assignee/s	Action Taken	Due Date
Council Meeting 2023.02.22	CS2304 Annual Plan 2023/24	Assigned	Have an independent efficiency review performed in FY 2023/24 to inform the Long-Term Plan process. **CM23-111**	Chief Executive, General Manager Transport		31/12/2023
Council Meeting 2023.02.22	GOV2286 Proposal for Participating in a Regional Sector Shared Services Council Controlled Organisation	Completed	Undertake steps to become a shareholder in Regional Software Holdings Ltd including the signing of a Deed of Accession. **CM23-113**	General Manager Corporate Services and CFO	**20/06/2023 General Manager Corporate Services and CFO** Deed of Accession was signed on 7 June 2023 and has been sent to RSHL for ratification at their Board Meeting.	22/03/2023
Council Meeting 2023.03.22	GOV2306 Proposal to participate in CouncilMARK programme	Assigned	The Chief Executive will execute an agreement with CouncilMARK to undertake an independent assessment in 2023. **Res CM23-130**	Chief Executive		06/12/2023
Council Meeting - Confidential 2023.03.22	GOV2308 Appointment of Iwi Representatives to Committees	In Progress	Amend Committee Terms of Reference to reflect appointments Res. CM23-139	Governance Support Officer	**17/04/2023 Governance Support Officer** Awaiting further information on updating.	30/04/2023
Council Meeting 2023.05.24	SPS2312 Requesting an extension for decisions on the proposed Otago Regional Policy Statement	Assigned	The Chairperson to write to the Minister for the Environment to seek an extension to issue decisions on the non-freshwater parts of the pORPS2021 until 31 March 2024. **Res CM23-162**	Chairperson		30/06/2023
Council Meeting 2023.05.24	GOV2318 LGNZ Conference and AGM Attendance 2023	Completed	Prepare an application for the SuperEngaged Award category in LGNZ's 2023 SuperLocal Awards programme. **Res CM23-168**	General Manager Governance, Culture and Customer	**13/06/2023 General Manager Governance, Culture and Customer** Application submitted on 31 May 2023.	31/05/2023

8.1. Freshwater Farm Plans

Prepared for:	Council
Report No.	REG2302
Activity:	Governance Report
Author:	Libby Caldwell, Manager Environmental Implementation
Endorsed by:	Joanna Gilroy, Acting General Manager - Regulatory
Date:	28th June 2023

PURPOSE

[1] To provide an update on Freshwater Farm Plans (FWFPs) and to seek endorsement of the phased rollout approach to FWFPs for the Otago region.

EXECUTIVE SUMMARY

[2] Freshwater Farm Plans (FWFPs) were introduced as part of the Government's Freshwater Package in 2020. The regulations supporting these plans were gazetted in early June 2023 and will come into force from the 1st of August 2023, with a phased rollout occurring across the country. FWFPs will encourage and support on farm actions. These plans will be property specific and provide farmers the flexibility to find the right solution for their farm and catchment. Many farmers already have a farm environment plan, or are part of an industry programme and freshwater farms plans will build on that work. The regulations also set up a new system of certifiers and auditors for FWFPs.

[3] The Ministry for the Environment (MfE) has confirmed that Otago will be amongst the second tranche of regions whereby the national Freshwater Farm Plan regulations will "turn on", via an Order in Council (OIC) process. This is proposed to occur in August 2023. At this stage, ORC understand that this includes discretion to phase rollout of the regulations by geographic area within the region. The regulations stipulate that farmers have 18 months to submit a FWFP to a certifier once the regulations are live in their location, and it is understood that the latest the regulations must turn on in a region is the end of 2025.

[4] The current step in the FWFP process for ORC is deciding what order we want the regulations to turn on in Otago. To meet MFE timeframes a draft rollout order has been provided to MFE for inclusion in the Order In Council for Otago's rollout. This draft rollout order has been based on a number of factors and endorsement of this rollout from Council is sought.

[5] Engagement with mana whenua has commenced and is ongoing through Aukaha and Te Ao Marama and they are generally supportive of the proposed roll-out detailed in this document.

RECOMMENDATION

That the Council*:*

1) ***Notes** this report.*
2) ***Endorses** the phased rollout approach to FWFPs as set out in Table 1 titled 'Proposed phasing order for Otago'.*

BACKGROUND

What are freshwater farm plans?

[6] Freshwater Farm Plans (FWFPs) were introduced as part of the Government's Freshwater Package in 2020 and are a legal instrument established under Part 9A of the RMA. FWFPs will encourage and support on farm actions to reduce a farm's impact on freshwater. The regulations supporting these plans were gazetted in early June 2023 and will come into force from the 1st of August 2023 with a phased rollout occurring across Aotearoa.

[7] FWFPs will encourage and support on farm actions to reduce a farm's impact on freshwater. These plans will be property specific and provide farmers the flexibility to find the right solution for their farm and catchment. Many farmers already have a farm environment plan or are part of an industry programme and freshwater farms plans will build on that work. The regulations set up a new system of certifiers and auditors for FWFPs.

Why are freshwater farm plans needed and who needs them?

[8] FWFPs are part of the Essential Freshwater package introduced in 2020 to:

- stop further degradation of New Zealand's freshwater resources and improve water quality within five years; and
- reverse past damage and bring New Zealand's freshwater resources, waterways and ecosystems to a healthy state within a generation.

[9] Plans will be needed for properties if they trigger the land use thresholds. These triggers are shown below:

- 20 or more hectares of the farm is arable land use; or
- 5 or more hectares of the farm is horticultural land use; or
- 20 or more hectares of the farm is pastoral land use; or
- a prescribed area of the farm is other agricultural land use prescribed in regulations made under section 217M(1)(b); or
- 20 or more hectares of the farm is a combination of any 2 or more of the land uses described above.

What does this mean for Otago?

[10] The Ministry for the Environment (MfE) has confirmed that the Otago region will be amongst the second tranche of regions whereby the national Freshwater Farm Plan regulations will "turn on", via an Order in Council (OIC) process which is proposed to occur in August 2023. Staff understand that this includes discretion to phase commencement of the regulations (by geographic area) within the region. The regulations stipulate that farmers have 18 months to submit a FWFP to a certifier once the regulations are live in their location, and it is understood that the latest the regulations must turn on in a region is the end of 2025.

[11] MfE have confirmed that the second tranche of regions to go live will occur on 1st February 2024. This includes the Otago region as well as West Coast. Horizons and Greater Wellington are also considering whether they go live as part of tranche 2 rather than tranche 3.

[12] The Waikato and Southland regions are in the first tranche and are due to go live in August 2023.

Catchment challenges, context and values

[13] In conjunction with the phased rollout there is a requirement for Council to develop Catchment challenges, context and values (CCCV) for each area FMU/Rohe. This work needs to be completed by Council and be available for people to use as part of their farm plan. CCCV is to be publicised as soon as possible after the regulations are turned on in the region. After the rollout order is confirmed staff will commence work on the CCCV's and develop a project and implementation plan.

[14] The purpose of the CCCV is to provide catchment context information to a farmer so that they can understand the risks in their catchment. This means they can identify actions they can take at a property level which will contribute to water quality enhancement. The CCCV needs to include matters such as existing information on landforms, soil data, climate data, freshwater data, freshwater bodies, contaminants, sites that are significant to the community, and significant species or ecosystems and the regulatory context.

[15] The CCCV needs to be made publicly available and can be displayed geospatially. It can also be updated on an as needed basis. Certifiers and auditors will need to be upskilled through regional training so that they understand CCCV. This will be a requirement for them to operate in Otago. It will be ORC's role to ensure that they are equipped with the right information to support appropriate FWFP rollout across Otago.

DISCUSSION

[16] The current step in the FWFP process for ORC is deciding what order we want the regulations to 'turn on' in Otago.

[17] MfE are currently drafting the OIC to go through cabinet in August and to finalise this need the information around the proposed roll-out for the region for them to consider.

[18] In developing a proposed roll out for the Otago Region, the following assumptions have been made and design principles used.

Assumptions:

- The Ministry for Environment has provided a guidance document for Regional and Unitary authorities on the 17th May 2023 which indicated that the Otago region will be "turned on" by way of OIC on the 1st of February 2024 (Appendix 1).
- FWFP Regulations must be "turned on" across the region no later than 31 December 2025.
- FWFP submission timeframe will be 18 months from when a sub-regional area is "turned on".
- FWFPs need to be geographically phased over six-month intervals.

Design principles:

- Will take into account mana whenua input into the phasing.
- Supports farmers undertaking Intensive Winter Grazing (IWG).
- Provides for scaling of resources to meet demand.
- Phasing will be easy to communicate/understand.

- Recognises relative differences in the sectors.
- Considers industry and catchment group support in areas across Otago.

[19] An internal working group (Freshwater Farm Plan Team) has been set up which includes staff representatives from Regulatory, Operations, Corporate Services and Policy and Science directorates as well as representatives from Aukaha and Te Ao Marama. The role of the Freshwater Farm Plan Team is as follows:

- To prepare for the roll out of Freshwater Farm Plans (FWFPs) in Otago.
- To provide recommendations to ELT and Council around the preferred roll out of FWFPs in Otago.
- To identify any risks arise that are likely to affect delivery FWFPs in Otago.
- To provide input into the development of an implementation plan for FWFPs.
- To ensure effective implementation of the FWFP programme in Otago.
- Ensure integration between FWFPs and LWRP.
- Ensure that delivery is integrated into business as usual. Once full integration has occurred the group will no longer be required.

[20] Engagement with mana whenua has commenced and is ongoing through Aukaha and Te Ao Marama.

[21] Aukaha and Te Ao Marama have advised that kā rūnaka and are supportive of the proposed roll out in Table 1 below.

[22] In order to develop suggested sequencing for rollout in Otago, staff have considered the below factors which have informed the recommendation below:

- Likely work flows for certifiers/auditors
- Number of farmers in areas across Otago
- ORC capacity to support and prepare farmers for what is coming
- Geographical split
- Level of community engagement
- Water quality risks
- Location of dairy farms and intensive winter grazing
- Catchment Group ability to support
- Industry group ability to support

[23] The Otago region has been split into five Freshwater Management Units (FMUs) under the requirements in the National Policy Statement for Freshwater 2014. The Clutha/Mata-au FMU has also been split into rohe (Upper Lakes, Dunstan, Manuherekia, Roxburgh, Lower Clutha) (Figure 1). Staff suggest utilising the FMUs and rohe for the sequenced roll out across the region. This is the draft rollout order that has been provided to MFE, that endorsement from Council is sought for.

[24] Table 1 includes the proposed phasing order for Otago.

Table 1: Proposed phasing order for Otago

Order	Catchment	Commencement date	Anticipated Number of farms	Approximate area to be covered by FWFPs (hectares)*
1	North Otago FMU	February 2024	756	265,264.22
2	Lower Clutha rohe	August 2024	821	337,327.65
3	Rest Clutha FMU (Upper Lakes, Dunstan, Manuherekia, Roxburgh)	February 2025	913	1,033,254.2
4	Taieri FMU	August 2025	520	484,742.14
4	Catlins FMU	August 2025	185	83,944.39
5	Dunedin and Coast FMU	December 2025	342	86,338.81

*note that some of these measurements cover farms which are across FMU boundaries and incorporate parts of farms.

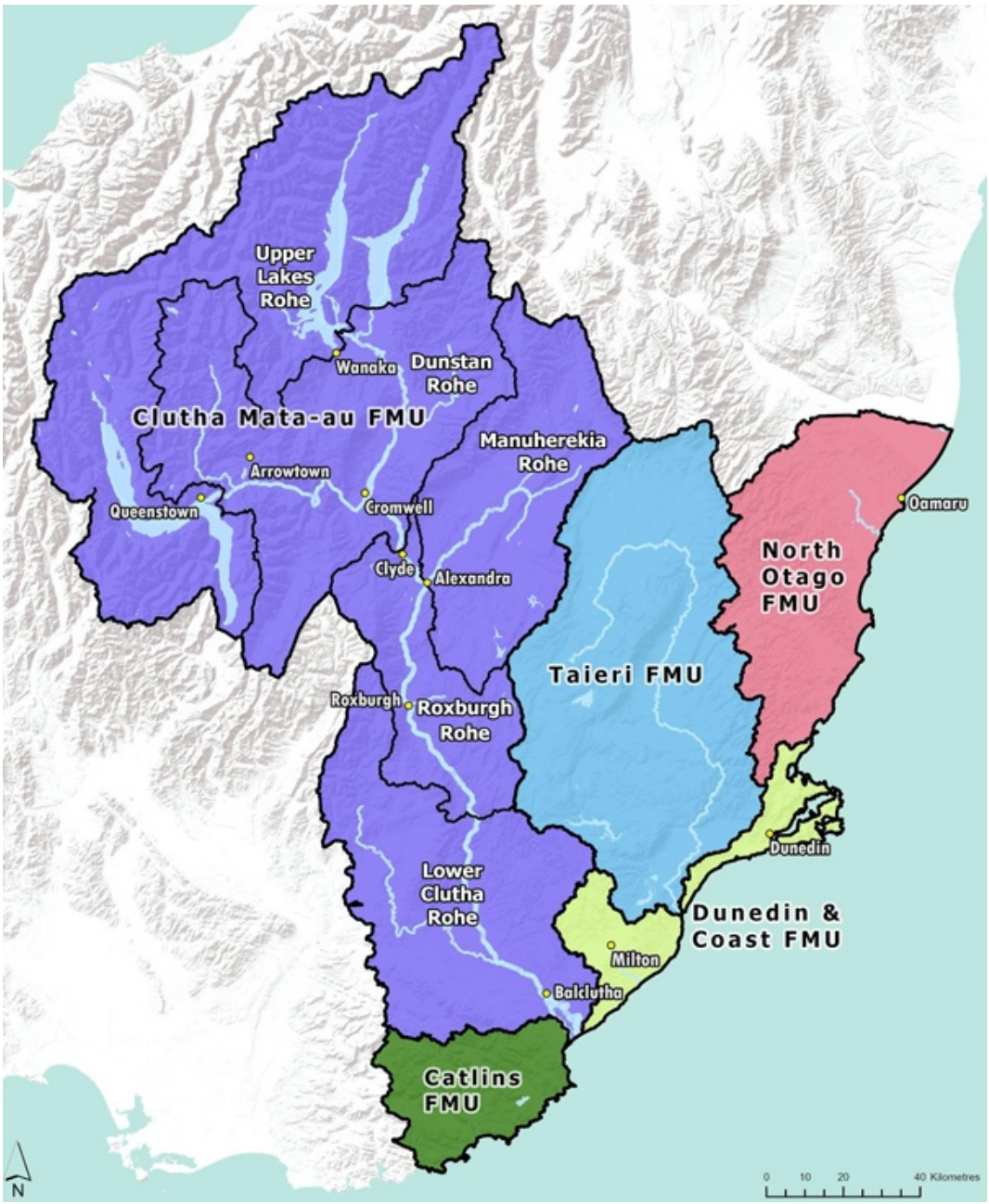


Figure 1: Freshwater management Units (FMUs) and rohe areas for Otago.

[25] The following summarises the rationale for this sequencing recommendation:

a) <u>Provides increased options for farmers undertaking IWG</u>
Intensive Winter Grazing activities are concentrated in the North Otago, Catlins, Lower Clutha and Taieri FMUs. The Phasing provides alignment with those areas and options for those farmers who cannot meet the relevant standards for IWG and would prefer to manage that activity through a FWFP. It also aligns with the timeframes for a number of resource consents that are in place.

b) <u>Scales with time to support resourcing</u>

The phasing results in a gradual increase in estimated FWFP's for certification over the course of the initial 2 years, before dropping off over the following 2-3 years. This will better support the scaling of resources (Council, sector, accredited certifiers, and auditors), whilst recognising that the demand for certifiers in other regions might not align with Otago, and that some may also choose to provide audit services.

It is anticipated that there may be some delays to certification that occur due to these regulations being new to the community and a possible lack of supply of certifiers. A staged roll-out will support ongoing demand for certification beyond that initial period shown. The staged roll out across the region will ensure that there is availability and capacity of staff to support farmers on their farm planning journey.

c) Is easily understood by farmers

The phasing relies on an FMU/rohe based roll-out with these areas being the ones used through the Land and Water Plan. The FMU's/rohe have been socialised with the community and will be an approach that is recognisable. We do appreciate that many farmers (particularly drystock) tend to relate better to more localised sub-catchments, which may still be a focus of engagement activities. However, grouping them into their requisite FMUs will support more efficient engagement and clear messaging with farmers.

There is currently work that is being progressed with significant engagement around water quality though the Toitū Te Hakapupu project being delivered in the Pleasant River catchment, which is located in the North Otago FMU. The engagement with farmers in this catchment will assist in their understanding around freshwater and hopefully support the uptake of FWFPs in this area where there are sheep, beef and deer farmers located.

d) Is more sensitive to sector needs

In general terms, dairy farmers have had greater exposure to the concept of farm planning than those in other sectors. Farmers in the dairy sector have largely begun their farm planning journey and are well supported by sector/industry representatives. It follows that the drystock sector is comparatively less ready, and will likely be the focus of support and engagement activities.

Unsurprisingly, the sector distribution across the region is not even, although in North Otago and Lower Clutha there are higher numbers of dairy farms than other areas.

e) Water Quality

Water quality in the North Otago FMU shows some degradation. There is pressure from land use and, at times, from low flows. Rivers with high water abstraction rates have less capacity to dilute and flush contaminants, resulting in greater impact on river ecosystems.

Fourteen of sixteen sites monitored by ORC did not meet the required standard for at least one measurement. Issues identified in this FMU relate to elevated phosphorus, E. coli (faecal indicator bacteria), nitrogen, turbidity and aquatic insect life is generally less than pristine.

Trend analysis for the North Otago FMU rivers showed some degradation at most sites, with many declining trends appearing in both the 20-year and 10-year analysis periods.

The North Otago FMU contains several different aquifer types, including confined, unconfined, and alluvial ribbons. Unconfined, shallow aquifers within this FMU include the lower Waitaki Plains aquifer, the Kauru-Kakanui Alluvial Ribbon aquifer, and the Shag Alluvial aquifer.

f) Mana whenua support

Mana whenua have indicated their general support for a phased rollout of the FWFPs throughout Otago. They are supportive of North Otago going first as Te rūnanga o Moeraki already has experience with farm plans and has a high level of interest and preparedness to be involved with the FWFP processes. Hokonui Rūnanga has requested that the Catlins area roll-out be staged in 2025 to avoid coinciding with the Mataura roll-out in Southland in late 2024, which Hokonui Rūnanga will also be involved with. Ōtākou runaka have also indicated that they would like to see the Taiari FMU ahead of Dunedin and Coast in terms of priorities.

g) Land and Water Plan for Otago

The proposed Land and Water Regional Plan (pLWRP) must be notified by 30 June 2024. The pLWRP and FWFPs will work in tandem to deliver water quality improvements in the region. It is anticipated that the pLWRP will set out outcomes and standards to be incorporated in the catchment context, and it may also include other requirements relating to the development and certification of FWFPs.

h) Ability to prepare Catchment Context

The development of CCCV across the region will need to occur in stages until December 2025 to align with the proposed roll-out as detailed in Table 1. ORC have a good level of existing information for each at the FMU/rohe scale so it makes sense to retain this geographic level for the rollout as recommended in Table 1. It is important to note that the CCCV will be able to be updated over time.

i) Links to other work programmes

The Integrated Catchment Management (ICM) work programme is ongoing and the pilot area for Catchment Action Plan (CAP) development is in the Catlins. Information that is developed alongside mana whenua and communities as part of this process will be able to be incorporated into the CCCV once the CAPs are completed. In some instances the proposed roll out will align with the development of CAPs such as for the Catlins. For other areas which do not initially align the CCCV will be able to be updated to incorporate this information and farmers will be able to use this in the next iteration of their FWFPs.

j) Catchment group support

The Otago region is supported very well by 24 catchment groups plus another 26 pod groups which are active under the catchment groups. Conversations have occurred with Otago Catchments Community around catchment group support across the region. They have assisted in identifying that the North Otago FMU is

well supported by active and collaborative catchment groups. These catchment groups have good existing infrastructure which will be able to support their farmers on the farm planning journey. It was identified that the Dunstan, Roxburgh, Catlins and Dunedin and Coast FMU/rohes have less support in regards to catchment groups which is likely to develop over the coming years. The remaining geographic areas having some support for farmers. North Otago is a whole geographic area which is well supported.

OPTIONS

[26] Option 1: Endorse the recommended phased roll out as per table 1 within this paper.

[27] Option 2: Provide an alternative phased rollout for Otago for staff to provide to MFE.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[28] The FWFP programme is consistent with the ORC Strategic framework. This includes supporting our vision for Otago including:

- An environment that supports healthy people and ecosystems
- A sustainable way of life for everyone in Otago
- Te Ao Māori and Mātauranga Kāi Tahu are embedded in Otago communities

[29] The programme once we are in the implementation phase will deliver on a number of commitments made in the strategic directions including:

- Effectively engaging communities
- Collaborating to deliver
- Mātauranga Kāi Tahu is an integral part of our decision-making
- Focus on Community Needs

Financial Considerations

[30] Operational costs will apply to Council in the roll-out of FWFPs across the region. Initially this is in the development of the CCCV and any training Council provides to certifiers and auditors. Currently across the organisation there is 1 FTE set aside for this work. Resource will be required to develop CCCV across the region and to engage with communities and industry across Otago around what FWFPs mean for them. Further financial consideration will be required and will occur through the LTP process which will be further understood once ORC develop a detailed implementation plan to support the rollout.

Significance and Engagement Considerations

[31] The implementation of Freshwater Farm Plans throughout Otago will involve ongoing partnership with mana whenua as well as engagement with key stakeholders, industry and communities.

Legislative and Risk Considerations

[32] Freshwater Farm Plans (FWFPs) are a legal instrument established under Part 9A of the RMA (sections 217A to 217M). Council must implement this legislation.

Climate Change Considerations

[33] Not applicable

Communications Considerations

[34] Communications are being led at the national level and Te Uru Kahika (Regional Council Sector Group) and MfE have provided support to Councils in this regard. ORC will be able to utilise this support through a package of work which provides guidance and tools for local media initiatives and to assist with answering questions from the public. Where appropriate materials will be tailored to the Otago region and a communications plan will be developed as part of the implementation plan.

NEXT STEPS

[35] Ongoing engagement with Aukaha and Te Ao Marama regarding Freshwater Farm Plans

[36] Staff will make contact with MfE to provide the finalised phased roll-out for Otago to contribute to the OIC. This is due by the 28th June 2023.

[37] Staff will commence the development of an implementation plan for FWFP's and development of the CCCV for the first area for the phased roll-out once endorsed by Council.

[38] Staff will prepare a paper which incorporates the implementation plan for FWFPs and will bring this back to Council as an update in a future meeting.

ATTACHMENTS

Nil

8.2. Integrated Catchment Management Catlins Integrated Catchment Group Terms of Reference

Prepared for:	Council
Report No.	OPS2307
Activity:	Governance Report
Author:	Anna Molloy, Principal Advisor Environmental Implementation; Libby Caldwell, Manager Environmental Implementation
Endorsed by:	Gavin Palmer, General Manager Operations
Date:	1 June 2023

PURPOSE

[1] To provide an update to Council on the progress on the Integrated Catchment Management (ICM) Programme including seeking approval for a proposed Terms of Reference for the Catlins Integrated Catchment Group (ICG).

EXECUTIVE SUMMARY

[2] The ICM Programme update encompasses:

a. The ICM Working Group tasks – the working group provide valuable input to the development and evolution of the ICM Programme. Their work is on track.
b. Establishing the Catlins Integrated Catchment Group (ICG) – It is proposed that this is initiated through a community hui and call for expressions of interest. The ICG would operate as per a terms of reference.
c. Supporting catchment groups (sub FMU/rohe scale) with integrated catchment action planning – through additional resources from Ministry for Environment.
d. rollout of Catchment Action Plans across Otago – being developed.

[3] An update on these is described in more detail below.

[4] A Terms of Reference for the proposed Catlins ICG has been drafted and attached for endorsement and/or amendment by Council. This Terms of Reference documents the purpose of the CICG and its role in developing a CAP for the Catlins.

RECOMMENDATION

That the Council*:*

1) ***Notes*** *this report.*
2) ***Approves*** *the proposed Terms of Reference for the Catlins Integrated Catchment Group.*

BACKGROUND

[5] Council has been supportive of an Integrated Catchment Management (ICM) approach since its first introduction in a Council workshop in October 2020. This support was formalised through the adoption of the Long-term Plan 2021-31 (LTP) in June 2021 which includes the performance measure: Lead the development, implementation, and review of integrated Catchment Plans (ICP) in collaboration with iwi and community.

[6] Development of an ICM Programme has been underway since December 2021, including how Catchment Action Plans (CAPs) can be developed in collaboration with iwi and the community. The ICM Programme is based on developing one CAP for each FMU or rohe.

[7] At the 10 August 2022 Strategy and Planning Committee, Committee members endorsed a series of recommendations regarding a path forward for designing and implementing and ICM Programme. This included:

a. Endorsing the Catlins freshwater management unit (FMU) as the pilot for developing a CAP
b. Establishing an ICM Working Group (ICMWG) to oversee the development of CAPs and the ICM programme (initial tasks are outlined in Table 1 below).

[8] At the 28 September 2022 Council meeting, Council endorsed the Terms of Reference for the ICMWG whose purpose is to establish the 'groundwork' upon which the pilot CAP will be developed, including who, how and what will be developed. The working group began meeting in February 2023. Members of the Working Group are:

a. Cr Lloyd McCall – Chair
b. Cr Kate Wilson
c. Robyn Shanks – Catlins Coast Inc
d. Rachel Napier – Owaka Catchment Group
e. Simon O'Meara – Otago Catchment Community
f. Sandra McIntyre – Aukaha
g. Maria Bartlett – Te Ao Marama
h. ORC Manager Operations
i. ORC Manager Strategy
j. ORC Team Leader Land and Freshwater

DISCUSSION

ICM Working Group Tasks

[9] An update on the activities of the ICM Working Group is provided in Table 1 below. The tasks are taken from those endorsed by the 10 August 2022 Strategy and Planning Committee.

Category	Task	Update	Next steps
ICM Working Group (ICM-WG)	Establish an ICM Working Group (ICM-WG)	There have been 6 (as of 27 June 2023) meetings of the ICMWG since the first meeting on 1 February 2023.	Continue monthly meetings
ICM-WG Tasks	Stocktake current and planned iwi, catchment and community group and ORC initiatives	A stocktake for the Catlins has been completed and shared with the ICM-WG for comment. This stocktake will form the basis of background information for the Catlins CAP.	Continue to build on the stocktake and map activities as required.
	Develop a community collaboration plan for ICM and CAP co-design	A presentation proposing the Conservation Standards (CS) as the co-design system was presented to the ICM-WG's March meeting and endorsed by the working group. "Conservation Standards (Open Standards for the Practice of Conservation) is a proven approach in delivering outcomes and impacts, while navigating complex	Use Conservation Standards approach for co-design workshops for a CAP in the Catlins Pilot

		processes and situations. Whilst it is called the Conservation Standards, it is an outcome planning framework which can be applied to improve cultural, social, economic, and environmental outcomes using existing tools and methodologies. This process facilitates integrated planning and can deliver on multiple wellbeing in a holistic way."	
	Develop detail around the community reference group concept, including terms of reference, appointment process and resourcing.	A discussion paper proposing setting up a collaborative group (Catlins Integrated Catchment Group or CICG) to co-develop the CAP was presented to the ICM-WG's March meeting and endorsed. The Terms of Reference for the CICG were endorsed by the ICM-WG's 1 May meeting. The appointment process will be via expressions of interest and recommendation back to Council for appointment. The Terms of Reference outline the diversity and range of experience being sought. Resourcing (including remuneration) for the ICG is being developed through the ELT.	Seek Council endorsement of the CICG Terms of Reference – refer to **Attachment 1.**
	Develop a process for CAP development including: i. at what point community collaboration (co-design) should begin ii. how to collate and incorporate relevant knowledge, data, activities, plans and strategies including citizen science, iii. a revised programme logic (if appropriate) as a conceptual basis and communication tool for CAP development, iv. a multi-criteria analysis framework for prioritising key actions within CAPs which can be tailored by each CAP collaboration group as required,	The CAP development process will involve the ICG and the use of Conservation Standards process outlined above. ICM Programme Systems (project management, spatial information and analysis, and reporting) are being developed. Specifically, to the sub points: i. If Council endorses the CICG Terms of Reference, the CICG will be set up following the timeline outlined below ii. Relevant data and mapping is being collated (as well as the stocktake of activities). The CAP development approach will incorporate this knowledge (including mātauraka Māori as appropriate). iii. A revised programme logic is not necessary as the conservation standards approach (which is based on programme logic for achieving outcomes) and supporting project management tool provides a good basis for communicating the CAP concept. iv. Criteria and data to support	Continue to develop the CAP process, including spatial systems and analysis to support the development of Catlins Pilot CAP.

		prioritisation will continue to be developed and collated. The CS approach includes a level of prioritisation / targeting of activities. However, this can be complemented by best practice criteria for decision making once actions are determined.	
	Develop a communications plan for ICM and CAPs based on the community collaboration plan and the CAP development process	A draft communications plan was presented to the ICM-WG's 1 May meeting. The key messages were discussed and endorsed with changes.	Incorporate the ICM-WG's comments and implement.
	Begin implementation of the community collaboration plan and CAP development process where actions do not require further approval of Council.	If the CICG Terms of Refence are endorsed by Council, a timeframe for CAP development is outlines below	See timeframe below

Establishing the Catlins ICG

[10] The ICMWG's May 2023 meeting endorsed the Terms of Reference for the formation of the Catlins Integrated Catchment Group (CICG) as the appropriate collaborative platform for the CAP development. The Terms of Reference are at Attachment 1.

[11] The proposed timeline for the Catlins ICG establishment and CAP Pilot is as follows:

a. 18 July 2023 – ICM Working Group to host a hui at Owaka to introduce ICM and the CAP co-development process and generate interest in joining the ICG.
b. July – August 2023 – open call for expressions of interest (EOIs)for membership on the Catlins ICG, and direct invitations to identified organisations.
c. August 2023 – collate and assess EOIs with ICM Working Group making recommendations to Council
d. September 2023 – Council appoint Catlins ICG members
e. October 2023– First meeting of Catlins ICG held
f. October – September 2024 – Catlins ICG develops a CAP through facilitated workshops (note: this timeframe is an estimate, given this is a pilot it could take longer or less time).

Supporting Catchment Groups with ICM

[12] Resources for the ICM Programme are increasing in 2023/24, including a Catchment Group Planner role funded from the Ministry for Environment (MfE) to support catchment groups to develop integrated catchment action plans.

[13] The Catchment Group Planner enables ORC to facilitate development of CAPs at scale with groups who are interested. This will help groups and at the same time ensure a consistent approach to catchment action planning which makes it easier to align planning when the ICM Programme rolls out in FMUs / rohe.

[14] This position has been recruited and starts in early July. Interest in support to develop a smaller scale CAP has already been received from the Lake Hawea Stakeholder Group.

CAP Rollout

[15] Work is underway for establishing a schedule for rolling out CAPs across Otago. This work will come to Council via the Environmental Implementation Committee in August 2023.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[16] The ICM Programme is a significant new approach for ORC. It is implementing the commitment of Strategic Directions to deliver integrated environmental management through and ICM approach.

[17] Consideration has been given to the timing of the Catlins hui and the proposed Land and Water Regional Plan consultation round 3. Both processes are operating in close collaboration and will ensure clear and consistent messaging is used to define the differences and links between them.

Financial Considerations

[18] Any costs incurred in establishing and coordinating the ICM Working Group and the proposed Catlins ICG will be covered through the ICM Budget.

Significance and Engagement Considerations

[19] Consideration of community and mana whenua information needs and availability for the hui and ongoing involvement in the ICG has been discussed through the ICM Working Group, which includes representative from Aukaha and Te Ao Marama.

Legislative and Risk Considerations

[20] There are no legislative requirements that need to be considered at this stage.

Climate Change Considerations

[21] There are no immediate climate change considerations for this work.

Communications Considerations

[22] The ICM Team have been working in collaboration with ORC Communications Team for both the Communications Plan and the planning around the Catlins hui.

[23] A communications plan has been drafted and is being implemented.

NEXT STEPS

[24] If approved, the Terms of Reference will be used as the basis for establishing a Catlins ICG to co-design the Pilot CAP. This will start with a community hui on 18th July 2023.

ATTACHMENTS

1. Attachment 1 Catlins ICG Terms of Reference [**8.2.1** - 5 pages]

CATLINS INTEGRATED CATCHMENT GROUP
DRAFT TERMS OF REFERENCE

1. PURPOSE OF THE CATLINS INTEGRATED CATCHMENT GROUP

The Catlins Integrated Catchment Group (CICG) is being formed to collaboratively develop a Catchment Action Plan (CAP) for the Catlins Freshwater Management Unit (FMU). The Catlins FMU is shown in FigureFigure 1.

The CICG will make effective recommendations to Council for endorsement. It is not a delegated decision-making body of the Council nor is it a committee under the Local Government Act 2002.

The formation of the CICG represents the ORC's commitment to working in partnership with iwi, the community and with stakeholders to co-design the CAPs. The primary focus of the CICG is to develop a CAP that builds on the strong foundation of work and engagement that is already happening in the Catlins and develop a vision that meets the aspirations of the Catlins community. The vision will be for the entire catchment (including the land, biodiversity, estuarine and marine habitats) and will therefore be broader than the freshwater vision in the Regional Policy Statement, but consistent with the RPS vison. The group will need an understanding of the environment, socio-economic values and the ability to incorporate the deep connections that mana whenua have to the land.

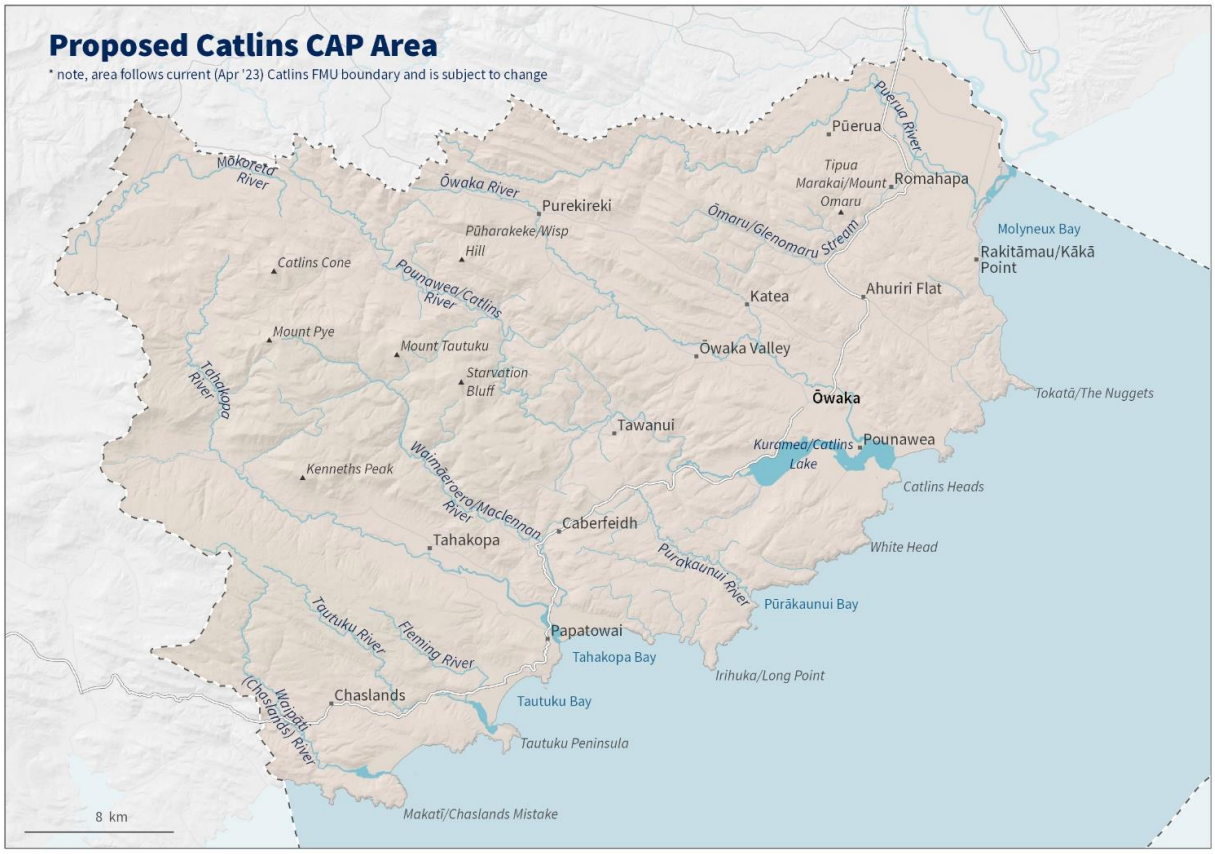


Figure 1. Proposed Catlins CAP Area

Document Version: 1.0
Draft date: 1 May 2023

2. WHAT IS A CATCHMENT ACTION PLAN?

A Catchment Action Plan (CAP) is a non-regulatory (or voluntary) plan for the management and conservation of an entire catchment(s). It consolidates and builds on actions that are already taking place in the catchment and can serve as a focus for new actions and projects. Although the catchment, or watershed, is the unit of area used to design a CAP, the actions described in the CAP can cover areas other than freshwater including terrestrial, estuarine, and marine ecosystems, land and soils, and human values (including mahika kai and wāhi tūpuna values). The CAP can also refer to regulatory (or mandatory) actions that may need to be taken to achieve environmental outcomes required by legislation (such as regional plans). The Catchment Action Plan must be consistent with the relevant statutory requirements.

Successful CAPs are designed by iwi, the community, and stakeholders for their place. They are supported in this work by the ORC, government, territorial authorities, and subject experts.

The CAP will need to be endorsed by Otago Regional Council but is not limited to matters covered by Council.

3. RESPONSIBILITIES OF THE CATLINS INTEGRATED CATCHMENT GROUP

The CICG is responsible for co-developing the CAP for the Catlins FMU. This work will include:

- Committing time and effort to attend and participate in monthly meetings (including 4-5 CAP co-design workshops) for the duration of the CICG.
- Coming to the meetings and workshops prepared, making sure to have studied all the background material provided.
- Bringing their knowledge and experience to the work.
- Being an ambassador for the CAP within the community or their organisation.

The CICG members are not responsible for organising or carrying out the actions suggested in the CAP. The CICG may continue into the implementation phase of the CAP, however this will be determined at the completion of the CAP.

4. MEMBERSHIP OF THE CATLINS INTEGRATED CATCHMENT GROUP

Members of the Catlins Integrated Catchment Group will consist of up to 15 members who will be appointed by the ORC, on recommendation of the ICM Working Group.

Composition of the CICG

The CICG is a Catlins-based group that aims to have a predominance of its participants “local or connected” to the Catlins.

Diversity

Furthermore, it will aim to include diversity in terms of:

- geographical representation of the region
- communities of interest
- age and gender.

Experience and knowledge for the CICG

Members of the CICG will be sought on their experience, knowledge and understanding of issues and activities within the Catlins that allows them to contribute to the CAP co-design process.

CICG will aim to cover a range of experience and knowledge including:

- Environmental management – conservation, restoration, rehabilitation, planning or legislation
- Biodiversity – flora and fauna species, populations, or communities within the Catlins
- Freshwater – hydrology, quality, aquatic species, processes
- Estuaries and/ or marine ecosystems – processes, species
- Land and soils management – health, productivity, rehabilitation, stabilisation
- Historic heritage
- Mātauraka Māori
- Community and networks in the Catlins area
- Socio-economic assessment or evaluation – e.g. social science, economics background
- Agricultural systems
- Forestry practices
- Tourism (relevant to the Catlins)
- Government processes and practices – local, regional and/ or national.

Note: the group will be able to call on technical expertise, so CICG members do not need to be experts in all these areas.

Practical Criteria

Members of the CICG will also be selected on their capability to contribute successfully to the CAP co-design process. They will be a person who is:

- Able to explain their views clearly and listens to other people
- Able to seek common ground and focus on solutions
- Able to commit to participate in monthly meetings (including 4-5 workshops)
- Constructive and practical
- Open to different viewpoints
- Able to consider and contribute to discussions.

Tangata Whenua

There are defined roles for tangata whenua on the CICG to reflect the principles of the Treaty of Waitangi. Representation on the group will reflect connections to the Catlins. Representation for Papatipu Rūnaka and subsequent appointment of members will be determined by those Rūnaka with interests in the area. A representative of beneficial owners of Māori land may be appointed in addition to this.

Defined roles for tangata whenua does not preclude individuals who are tangata whenua being appointed in a non-defined role.

Government

There are also defined roles for ORC, as the facilitating organisation and regulatory authority and LINZ and DOC as significant government landowners in the Catlins.

5. GENERAL

Chairperson

A chairperson for the CICG will be appointed by CICG members at the first meeting. The Chairperson will be the primary spokesperson for the group including with the ICM-WG chairperson, the ORC's ICM staff and the media.

The role of the Chairperson is to:

- Motivate and lead the CICG to achieve its objectives and deliverables within the agreed timeframes
- Ensure a fair and equitable group process
- Foster an atmosphere of enquiry, respect, open-mindedness, and group learning
- Identify risks and work with the ORC's ICM staff to mitigate risks and issues as they arise in a timely and outcome focused manner
- Ensure the CICG members operate within the Terms of Reference.

Media

The group will determine who should speak to the media or what communications will be published. This process will be supported by the ORC's Communications Team.

Term of appointment to the CICG

The work will begin on appointment of members. At the conclusion of the development of the CAP, the Group will be asked to make a recommendation for ongoing implementation to the ORC. The ORC will determine if the CICG will continue with the implementation and coordination of the CAP.

Quorum

Ideally CICG participants can attend all meetings and workshops which will be organised to suit the majority of members. However, a quorum of minimum two-thirds members must be present (online or in person) to run a meeting / workshop.

Non-attendance and vacancies

If a CICG member or their alternate does not attend three meetings in a row, they may be replaced. If this occurs, or if there are other vacancies on the group, these will be referred to the ICM Working Group who will recommend appointments to the ORC as replacements.

Alternates and additional participants

If a participant who is representing an organisation or is chosen by iwi is unable to attend, they can send an alternate to ensure that this expertise is present in the room. If an alternate is being proposed, this should be advised as early as possible.

It may be appropriate for additional participants to be present for CAP development workshops. This can be decided by a consensus decision of the CICG. However, additional participants will not have decision making or voting rights.

Decision Making
Decisions will be made by consensus where possible. A vote can be called by the group where consensus is not reached. In the event of a tied vote, the matter will be further discussed until consensus can be reached.

Dispute Resolution
Disputes will be referred to the ICM Working Group for resolution.

6. CAP DEVELOPMENT WORKSHOPS

The CICG will be using an internationally recognised method for biodiversity and resource conservation project design and collaboration called Conservation Standards (CS). CS has been designed to tackle large, complex, and urgent environmental problems and places the community and principles of co-design at its heart. The CS co-design process takes place over 4-5 staged and facilitated full-day workshops where the community and experts collaborate to design their project. The CICG will be facilitated and supported by technical expertise from the ORC.

It is important that all members participate in all workshops wherever possible.

7. REMUNERATION GUIDELINES

To be confirmed.

8.3. Further policy guidance from the Governance Group for developing the Land and Water Regional Plan

Prepared for:	Council
Report No.	POL2303
Activity:	Environmental: Water Regulatory: Policy Development
Author:	Tom de Pelsemaeker, Team Leader, Land & Water Fleur Matthews, Manager, Policy & Planning
Endorsed by:	Anita Dawe, General Manager Policy and Science
Date:	28 June 2023

PURPOSE

[1] The purpose of this paper is to provide the Otago Regional Council with a summary of the feedback and policy guidance on regionwide issues obtained from Councillors and Iwi representatives during Governance Group (GG) meetings and Environmental Science and Policy (ESP) Committee workshop. This feedback and policy guidance will inform the development of the proposed Land and Water Regional Plan (pLWRP).

EXECUTIVE SUMMARY

[2] Policy guidance from Councillors and Iwi representatives on management approaches for addressing resource management issues in Otago forms an important input for the development of regionwide provisions in the pLWRP.

[3] Policy guidance on most issues was provided in the previous triennium. However, as work on the pLWRP has been progressing in recent months, staff have identified the need for further policy guidance from Councillors and Iwi representatives on:

a. setting take limits and environmental flows for rivers
b. phasing out over-allocation
c. setting take limits and environmental levels for lakes
d. developing interim target attribute states
e. managing key contaminant discharges associated with farming activities and practices
f. managing plantation forestry and carbon forestry

[4] These topics were discussed with the GG during their meetings on 6 April and 8 May 2023, and during a workshop of the ESP Committee on 24 May 2023.

[5] This report sets out the policy guidance received from Councillors and Iwi representatives on the aforementioned topics during the GG group meetings and ESP Committee workshop.

RECOMMENDATION

That the Council*:*

1) ***Notes*** *this report.*

2) ***Notes*** the policy guidance received by the Governance Group and the Environmental Science and Policy Committee for:
   a) setting of take limits and environmental flows for rivers
   b) phasing out of over-allocation
   c) setting of take limits and environmental levels for lakes
   d) developing interim target attribute states
   e) managing key contaminant discharges associated with farming activities and practices
   f) managing plantation forestry and carbon forestry

BACKGROUND

[6] Over the period September 2021 to April 2022, ORC Policy staff held a series of workshops for the Strategy and Planning Committee (the predecessor of the current ESP Committee) on a range of regionwide issues and topics and collected written feedback on these matters.

[7] ORC staff then presented two papers to the Strategy and Planning Committee in July 2022 (Report No. SPS2227[1]) and August 2022 (Report No. SPS2235[2]). These papers had two purposes – the first was to summarise the feedback and policy guidance on regionwide issues obtained during these workshops, and the second was seeking endorsement of the policy guidance for a number of regionwide issues.

[8] As work on the pLWRP has been progressing in recent months, staff have identified the need for further policy guidance from Councillors and Iwi representatives on:
1. setting take limits and environmental flows for rivers
2. phasing out over-allocation
3. setting take limits and environmental levels for lakes
4. developing interim target attribute states
5. managing key contaminant discharges associated with farming activities and practices
6. managing plantation forestry and carbon forestry
7. managing gravel extraction
8. providing for the protection of drinking water supplies

[9] Topics 1 to 6 were discussed with the GG during their meetings on 6 April and 8 May 2023, and during a workshop of the ESP Committee on 24 May 2023. Background papers relevant to topics 1 to 6 were sent to the ESP Committee on 18 May. These background papers are attached to this report as Attachments 1 to 8.

[10] Topics 7 and 8 were discussed with the GG during their meeting on 8 June 2023 and will be workshopped by the ESP Committee on 29 June 2023. A paper seeking confirmation on the policy direction provided by the GG and the ESP Committee will be presented to Council in the July Council meeting.

DISCUSSION

[11] The tables below summarise the feedback received from the Governance Group and the ESP Committee on topics 1 to 6.

[1] https://www.orc.govt.nz/media/12595/agenda-strategy-and-planning-20220713.pdf
[2] https://www.orc.govt.nz/media/12701/agenda-strategy-and-planning-20220810.pdf

Topic 1: Approach for setting take limits and environmental flows for rivers	
Governance Group feedback	ESP Committee feedback
• General support for applying: ➢ a principle-based approach for setting 'bespoke' take limits and environmental flows in complex catchments (i.e. catchments with a high degree of hydrological alteration); ➢ default take limits and environmental flows based on the Hayes *et al.* 2020 guidelines as a narrative limit (e.g. as a % of MALF) elsewhere.[3] • Need for clear messaging around this approach during the FMU engagement to provide certainty to landholders and communities.	• General support for the policy guidance provided by the GG. • Need for clear communication with communities around the scientific basis for setting these limits and the degree to which these limits are resilient to climate change impacts.

Topic 2: Approach for phasing out of over-allocation	
Governance Group feedback	ESP Committee feedback
• General support for: ➢ a 2-stage approach that provides for transition planning (stage 1) and coordinated implementation of environmental flows and take limits (stage 2) ➢ the use of common catchment expiry dates for consents ➢ some flexibility around the use of tools to phase out over-allocation • Recognition that the pLWRP should limit the ability to grant longer terms in degraded/ over-allocated catchments, but different views on the duration of consent term. • The pLWRP should enable, rather than prescribe alternative land uses that are less water dependent. • No direction was provided on whether the pLWRP should exempt certain uses from the requirement to reduce allocation.	• General support for the policy guidance provided by the GG. • Need for clear communication with communities around how over-allocated catchments are defined and identified. • Regarding prioritising certain uses when phasing out over-allocation feedback included: ➢ Prioritise uses of water that benefit local communities over those that benefit people and businesses outside local communities ➢ Uses must be prioritised in accordance with higher order planning instruments, incl. the National Policy Statement for Freshwater Management (NPS-FM) ➢ Uses with greater economic benefit should be prioritised over those with little economic benefit ➢ Provide flexibility by allowing for voluntary actions to occur in the phasing out of over-allocation.

[3] The default take limits and environmental flows are shown in the background paper in Attachment 1.

Topic 3: Approach for setting of take limits and environmental levels for lakes	
Governance Group feedback	ESP Committee feedback
• General support for: ➢ considering the wider river system when setting take limits and environmental levels for lakes ➢ providing protection for natural lakes and limiting the opportunities for water taking from these lakes ➢ signalling in the pLWRP that there is need to develop a better understanding of lake hydrology • Where lake levels and limits already exist (including where these are set through consent conditions), provide for review of these levels by a set date	• General support for the policy guidance provided by the GG • Need to ensure different values supported by lakes are considered when setting take limits and levels for different types of lakes • Some support for using consent reviews on existing consents, although acknowledgement that there is a need to understand the consequences or effects of any changes to existing levels, particularly when dealing with existing infrastructure and consents as well as requirements under National Policy Statement for Renewable Energy Generation (NPS-REG)

Topic 4: Setting interim target attribute states (TAS)	
Governance Group feedback	ESP Committee feedback
• General agreement with suggested approach for setting interim TAS (as set out in the background papers in Attachment 1) • Interim TAS need to: ➢ be aspirational, yet achievable ➢ recognise the natural state of water bodies ➢ be set with a climate change lens	• General support for the policy guidance provided by the GG • Concern raised around the long timelines for achieving environmental outcomes

Topic 5: Approach for managing key contaminant discharges associated with farming activities and practices	
Governance Group feedback	ESP Committee feedback
• General support for: ➢ a staged process and interim target attribute states that are aspirational, yet achievable in the lifetime of the plan (10 years) ➢ a suite of actions from GMP to GMP+ • Acceptable to have more stringent provisions in degraded catchments and near sensitive water bodies • Care needs to be taken where catchments are at or near the 'tipping point' • General support for all the proposed	• General support for the policy guidance provided by the GG, in particular, having a nuanced approach where more stringent provisions apply in catchments that are degraded or at risk

actions to be used in catchments where they are needed to achieve water quality outcomes • The pLWRP needs to: ➢ set a clear direction of travel with regards to improving water quality in the region ➢ provide for some forms of land use intensification/new opportunities where it can be proven that there will be no adverse effects on water quality • No clear direction regarding whether requirements for nutrient reductions should be applied only to activities that have been identified as being high risk (e.g. winter grazing, effluent storage and systems using high levels of inputs) or to all farming activities.	

Topic 6: Approach managing plantation forestry and carbon forestry	
Governance Group feedback	ESP Committee feedback
• General support for a more stringent management regime than the National Environmental Standard for Plantation Forestry (NES-PF). • The management regime in the pLWRP should: ➢ manage fire risk and density of planting ➢ provide for buffers from waterways and infrastructure ➢ consider the effects of plantation forestry on a range of matters including proliferation of pests, catchment hydrology and drinking water supplies ➢ encourage native forestry ➢ set the same standards for managing both plantation forestry and permanent forestry	• General support for the policy guidance provided by the GG • The management regime in the pLWRP should: ➢ manage effects of forest fire ash to (drinking) water quality ➢ make it harder to establish permanent forestry than plantation forestry ➢ differentiate between riparian planting and forestry ➢ include setbacks, as they are key for managing forestry ➢ protect native planting that already exists, including bush and tussocks

OPTIONS

[12] ORC staff require policy guidance on the above topics to continue with development of regionwide provisions for the pLWRP. ORC staff recommend that the Council notes the policy guidance provided by the Governance Group and the ESP Committee outlined in the tables under paragraph 11 of this report so that work can continue on the development of the pLWRP.

[13] The other option would be for Council to ask staff to revisit some or all of the policy guidance. The consequences of that would be further work and workshops. It would impact on the timeframes for:

- completing the draft plan provisions

- rolling out the next stage of community consultation; and ultimately
- the notification of the pLWRP

CONSIDERATIONS

Strategic Framework and Policy Considerations

[14] ORC is responsible for implementing new national direction and regulations, including by notifying new or updated regional policy statements and regional plans that set out how ORC will give effect to the relevant higher order documents. ORC has committed to a work programme with the Minister for the Environment which includes notifying a new pLWRP by 30 June 2024.

[15] The policy guidance provided by the GG and the ESP Committee is an important input in the development of the pLWRP and will enable it to be fit for purpose and give effect to the NPS-FM.

[16] The new pLWRP will contribute to fulfilling Council's objectives under ORC's Strategic Directions of leading environmental management in Otago, in partnership with mana whenua; promoting collaboration with territorial authorities and others to achieve resilient and sustainable communities; and promoting a healthy and resilient environment whose capacity for sustaining life and ecosystem heath is enhanced and sustained.

Financial Considerations

[17] The Policy Team administers existing budgets for the development of the pLWRP. Any expenditures associated with the development of the pLWRP are funded from these budgets.

[18] There are no direct financial implications on the existing budget flowing on from the policy guidance provided by the GG and ESP Committee or from adopting the staff recommendations with respect to the policy guidance for any outstanding regionwide issues.

Significance and Engagement Considerations

[19] This step in the development of the pLWRP does not trigger ORC's *He mahi rau rika: ORC Significance, Engagement and Māori Participation Policy*. If the policy guidance is confirmed, this policy guidance will be used for targeted consultation and engagement on the region wide provisions. This consultation and engagement is consistent with the requirements in the NPS-FM.

Legislative and Risk Considerations

[20] The development of a new pLWRP is a requirement of the NPS-FM. The pLWRP will be developed in accordance with the process and other requirements prescribed by the NPS-FM and the Resource Management Act 1991 (RMA).

[21] Consideration of policy guidance provided by Councillors and Iwi representatives in the development of the pLWRP assists with ensuring that community and mana whenua concerns and expectations are accurately captured and addressed and reduces the risk of delays in the timely notification of the pLWRP.

Climate Change Considerations

[22] Recognition of climate change and its effects on the health and wellbeing of the people and environment of Otago is one of the matters to which the pLWRP needs to respond in

order to give effect to the NPS-FM, in particular Policy 4: Freshwater is managed as part of New Zealand's integrated response to climate change.

[23] Previous workshops have considered climate change and how it may affect regionwide matters that will be addressed in the pLWRP.[4]

Communications Considerations

[24] There are no specific communications implications to be considered for this step in the development of the pLWRP. However, as work on the development of draft provisions is progressing, policy staff are working together with staff in the communications team to develop clear messages for the public around the different opportunities that exist for communities to have a say on the new pLWRP and when these opportunities for input will present themselves over the coming months.

NEXT STEPS

[25] ORC staff will use the policy guidance obtained from the GG and ESP Committee as an input in the development of the regionwide provisions for the pLWRP.

ATTACHMENTS

1. Attachment 1 Setting environmental limits for rivers in Otago [**8.3.1** - 7 pages]
2. Attachment 2 Phasing out over allocation [**8.3.2** - 11 pages]
3. Attachment 3 Setting environmental limits for lakes [**8.3.3** - 8 pages]
4. Attachment 4 Setting target and interim target attribute states [**8.3.4** - 3 pages]
5. Attachment 5 Appendix 1 Indicative Target Attribute States, Current States and Trends [**8.3.5** - 16 pages]
6. Attachment 6 Appendix 2 FMU and rohe water quality summaries [**8.3.6** - 3 pages]
7. Attachment 7 Managing discharges associated with farming activities [**8.3.7** - 9 pages]
8. Attachment 8 Management of plantation forestry and carbon forestry [**8.3.8** - 2 pages]

[4] See papers to the Strategy and Planning Committee in July and August 2022: Report No. SPS2227 and Report No. SPS2235.

ATTACHMENT 1

Land & Water Regional Plan Governance Group

Agenda item 2A: Methodology for setting environmental flows and take limits for rivers in Otago

Purpose of this paper

1. This is the first of three inter-related papers on water quantity that we are seeking Governance Group direction on. It is focused on the methods for setting environmental flows and take limits for rivers in Otago, which in turn relates to paper 2 which focuses on methods to phase out over-allocation and achieve these environmental flows and take limits. Paper 3 then focuses on methods for setting environmental levels and take limits for lakes.

2. The purpose of this paper is to outline the issues in relation to setting environmental flows and take limits for rivers in Otago in accordance with direction in higher order planning instruments and seek feedback from the Governance Group on suggested approaches.

Direction in higher order planning instruments

3. The National Policy Statement for Freshwater Management 2020 (NPS-FM)[1] requires that environmental flows and levels that will achieve the environmental outcomes and long-term visions for each Freshwater Management Unit (FMU) be set as rules in the proposed Land and Water Regional Plan (pLWRP) and that in order to meet these environmental flows and levels, the Otago Regional Council (ORC) must also identify take limits for each FMU and include these as rules in the pLWRP. The long-term visions for each FMU are set in the proposed Otago Regional Policy Statement (pORPS). These visions set out the long-term goals for the water bodies (including groundwater) and freshwater ecosystems in the region that are to be achieved in ambitious but reasonable timeframes.

4. Policy 11 of the NPS-FM requires ORC to ensure freshwater is allocated and used efficiently, and that all existing over-allocation is phased out, and future over-allocation is avoided.

5. The pORPS[2] requires the pLWRP to include environmental flow and level regimes for water bodies (including groundwater) that give effect to Te Mana o te Wai, providing for:
   (a) the behaviours of the water body including a base flow or level that provides for variability,
   (b) healthy and resilient mahika kai,
   (c) the needs of indigenous fauna, including taoka species, and aquatic species associated with the water body,
   (d) the hydrological connection with other water bodies, estuaries and coastal margins,
   (e) the traditional and contemporary relationship of Kāi Tahu to the water body, and
   (f) community drinking water supplies

6. Method LF–FW–M6(5) also requires the pLWRP to include limits on resource use that:

[1] Clauses 3.16 and 3.17
[2] Method LF–FW–M6(4)

(a) differentiate between types of uses, including drinking water, and social, cultural and economic uses, in order to provide long-term certainty in relation to those uses of available water,
(b) for water bodies that have been identified as over-allocated, provide methods and timeframes for phasing out that over-allocation,
(c) control the effects of existing and potential future development on the ability of the water body to meet, or continue to meet, environmental outcomes
(d) manage the adverse effects on water bodies that can arise from the use and development of land…

Previous direction from council and community and mana whenua aspirations

7. Previous direction from Council in relation to the allocation regime[3] has been to:
   - Create a more dynamic allocation system that:
     - Takes a percent allocation approach; and
     - Enables flow sharing and active management by users; and
     - Creates bottom lines.

8. Feedback received through community consultation and engagement with mana whenua undertaken over the period November 2021 to March 2023 that also aligns with national direction indicates a desire to:
   - Restore the health and natural functioning of freshwater bodies that are degraded or over-allocated; and
   - Manage (and allocate) water in a manner that priorities first the health of and well-being of water bodies and freshwater ecosystems, second the health needs of people and third economic uses of water.

What is the outcome sought?

9. The outcome sought is that the take limits and environmental flows set in the pLWRP for rivers/water bodies in Otago represent the end state that achieves the long-term visions in the pORPS. Environmental flows and take limits will also ensure any future over-allocation is avoided and provide limits for the phasing out of existing over-allocation to aim for (in accordance with Policy 11 of the NPS-FM).

Issue 1: How to set environmental flows and take limits for Otago's rivers to give effect to higher order documents when there is limited information available

Available planning responses

10. We are proposing two methods to determine environmental flow and take limits for rivers in the pLWRP – default and bespoke. The appropriate method for a particular river will be determined by:
    - The level of information available on river hydrology, habitat modelling etc; and
    - the existing level of water demand/use; and
    - the level of hydrological modification of a catchment (e.g., dams).

[3] https://www.orc.govt.nz/media/12595/agenda-strategy-and-planning-20220713.pdf. Page 41

Method 1: Default limit setting for 'easy' catchments

11. A default limit setting method for setting environmental flows and take limits based on the Hayes *et al.* 2021[4] guidelines would apply to catchments where there is low hydrological modification and current water demand/use is low (i.e., is within the default limits in table 1), and there is insufficient information available to set bespoke environmental flows and take limits. This approach will maintain a flow regime that presents a low risk of more than minor effects on ecosystem health and wellbeing of Otago's streams/rivers. This includes their instream habitat, life-supporting capacity, mahika kai and fisheries amenity. The default limits will be expressed as a percentage (%) of naturalised 7-day mean annual low flow (MALF). The default take limits, and minimum flows are presented in the table below.

Table 1: Default take limits and minimum flows based on Hayes et al. 2021 guidelines

River size	Take limit (allocation rate)	Minimum flow
Mean flow is less than 5 m^3/s	20% of naturalised 7-day MALF	90% of naturalised 7-day MALF
Mean flow is above 5 m^3/s	30% of naturalised 7-day MALF	80% of naturalised 7-day MALF

12. Key aspects of this proposed approach are:
    - The default limit setting method will initially establish environmental flows and take limits based on a percentage of modelled river flow statistics.
    - As more information becomes available (e.g., more accurate flow statistics) over time, the limits may change to reflect the most up to date MALF estimate.
    - Any new take and use of water will be a prohibited activity where the total consented allocation from a river exceeds the default take limit. This will be required to achieve the 'avoidance of over-allocation' as required under the NPS-FM.

13. This default approach is supported by the ORC science work programme to support the water quantity management in the pLWRP.

14. There are two methods for expressing default take limits and minimum flow. These are shown in Table 2.

Table 2: Overview of methods for expressing default take limits.

Method	Effectiveness	Social/ economic considerations
Numerical limit: set the take limit for rivers as an allocatable volume and/or rate of take in L/s. E.g., The total allocatable rate available from X river as primary allocation is 320 L/s.	This method creates more certainty for water users as the limit cannot be altered without a plan change.	Numerical limit is not dynamic and does not reflect changes as more flow data is collected over time.

[4] Hayes, J., Booker, D., Singh, S., & Franklin, P. (2021). Default minimum flow and allocation limits for Otago. Nelson: Cawthron

Method	Effectiveness	Social/ economic considerations
Narrative limit and methodology: set the take limit for rivers as a percentage of MALF. E.g., The total allocatable rate available from X river as primary allocation is 20% MALF as calculated in accordance with [method in plan].	This method creates more flexibility as the total allocation available will be able to change as more information becomes available through the life of the plan.	This option provides less certainty on the limit and will be most consequential where allocation from a catchment is nearing the limit.

Key question for Governance Group

Q.1. What are your views for setting default minimum flow and take limits in the pLWRP, should the approach be to set:

a) a "hard" limits express as a numerical limit; or

b) a "narrative" limit expressed as a percentage of MALF?

Method 2: Principle-based approach to bespoke limit setting where default method cannot apply

15. Environmental flow and take limit setting that will give effect to national direction and higher order planning documents (NPS-FM and pORPS) is a particular challenge in the highly modified catchments of Otago (for example where dams and on-stream storage/ and water release exists). In these catchments:
    - ORC's current understanding of 'paper'(i.e., unused allocation) and 'actual' water taken and used is limited, in part due to the limitations with the management of allocation under the existing planning framework;
    - there is existing high demand/use and likely over-allocation in relation to water quantity;[5] and
    - there may be insufficient hydrological information available to determine an appropriate take limit to inform the phasing out of over-allocation and set targets that achieve the pORPS visions.

16. This method will use a principle-based approach to set bespoke environmental flows and take limits in catchments where:
    - the default method cannot apply to a catchment (such those described in paragraph 13 above) and
    - there is sufficient information available to inform bespoke take limits and environmental flows (e.g. hydrological modelling and habitat modelling).

17. This principle-based approach will use a consistent set of overarching management principles to ensure bespoke long-term take limits and environmental flows will achieve the pORPS visions and give effect to Te Mana o te Wai. The overarching management principles will be based on:

[5] For example, existing water use is currently above allocation limits set under the current planning framework and/or the Hayes *at al*., default limits

- Mana whenua principles for future management of freshwater; including:
  - Maintaining natural form and function, and the ability of river systems to 'mimic' natural flow behaviour;
  - Recognising interconnectedness across the catchment;
  - Water quality at the confluence or mouth should reflect the quality at the source;
  - Enabling resilient ecosystems;
  - Enabling Kāi Tahu whānui to breathe life into their relationship with the river; and
  - Manaakitaka and reciprocity – use of water must respect the water body and provide for its health where it has been degraded;
- Principles in relation to the level of flow alteration and level of the risk to freshwater ecosystem health are based on:
  - the Hayes *et al.* (2021) guidelines, as presented in paragraph 9 above; and
  - the Richter *et al.,* (2012) presumptive flow standard[6]. This is based on the principle that greater alteration of a river flow regime presents a greater risk to natural river form and structure and ecosystem functions. Flow alterations greater than 20% will likely result in moderate to major changes in natural structure and ecosystem functions. This principle provides a framework for setting flow sharing regimes and the Figure 1 below illustrates how the level of risk increases with the level of flow alteration.
- The principle that communities rely on waterbodies to support their economic and social wellbeing and appropriate environmental flows and take limits that give effect to te Mana o te Wai will support this now and in the future.

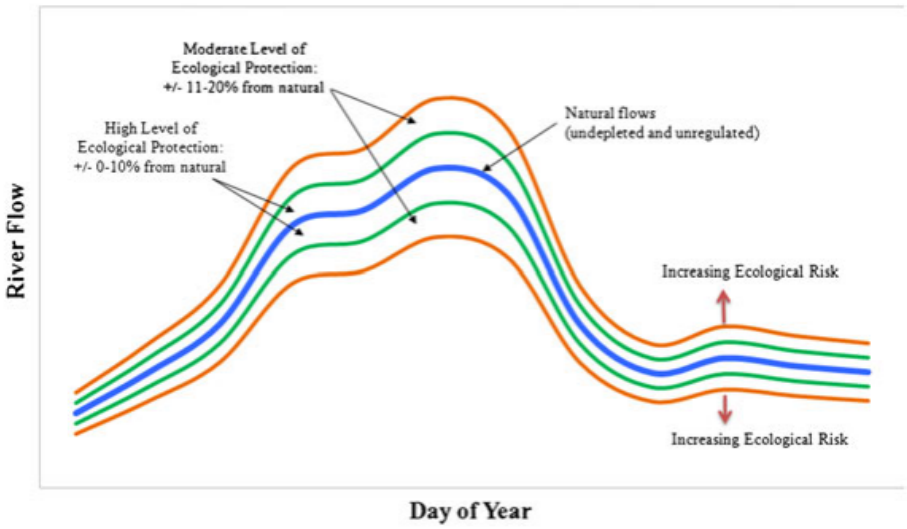


Figure 1: The Richter et al., (2012) presumptive flow standards display how the greater the departure from natural flow conditions, the greater the expected ecological risk.

[6] Richter BD, Davis MM, Apse C, Konrad C 2012. A presumptive standard for environmental flow protection. River Research and Applications 28: 1312-1321

Key question for Governance Group

What are your views on taking an approach that sets bespoke take limits and environmental flows, based on these principles?

ATTACHMENT 2

Land & Water Regional Plan Governance Group

Agenda item 2B: Phasing out over-allocation

Purpose of this paper

1. This is the second of three inter-related papers on water quantity that we are seeking Governance Group direction on. It is focused on options (approaches and timeframes) to phase out over-allocation in relation to water quantity.

Direction in higher order planning instruments

2. The National Policy Statement for Freshwater Management 2020 (NPS-FM)[1] and the Proposed Regional Policy Statement for Otago (pORPS)[2] require that all existing over-allocation is phased out and future over-allocation is avoided. The pORPS[3] also requires that the proposed Land and Water Regional Plan (pLWRP) includes methods and timeframes for phasing out over-allocation for water bodies that have been identified as over-allocated.

3. The NPS-FM defines **over-allocation**, or **over-allocated**, in relation to both the quantity and quality of freshwater, as the situation where:[4]
   (a) resource use exceeds a limit; or
   (b) if limits have not been set, an FMU or part of an FMU is degraded or degrading; or
   (c) an FMU or part of an FMU is not achieving an environmental flow or level set for it under clause 3.16

4. The long-term visions set in the pORPS provide the timeframes and endpoint for achieving the outcomes described in these visions. Phasing out over-allocation is a critical part of the change that will be needed to achieve these outcomes within the time frames shown in Table 1 below. Note that over-allocated catchments are more likely to be in the FMUs / rohe that have longer timeframes.

Table 1: Freshwater vision timeframes for FMU/Rohe

FMU/Rohe	Timeframe
Catlins FMU	2030
Upper Lakes rohe	2030
Dunedin and Coast FMU	2040
Dunstan, Roxburgh and Lower Clutha rohe	2045
North Otago FMU	2050
Taieri FMU	2050
Manuherekia rohe	2050

[1] NPS-FM, Policy 11
[2] Policy LF-FM-P7(5)
[3] Method LF-FW-M6 (5)(b)
[4] NPS-FM, clause 1.4(1)

Previous direction from Council and community and mana whenua aspirations

5. Previous direction from Council has been that the pLWRP should:[5]
   - Provide for a quicker transition to phase out over-allocation; and
   - Include clear signals of the timeframe for reductions in allocations to be achieved; and
   - Set up methods to first understand the extent of current allocation and over-allocation, and how this will interact with a proposed flow regime; and
   - Encourage flow sharing regimes.

6. Feedback received through community consultation and engagement with mana whenua undertaken over the period November 2021 to March 2023 that also aligns with national direction indicates a desire to:
   - Restore the health and natural functioning of freshwater bodies that are degraded or over-allocated; and
   - Manage (and allocate) water in a manner that priorities first the health of and well-being of water bodies and freshwater ecosystems, second the health needs of people and third economic uses of water.

Issue 1: Need for more guidance on how to phase out over-allocation

7. There is no specific direction in the pORPS regarding how existing over-allocation is to be phased out. In addition, the operative Regional Plan: Water for Otago primarily used methods to reduce 'paper' (i.e. unused) allocation. Voluntary reduction of actual water use has not been successful in the past. Further direction is now sought from the Governance Group on:
   - methods for phasing out over-allocation; and
   - how to best use time to phase out over-allocation within the RPS vision timeframe.

Available planning responses

The 'big picture' planning response

8. The proposed planning response to phase out existing over-allocation will include a 'package' of tools. The specific package for each catchment may vary depending on the magnitude of over-allocation in a catchment, the vision timeframe and the level of system change that is required.

9. The pLWRP will establish the framework for a two-stage phase-out process in highly modified and over-allocated catchments where the level of system changes and reduction in actual take and use of water required to meet the end state is currently uncertain.

10. Figure 1 below is a schematic of the key concepts and steps in the phase out of over-allocation to meet the target end state (refer to Paper 2A) ahead of achieving the long-term visions in the pORPS. The schematic considers a catchment within an FMU with a vision timeframe of 2040/50 (such as the Manuherekia or Taieri FMU).

[5] Team LWRP - Appendix 1- RW workshop - settled issues (overview of feedback) - pdf version.pdf - All Documents (sharepoint.com)

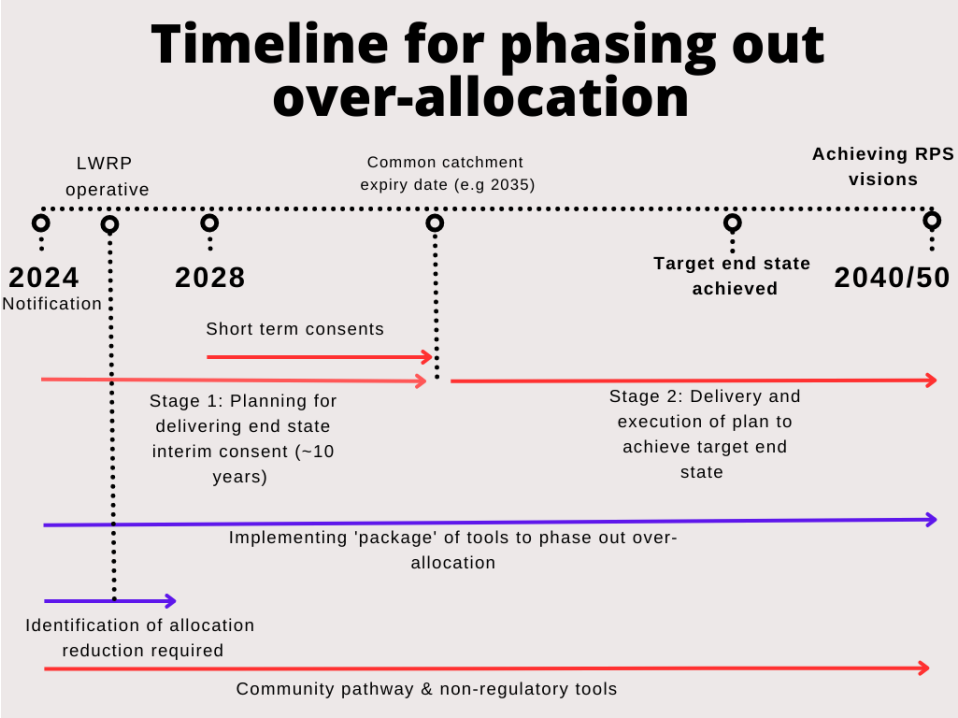


Figure 1: Timeline for phasing out over-allocation within pORPS visions timeframes

11. Stage 1 will be about reducing water use where possible, while planning for delivering the end state. The key aspects of Stage 1 are:
    - Identifying actual use allocation reduction required (to inform reduction plan);
    - Stepped increases in minimum flows;
    - Strict consent conditions that require investment and asset management plans that will deliver end state in stage 2;
    - Reviewing consents that have expiry dates beyond 2030 to establish mandatory planning requirements to achieve the target end state;
    - Considering opportunities for longer consenting terms where an allocation reduction to meet the target end state can be achieved sooner (e.g., within Stage 1)[6];
    - Additional requirements for water users including removing any remaining paper allocation, ensuring efficiency in use and establishing a robust measuring network to enable accurate water accounting;
    - Strong monitoring and enforcement of consent conditions;
    - Consent terms aligning with common catchment expiry dates; and

[6] Would likely only be when the risk or uncertainty in relation to the water use is low and the confidence that the end state will achieve the long-term outcomes is high.

- Whole-of-catchment forward planning to achieve the target end state and to reduce the total number of consents in over-allocated catchments[7].

12. Stage 2 will see the delivery and execution of plans to achieve the end state and achieve the pORPS visions. The key aspects of Stage 2 are shown in Table 2 below.

Table 2: Key aspects of Stage 2 for ORC and water users

ORC	Water users
• A consenting framework that ensures the target end state is met ahead of the pORPS vision's timeline. • Implementation plan, with strong monitoring and enforcement of consent conditions.	• The implementation of targeted investment plans • A policy and consenting framework that requires the implementation of targeted investment plans • Consents being subject to demonstrated progress and commitment towards the target end state. • Incentivising and encouraging catchment consents and allocation reduction plans at the catchment scale.

13. Figure 2 below illustrates how we expect water users to respond through the planning phase into common catchment expiry date during Stage 1 and then the secondary delivery and execution phase during Stage 2.

[7] Note this may not be possible for some locations until investment and management plans are implemented.

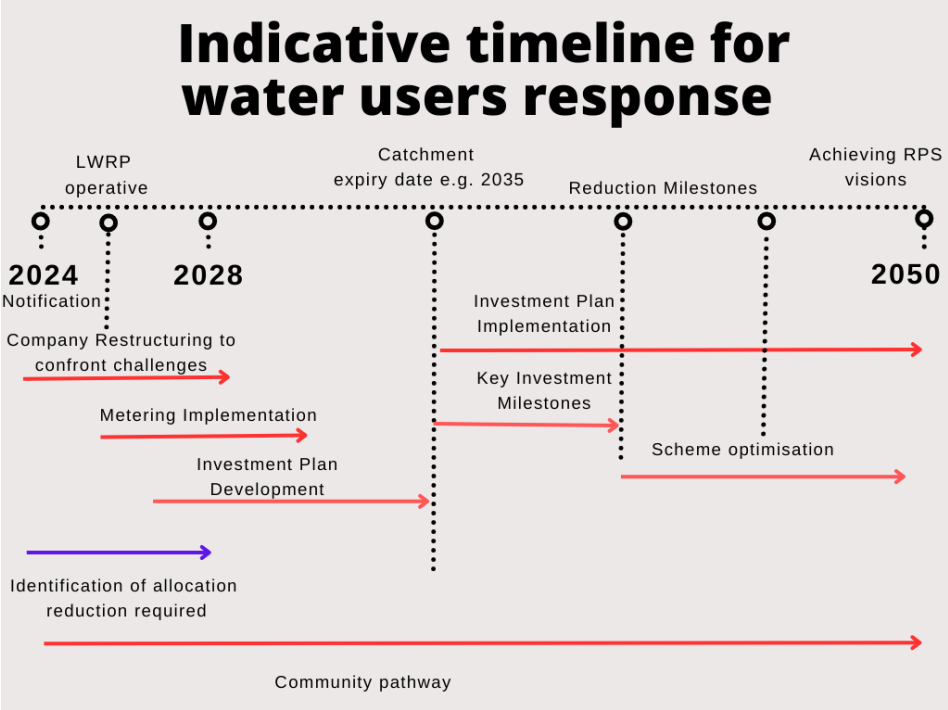


Figure 2: Indicative timeline for water users' response to phasing out over-allocation

Phasing out over-allocation with a 'package' of management tools

14. Phasing out over-allocation in Otago is a difficult task, particularly given the complexity of the current planning framework, the historical and current water use and the challenge of determining which water users' allocation must be reduced and by how much.

15. The proposed planning response to phase out over-allocation will include a 'package' of management tools to achieve this aim and must include the following:
    - Prohibited activity status for new takes from fully or over-allocated catchments to prevent any further over-allocation.
    - The removal of firstly any remaining paper allocation, and in some cases reductions in actual allocation if required.
    - Ensuring efficiency in water use.
    - Establishment of a robust measuring network to enable accurate water accounting.

16. Additional planning tools are being considered that have not been discussed above. These are described and evaluated in Appendix A.

Key questions for Governance Group

Q1. What are your views on the proposed two-stage approach to phasing out over-allocation for highly modified and over-allocated catchments?

Q2. What are your views on the additional management tools being consider as part of the 'package' to phase out over-allocation?

Issue 2: Should any types of water takes/uses be prioritised in the phasing out of over-allocation?

17. The prioritisation of water uses must align with the hierarchy established to give effect to Te Mana o te Wai in the NPS-FM. The pORPS policies provide some additional guidance for which water uses within any tier of the hierarchy should be prioritised. These may apply when phasing out over-allocation:
    - Policy EIT-EN-P2 requires decisions on the allocation of fresh water to recognise the national, regional and local benefits of existing renewable electricity generation activities and to take into account the need to at least maintain renewable electricity generation capacity.
    - Policy EIT-INF-P10 requires that decision making on the allocation or use of natural and physical resources must take into account the needs of nationally and regionally significant infrastructure.

18. Further direction is needed around the types of takes and uses, if any, that should be prioritised.

Available planning responses

19. Staff consider, to align with national direction, the following types of takes / uses could be prioritised when phasing out over-allocation:
    - Drinking water supplies
    - Renewable electricity generation

Table 3: Uses or takes that could be prioritised when phasing out over-allocation

Use or take	Effectiveness	Social/economic impacts
Drinking water supplies The drinking water component of any take would be given first priority in allocation when calculating how allocation is to be reduced.	Drinking water is likely to form part of the use of water in over-allocated catchments but in most cases will be a minor proportion of the total allocation. Therefore, prioritising drinking water supplies is unlikely to have significant effects on the effectiveness of the overall approach for phasing out over-allocation.	Reflects the second priority of Te Mana o Te Wai and ensures communities have security of supply for drinking water.
Renewable electricity supply Water specifically taken and used for renewable electricity generation (e.g. hydro-electricity generation) would not be prioritised	Many but not all takes for hydro-electricity generation are considered non-consumptive takes and are not subject to the allocation framework. However, there will be some takes for hydro-electricity generation that fall within the definition of a consumptive take, where water is not immediately returned to the same water body. The impact of this prioritisation on the	This method is likely to have a positive impact on the wider community by allowing for hydro-electricity generation schemes to continue to operate at their current level under the new freshwater management regime set in the pLWRP.

Use or take	Effectiveness	Social/economic impacts
in available allocations.	effectiveness of the overall approach for meeting allocation targets will depend on the proportion of water taken for hydro-electricity generation within the overall allocation for the catchment.	This method is unlikely to have any economic impacts on other water users if: • any water taken for hydro-electricity generation is non-consumptive and remains instream; and • water taking for hydro-electricity generation does not result in additional take restrictions for other water users.

Key questions for Governance Group

Q1. What are your views on whether any of the takes/uses listed in Appendix A Table 3 should be prioritised in the overall approach to phasing out over-allocation?

Q2. Are there any other takes/uses that should be prioritised?

Appendix A: Additional methods and approaches for phasing out over-allocation

Table 1: Additional regulatory methods for phasing out over-allocation

Method	Effectiveness	Social/economic considerations
Establish consenting regime for new and existing takes (Stage 1 & 2): Require consent in over-allocated catchments for new and existing takes, including takes that would otherwise be a permitted activity in other catchments that are not over-allocated. The consent framework will also ensure that the quantity of water taken reflects efficient use for the intended purpose.	Once consented these takes will be required to be measured. This will enable a more refined and detailed understanding of all the water taken and used within an over-allocated catchment and assist with freshwater accounting. Requiring consent may drive water users to find alternative sources or reconsider development. It will be effective in preventing any further over-allocation and will assist with phasing out over-allocation. This method does require certainty on the environmental limit.	This method will: • create consent preparation and processing costs for certain categories of water users; and • restrain future development and growth in these catchments. However, not limiting any further taking of water in catchments that are already over-allocated could have economic impacts on existing water users (through reduced availability of water or increased occurrence of minimum flow restrictions) or could result in investment in activities that are economically and environmentally unsustainable in the long term.
Short term consents (Stage 1): Use short-term consents *(aligned with common catchment expiry date)* to replace any consents that expire within the next 10 years. This would provide time for the infrastructure and adaptation planning needed to achieve water take reductions to phase out over-allocation within the pORPS visions timeframe. The short-term consent would focus on removing paper allocation and ensuring the quantity of water allocated is no more than what is needed to use the water efficiently for its intended use.	This method in combination with others will be effective in using time to enable consent holders to work together to find long term solutions.	This method may create additional consent preparation and processing costs for consent holders. Provides consent holders with time to develop long term solutions for achieving desired environmental outcomes and allows them to strategically invest in infrastructure.

Method	Effectiveness	Social/economic considerations
Collective catchment reduction targets (Stages 1 & 2): Require water users within a catchment to determine how the reduction in over-allocation will be achieved, and how any remaining available water within the catchment will be used.	This method will be effective in enabling catchments to work together to achieve the environmental limits for the catchment. Collective catchment reduction targets create clarity and certainty about the scale of overall water use and the allocation reduction at catchment scale required to meet limits. Unlike set reductions in allocation that would be applied uniformly to individual consent holders within the catchment at the time they apply for a replacement consent, this method provides flexibility for water users within a catchment.	Catchment stories and community consultation showed support for collective approaches. This method requires clear controls and criteria to avoid negative outcomes for some parts of the catchment (e.g. setting take limits at tributary level to avoid impacts of water taking on tributaries or parts of the catchment with high values). Proactive facilitation of catchment group formation or assistance with the development of community initiatives may assist with ensuring that catchments with limited social cohesion are not disadvantaged.
Restrict irrigation expansion (stage 1): Use fixed irrigation areas to limit future irrigation expansion in a catchment that is over-allocated in terms of water quantity and/or quality. This could be at the farm scale or catchment scale.	This will enable allocation reduction from gains in efficiency of use where existing systems are inefficient. The level of effectiveness in terms of reducing water allocation will depend on the current level of inefficiency in any one property or catchment. This method may have additional benefits in terms of improving water quality within the catchment.	This method may place limitations on future development and growth. However, not limiting any further intensification or irrigation expansion in catchments that are already over-allocated or degraded could have long term economic impacts on existing water users by allowing for investment in activities that are economically and environmentally unsustainable in the long term.

Method	Effectiveness	Social/economic considerations
Reducing allocation for transfers of site within the same catchment or aquifer (Stage 1 & 2): When an application is received to transfer/move the site of a water take in an over-allocated catchment, the most stringent, or a combination of one of the following are put in place: • The quantity of water transferred can be no more than that historically taken as demonstrated in water metering records. • The current purpose of use is assessed, and only efficient volumes can be transferred. • The take is automatically reduced by a minimum percentage (e.g. 20%).	The effectiveness of the method at phasing out over-allocation is limited by how many transfers occur. Transfers occur periodically but have been a function of over-allocated catchments to date. The effectiveness also depends on the level of reduction that can be achieved through consideration of historic water take data and efficient use requirements if there is no automatically reduced percentage.	
Less complex planning approach for alternative sources: Provide simpler consent pathways for taking and using water from alternative water sources in an over-allocated catchment. This approach would apply where: • these water sources are not over-allocated; • no cross-mixing of water / inter-catchment transfers of water occur; and • the activity can be undertaken in accordance with the NPS-FM 2020.	This method enables alternative water sources to be considered to complement other methods.	
Less complex planning approach for alternative sources: Provide simpler consent pathways for resource consent applications to take water within supplementary allocation (at higher flows) where this water is currently allocated within primary allocation.	This method enables alternative water sources to be considered to complement other methods.	

Table 2: Non-regulatory methods for phasing out over-allocation

Method	Effectiveness	Social/economic impacts
Financial support Funding support to upgrade infrastructure.	This is a complementary method and will need to be supported by requirements for investment plans and clear policies outlining expectations for infrastructure.	Catchment stories indicated that communities would have a positive view of ORC providing transitional financial support to farmers and water users, while recognising the need for change. However, the economic cost of providing financial support for water users is likely to fall on the wider community.
Provide advice/ information Providing information and support on alternatives for improving intake, conveyance and use efficiency and collective approaches.	This is a complementary method to enable development of infrastructure plans and/or improvements in efficiency.	Catchment stories indicated that communities would have a positive view of ORC providing transitional support to farmers and water users, while recognising the need for change.
Development of catchment action plans Action plans are required as part of the National Objectives Framework of the NPS-FM to achieve the environmental outcomes for a rohe or FMU. These action plans could include methodologies and initiatives to promote reduced water use.	These may only be required for some catchments and there may be limitations to achieving water use reductions in the catchment through non-regulatory action planning.	ORC Catchment Action Plans provide an opportunity for development of collective approaches to water allocation.
Promoting good land management practices/ land uses Promoting land management practices that reduce water demand and/or sustainable land uses that are less reliant on water.	This is a complementary method. Promotion will increase awareness about the need to reduce water use or conserve water, but there is no requirement to do anything or make a change.	Catchment stories (and other social research) suggests that "farmers encouraging farmers" could be an effective way of achieving adoption of best practice
Sustainable land use Research into farming systems and alternative land uses that have low water requirements within over-allocated catchments.	This method will support the above by providing region specific information to facilitate change in land use. The effectiveness will depend on the applicability and economic viability of the land use options.	Any research on land use will need to integrate environmental, social and economic aspects of sustainability.

ATTACHMENT 3

Land & Water Regional Plan Governance Group

Agenda item 2C: Setting environmental levels and take limits for lakes

Purpose of this paper

1. This is the third of three papers. Its purpose is to seek direction from the Governance Group on approaches to set environmental levels and take limits for different categories of lakes in Otago.

Direction in higher order planning instruments

2. The National Policy Statement for Freshwater Management 2020 (NPS-FM)[1] requires that environmental levels for each Freshwater Management Unit (FMU) be set as rules in the proposed Land and Water Regional Plan (pLWRP) and that these levels achieve the environmental outcomes for the values relating to the FMU or relevant part of the FMU. The NPS-FM[2] also requires that take limits are identified for each FMU and that these are included as rules in the pLWRP.

3. Take limits must ensure that any taking, damming, diversion or discharge of water meets the environmental outcomes for lakes, any connected water bodies, and receiving environments.

4. The Proposed Regional Policy Statement for Otago (pORPS)[3] includes direction for setting environmental limits for lakes, requiring environmental regimes to give effect to Te Mana o te Wai including by providing for:

   (a) the behaviours of the water body including a base flow or level that provides for variability,

   (b) healthy and resilient mahika kai,

   (c) the needs of indigenous fauna, including taoka species, and aquatic species associated with the water body,

   (d) the hydrological connection with other water bodies, estuaries and coastal margins,

   (e) the traditional and contemporary relationship of Kāi Tahu to the water body, and

   (f) community drinking water supplies.

5. There is no other specific direction within the pORPS relating to the setting of environmental levels, but there are other methods[4] in the pORPS that require the effects of taking, use, damming and diversion of water to be managed where these activities relate to the management of renewable electricity generation, infrastructure activities, transport activities and historic heritage. These methods will apply to the taking of water from lakes and must be considered when setting lake limits.

[1] Clause 3.16
[2] Clause 3.17
[3] Method LF-FW-M6(4)
[4] EIT-EN-M1, EIT-INF-M4, EIT-TRAN-M7, HCV-HH-M4

Previous direction from Council and community and mana whenua aspirations

6. There has been no specific previous direction from Council in relation to setting environmental levels and take limits for lakes in the Otago region beyond the direction provided broadly in relation to environmental flows and limits.

7. Feedback received through community consultation and engagement with mana whenua undertaken over the period November 2021 to March 2023 also indicates a desire to:

    - restore the health and natural functioning of freshwater bodies that are degraded or over-allocated; and
    - manage (and allocate) water in a manner that prioritises first the health of and well-being of water bodies and freshwater ecosystems, second the health needs of people and third other uses (including economic uses) of water.

Issue: The statutory definition of 'lake' is broad and there is limited data for most lakes in Otago

8. The statutory definition of 'lake' in the Resource Management Act 1991 (RMA)[5]is very broad and the lakes in the Otago region are very diverse. The following types of lakes exist within the region:

    - natural and artificially constructed lakes,
    - shallow and deep lakes,
    - small and large lakes,
    - coastal and inland lakes,
    - lakes with Water Conservation Orders on them and those without.

9. There is very limited data on lake levels and other lake parameters in Otago. In addition, there is no specific national framework for setting environmental levels or take limits for lakes.

10. To meet the requirements of the NPS-FM and the pORPS it is proposed that the pLWRP specifies clearly defined categories of lake. The approach to setting environmental levels and take limits would be different for each of these categories based on availability of data, the values and environmental outcomes associated with the lakes and whether the lake is natural or artificially formed. The planning responses outlined below are specific to each lake category.

Available planning responses

11. The proposed planning responses for each category of lakes are summarised in Table 1 below and further detail is provided under each heading.

[5] Lake means a body of fresh water which is entirely or nearly surrounded by land

Table 1: Overview of planning responses for each category of lakes are summarised

Lake category	Examples of Lakes	Planning response – new takes, diversions, damming	Planning response – existing takes, diversions, damming
Natural unmodified lakes	Lake McKellar/Ōtākaha, Moke Lake/ Punamāhaka/Waikā māhaka, Lake Sylvan, Catlins Lake and Sutton Lake	• Narrative limit. • Prohibit any new takes (except s14(3)(b))	• Narrative limit • No existing consented takes. • May be existing permitted activity takes
Natural lakes with current consents	Lake Waipōuri, Lake Alta, Lake McKay	• Narrative limit • Prohibit any new takes (including permitted?)	• Narrative limit • Existing consented takes to be subject to the river environmental flow and take limits
Lakes Wānaka and Whakatipu		• Specific lake level & take limit • Permitted activity rules & consent pathway for new takes within the lake level & take limits	• Specific lake level & take limit • Permitted activity rules & consent pathway for replacement takes within the lake level & take limits
Artificial lakes – out of stream	On farm reservoirs & ponds that are out of stream	• No limits to be set as the lake will not contribute to meeting the environmental outcomes of the FMU	
Artificial lakes – instream	Poolburn Reservoir, Fraser Dam, Butchers Dam, Falls Dam, Lower Manorburn Dam	• Catchment (river) environmental flows and take limits to apply • Rules will align with catchment (river) rules	
Lakes with existing management levels	Lake Dustan, Lake Roxburgh, Lake Hāwea, Lake Onslow	• Existing consented lake levels set as environmental levels in the medium term. • Lakes Dunstan, Roxburgh and Onslow - catchment (river) environmental flows and take limits to apply to new consents. • Lakes Dunstan, Roxburgh and Onslow - Catchment-wide permitted activity and take rules to apply. • Lake Hawea and Tuakitoto – prohibition on new takes or prescribed take limits	• Existing consented lake levels set as environmental levels in the medium term. • Lakes Dunstan, Roxburgh and Onslow - catchment (river) environmental flows and take limits to apply to existing consents. • Lakes Dunstan, Roxburgh and Onslow - Catchment-wide permitted activity and take rules to apply. • Lake Hāwea and Tuakitoto – replacement consents in accordance with catchment (river) environmental flow and take limits or prescribed take limits

Natural unmodified lakes

12. The first category of lakes comprises natural unmodified lakes. Many of the natural lakes in Otago are highly valued for their naturalness, have unique freshwater ecosystems, are connected to wetlands and/or are subject to Water Conservation Orders. Examples of such lakes are included in the table above. There is currently no lake level data or other relevant data for setting numeric

environmental levels or take limits for these natural lakes. Given the uniqueness of these lakes and lack of current data, it is proposed that a narrative approach be taken to describe the environmental levels and take limits for any lakes included within this category.

13. The narrative limit would be to maintain the natural lake levels and volumes. This limit would be achieved through a rule framework that prohibits all takes from the lakes or any activity that could vary the lake levels and volumes, except for water takes for an individual's reasonable needs for stock or drinking water in accordance with s14(3) of the RMA. This approach will enable these lakes to behave naturally. Examples of activities that could affect the lake levels and natural lake behaviour include takes from upstream tributaries, diversions of water around the lake, taking of hydraulically connected groundwater, discharges into upstream tributaries and managed discharges from the lake.

14. For this narrative limit to be effective it may need to include both consented and permitted activities. There would need to be further work done to identify whether some permitted activities could be provided for that would enable the narrative limit to be complied with.

15. Most lakes within this category currently do not have any consented takes/discharges from them or do not have any consented takes/other activities within their upper catchment that could affect lake levels and volumes (see below for natural lakes with consents). The prohibition would be effective at maintaining and preserving the levels of these lakes and would have limited impacts on users (given existing use is limited). It would prevent future development in and around these lakes where lake water was sought to enable this.

16. If it would be considered appropriate that environmental levels and take limits be set for (some of) these lakes in the future to enable some taking of water, direction is sought on:

    - whether the pLWRP should identify the lakes for which environmental levels and take limits need to be set;
    - the specific monitoring that the Council must undertake; and
    - the timeframes for setting these environmental levels and take limits.

Natural lakes with current consents

17. This category includes a small number of natural lakes (e.g. Lake Waipōuri, Lake Alta and Lake McKay) with existing activities (water takes, discharges) occurring in/from the lake or in the upper catchment that may affect natural lake levels and behaviours. It is proposed that the rule framework for managing natural unmodified lakes (as outlined above) applies to any new takes from lakes within this category and to any new activities (water takes, discharges, damming) in their upper catchment.

18. For any existing consented activities occurring in the upper catchments of these lakes, it is proposed that these will be made subject to the catchment environmental flow and take limits determined using Hayes/Richter and/or a principled approach that will take into consideration the interconnectedness with downstream water bodies (see Paper Agenda item 2A). Any existing takes from the lakes themselves would also be made subject to these limits. Consideration of these consents in accordance with the environmental flow and take limits set for the river systems will ensure that these lakes will continue to contribute to achieving the environmental outcomes for the FMU.

19. This approach will be effective in meeting the requirements of the NPS-FM by applying a ki uta ki tai approach that allows for consideration of water quantity impacts of consented activities in the upper catchment on the lake.

Natural lakes - Lakes Wānaka and Whakatipu

20. Lakes Wānaka and Whakatipu are large inland deep glacial lakes where some abstraction of water could occur without a noticeable impact on lake levels and lake values or on their ability to achieve wider FMU environmental outcomes. Both lakes are subject to restrictions on their use: Lake Whakatipu via the Water Conservation (Kawarau) Order 1997 and Lake Wānaka via the Lake Wanaka Preservation Act 1973. There has been some lake level and discharge data collected for these lakes.

21. It is proposed that specific lake levels and allocation limits be established in the pLWRP for Lakes Wānaka and Whakatipu. Limits would be based on technical advice received on lake levels and allocation limits that takes into account the key values of the lakes as expressed through the water conservation order, Lake Wanaka Preservation Act, pORPS visions and draft environmental outcomes for the Upper Lakes FMU. Consistent with a ki uta ki tai approach, as required by Te Mana o te Wai, these allocation limits and lake levels would apply to activities (taking, damming, diversion and discharges) occurring in the lake as well as in the lakes' upper catchments.

22. Rules would be established that would provide for a consent pathway for takes within the allocation envelope, subject to lake levels. These rules would be consistent with those that apply across the region (e.g. in respect of efficiency of water use) and would apply to new and existing takes.

23. This approach will be effective by establishing clear limits that are in accordance with the NPS-FM and achieve the environmental outcomes for the FMU, while also providing certainty to resource users around available allocation and limitations on use (water levels).

Artificial lakes

24. Artificial lakes are lakes that have been created by the damming of water that results in the creation of a reservoir behind the dam structure. There are two categories of artificial lakes. The first category comprises artificial lakes that are formed by the damming of a water body. These are termed instream artificial lakes. The second category refers to artificial lakes created by a dam structure on land with no water body. Lakes in this second category are termed out of stream artificial lakes.

25. Artificial lakes in both categories are of varying sizes and prominence in the region and are often managed by humans for uses such as recreation, irrigation, hydro-electricity generation and community water supply.

Artificial lakes - instream

26. Instream artificial lakes are typically part of a wider river system. The inflows to the instream artificial lakes are usually the headwaters/tributaries of the main stem or the main stem of the river itself. While man-made, the management of these lakes plays an important role in achieving the environmental outcomes for the FMU or part of the FMU. While there is a requirement under

the NPS-FM to set environmental levels and take limits for each FMU, these limits do not need to be specific for each reservoir within an FMU to comply with the NPS-FM.

27. As noted previously, there is no standard methodology for setting lake levels or take limits for lakes. In the case of instream artificial lakes, the setting of environmental levels and take limits can become even more complex as such levels and limits could create tension during prolonged dry periods when decisions need to be made whether to maintain a specific level in the instream artificial lake or maintain an environmental flow downstream of the dam.

28. For these reasons, it is proposed that instream artificial lakes are considered to be part of the river system and that the methodology and principles that apply to establishing environmental flow and take limits for rivers be applied to these artificial lakes (refer to Paper Agenda item 2A). This means that any water that is stored by these lakes needs to be taken in accordance with the take limits that apply to that river/catchment.

29. Under this approach it is also proposed that the any damming or taking activity associated with instream artificial lakes will be subject to a requirement to maintain a downstream flow that is equivalent to the upstream flow minus any consented allocated water and that any environmental flows that apply to the catchment.

30. This approach recognises the interconnectedness between these lakes and the wider catchment (ki uta ki tai) and assists with achieving FMU environmental outcomes relevant to this catchment. It also recognises that artificial dams are potentially temporary structures (a water permit for damming is finite and subject to replacement) and that the reservoirs that result from damming may not always be part of the catchment.

Artificial lakes – out of stream

31. Although out of stream artificial lakes may fall within the definition of a 'lake' in the RMA, they do not require environmental limits to be set for them. This is because there is no natural connection between the out of stream artificial lake and other water bodies and any lake levels set for this lake or reservoir will not contribute to achieving an environmental outcome for the FMU or part of the FMU. Similarly, as the water stored within these lakes has already been taken from an original source water body in accordance with the allocation requirements for that catchment, there is no requirement or need to set a take limit. Any water taken from this out of stream artificial lake will be a 'retake' of allocation water.

32. It is proposed that out of stream artificial lakes are not subject to environmental limits. Such an approach will assist with prevent double-counting of allocation while meeting the NPS-FM requirements with respect to freshwater accounting. Any exceptions (i.e. out of stream artificial lakes with a hydrologic connection to water bodies) would be treated as instream artificial lakes as per below.

33. This approach will require a clear definition of what an out of stream artificial lake is.

Lakes with existing management levels

34. This category includes lakes that have existing lake levels and/or take limits set either as conditions on current water permits for the damming and/or taking of water from this lake or in the operative Regional Plan: Water for Otago (RPW). Lakes that fall within this category are managed natural lakes such as Lake Hāwea and Lake Tuakitoto and managed artificial lakes such as Lake Dunstan,

Lake Roxburgh and Lake Onslow. Many of these lakes have damming consents that have expiry dates from 2040 onwards (i.e. beyond the life of the LWRP).

35. It is proposed that initially (i.e. in the medium term) the existing lake levels that have been set through consents conditions or in RPW are adopted as environmental levels for these lakes in the pLWRP, but that these levels are reassessed within the life of the pLWRP and prior to the expiry of any consents that establish these lake levels.

New and existing takes

36. For new and existing takes from managed artificial lakes (Lake Dunstan, Lake Roxburgh and Lake Onslow) it is proposed that the management regime outlined above for instream artificial lakes will apply. This would mean that the take limits that apply to the river catchment within which the lake is located would also apply to any takes from the managed artificial lake. For example, under this scenario takes from Lake Dunstan or Lake Roxburgh would be subject to the take limits that apply to the Clutha River/Mata-Au.

    For new takes from managed natural lakes (Lake Hawea[6] and Lake Tuakitoto[7]) there are two approaches that could be taken. The first approach would be identical to the one proposed for natural lakes (as described above), whereby no new activities that could alter lake levels are enabled. The second, alternative approach would be to set prescribed allocation limits based on technical advice and is similar to the approach proposed for Lakes Wānaka and Lake Whakatipu.

Existing damming, diversions and discharges

37. In terms of the damming of these lakes, it is proposed that for managed lakes with existing lake levels set through conditions of consent, these lake levels and relevant consent expiry dates are identified and included in a schedule in the pLWRP. For managed lakes with existing lake levels set in the RPW, these lake levels would also be included within this schedule. The policy and rules could provide for these lake levels to remain until the expiry of the consents.

38. For this category of lakes the proposed approach is to establish the existing lake levels and take limits as an interim levels and limits in the pLWRP and include in pLWRP a framework for Council to review the existing lake levels and take limits in accordance with the requirements of the NPS-FM 2020 within the lifespan of the pLWRP or prior to the consent expiry (where relevant). The following criteria or principles could be considered when reassessing lake levels and take limits.

    - Te Mana o te Wai, and particularly the requirement to prioritise, first, the health and well-being of the water body, and
    - the environmental outcomes for the relevant FMU or part of the FMU.
    - the impacts of any levels and/or take limits for these lakes on the health and allocation status of connected water bodies and any direction established in the LWRP to avoid over-allocation and/or phase out existing over-allocation.

[6] Although Lake Hāwea is dammed it is a deep water lake located in the Upper Lakes rohe similar to Lake Wānaka and Lake Whakatipu

[7] Lake Tuakitoto is described as a 'humic lake' and is the only one of its kind on the South Island's east coast. Lake Tuakitoto is the only lake that currently has a lake level limit set in the RPW and a prohibition on taking when water is below a set lake level.

Key questions for Governance Group

Q1. What is your view with respect to the methods discussed above for establishing environmental limits in relation to lakes?

Q2. Should provision be made for permitted activity takes from natural unmodified lakes? And if so, for what types of takes should we provide for through a permitted activity rule framework?

Q3. What approach to setting take limits should apply for Lake Hawea and Lake Tuakitoto?

Q4a. Given the lack of data currently available on lakes, should the pLWRP direct Council to collect lake level, discharge rate and other necessary lake data to enable consideration of setting numeric lake levels for some natural lakes in the subsequent plan?

Q4b.If yes, should data collection begin on those lakes where there are current consents from the lakes or upper catchment (e.g. Lake Alta, Lake McKay) and should there be direction in this plan to set numeric limits for these lakes during the plan life?

Q5a. For lakes with existing management levels should these lake levels be reconsidered by a set date in the pLWRP?

Q5b. If lake levels for lakes with exiting management levels are reconsidered during the life of the pLWRP should provision be made to review existing consents to impose these limits prior to consent expiry?

ATTACHMENT 4

Land & Water Regional Plan Governance Group

Agenda item 1A: Setting target and interim target attribute states

Purpose of this Paper

1. This paper provides the Governance Group with an overview of the current attribute states, as derived from the Otago Regional Council's State of the Environment (SoE) monitoring data, and drafts of the proposed target attribute states (TAS) which will form part of the proposed Land and Water Regional Plan (pLWRP). This information will inform your discussion on how to maintain and improve water quality in Otago[1] i.e., the draft planning responses. The paper also seeks your feedback on a proposed approach for setting interim TAS, where interim TAS are required under the National Policy Statement for Freshwater Management (NPS-FM).

Background

2. The National Objectives Framework (NOF) set out in Clause 3.7 of the National Policy Statement for Freshwater Management (NPS-FM) requires regional councils to:
   a. identify freshwater management units (FMUs) in the region
   b. identify values for each FMU
   c. set environmental outcomes for each value and include them as objectives in regional plans
   d. identify attributes for each value and identify baseline states for those attributes
   e. set target attribute states, environmental flows and levels, and other criteria to support the achievement of environmental outcomes
   f. set limits as rules and prepare action plans (as appropriate) to achieve environmental outcomes

3. Clause 3.7 further requires that at each step of the NOF process, every regional council must engage with communities and tangata whenua and apply the hierarchy of obligations set out in Clause 1.3 of the NPS-FM.

4. FMUs and rohe for the Otago region have been identified and have been included in the proposed Regional Policy Statement for Otago 2021 (pORPS). Values for each FMU and rohe have also been identified using the process outlined in Clause 3.9 of the NPS-FM and building on mana whenua input and community feedback collated during the first stage of consultation on the proposed LWRP which occurred over the period November 2021 to April 2022.

5. Draft environmental outcomes for identified values have been developed in partnership with mana whenua and were consulted on during the second stage of community consultation on the pLWRP from October to December 2022.

6. Staff are currently in the process of identifying attributes, identifying baseline states for those attributes and developing TASs. This paper focusses on setting TASs for water quality.

[1] As required under the NPSFM, Councils are required to at least maintain, or improve water quality.

Setting target attribute states and timeframes for achieving them

7. Clause 3.11 of the NPS-FM stipulates that ORC must set a target attribute state (TAS) for every attribute identified for a value and identify the site or sites to which the TAS applies.
8. Target attribute states for every value with attributes (except the value human contact)[2] must be set at or above the baseline state of that attribute.[3] If the baseline state of an attribute is below any national bottom line for that attribute, the TAS must be set at or above the national bottom line.[4]

9. Under Clause 3.11, ORC must also specify a timeframe for achieving the TAS or, if the TAS has already been achieved, state that it will be maintained from a specified date. When setting timeframes for achieving TASs ORC must ensure that these are set in such a way that they will achieve the environmental outcomes for each relevant value set in the pLWRP, as well as the relevant long-term visions set in the pORPS (within the timeframes specified in the pORPS for achieving these visions). The timeframe for achieving the TASs that will be included in the pLWRP will be determined taking into account the final timeframes for achieving the relevant long-term visions set in the pORPS.
10. Staff have developed draft TASs for Otago's FMUs and rohe, which are included in Appendix 1. These are based on achieving the notified visions and the drafts of the environmental outcomes. These are very much draft and so still subject to change, but provide an indication of the need to make substantial progress to improve water quality in several FMUs and rohe. Information on the current states for various attributes, as derived from the ORC's SoE monitoring data is also included in Appendix 1, while Appendix 2 provides a high-level overview of the key observations drawing on SoE monitoring data.

Setting interim TASs

11. Under the NPS-FM timeframes for achieving TASs may be any length or period. However, if timeframes are beyond the 10-year life of the LWRP, they must include interim TASs (set for intervals of not more than 10 years) to be used to assess progress towards achieving the TASs in the long term.
12. Staff have developed guidelines for setting interim TASs for SoE monitoring sites where:
    a. the TAS is two to three levels above the current state i.e., from a current C to a target A or from a current D to a target A respectively; and
    b. the TAS is not achievable within the expected ten-year lifespan of the pLWRP.

13. The suggested guidelines are outlined below:

    - If the current SoE site is below the national bottom line for an attribute (that means the site or river is currently in the D- or E-band), the minimum goal in the NPS-FM is to achieve at least the C-band within ~~the expected ten-year lifespan of the pLWRP~~ the given timeframe of the

[2] The target attribute state for the value human contact must be set above the baseline state of that attribute, unless the baseline state is already within the A band of Tables 9 or 10 in Appendix 2A of the NPS-FM, as applicable.

3 Clause 1.4 of the NPS-FM defines baseline state, in relation to an attribute, as:

the best state out of the following:
(a) the state of the attribute on the date it is first identified by a regional council under clause 3.10(1)(b) or (c)
(b) the state of the attribute on the date on which a regional council set a freshwater objective for the attribute under the National Policy Statement for Freshwater Management 2014 (as amended in 2017)
(c) the state of the attribute on 7 September 2017

[4] Some exceptions apply. See clauses 3.31, 3.32, and 3.33 of the NPS-FM.

vision (i.e. above the national bottom line).[5] This applies particularly for the attributes of E. Coli due to human health risks and Dissolved Reactive Phosphorus (DRP) and Macroinvertebrate Community Index (MCI) for ecosystem health.

- If the current state is above the national bottom line and the TAS would translate to an increase of two or more attribute bands, the interim target attribute band should be set as the median between the current and target attribute band. This means a site that is currently at the C-band and has a target A-band for any given attribute, should achieve the B-band for the given attribute within the expected ten-year lifespan of the pLWRP.
- If the current trend (20-year or 10-year) for any given attribute, at any given site, indicates that the state is decreasing, the interim target is to reverse the trend to an increasing direction.
- If a SOE site or river currently meets the suggested TAS, the TAS is to be maintained with no declining trend.

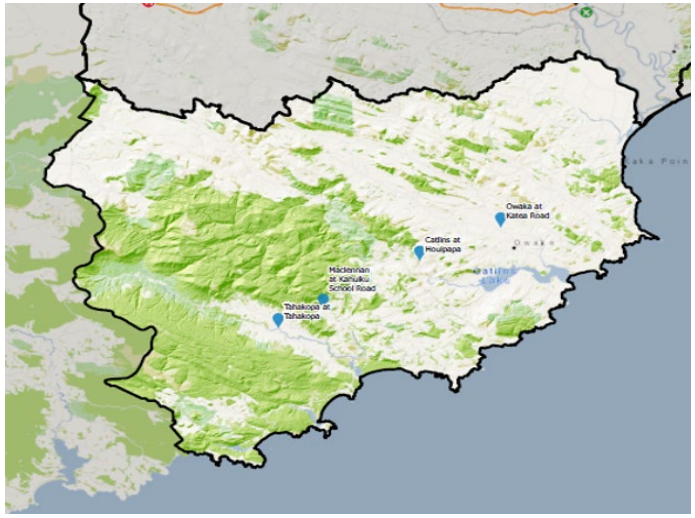
Key questions for the Governance Group

14. What are your views on aligning the timeframes for achieving the TASs with the timeframes for achieving the relevant long-term visions set in the pORPS?
15. What are you views on the proposed principles for setting interim TASs?

[5] Following presentation of this paper to the ORC's Environmental Science and Policy Committee on 25 May 2023, a correction was made to the paper.

CATLINS FMU

	Catlins at Houipapa						Maclennan at Kahuiku School Road						Owaka at Katea Road						Tahakopa at Tahakopa					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030
Nitrate-median	A		Improving	Degrading		A	A					A	B		Improving			A	A					A
Nitrate-Q95	A					A	A					A	B					A	A					A
Amonia	A		Improving	Improving		A	A					A	A		Improving			A	A					A
Clarity	D		Indeterminate	Degrading		A	D					A	D		Improving			A	D					A
E.Coli 260	B	B				A	A					A	D					A	D					A
E.Coli 540	C	B				A	C					A	D					A	D					A
E.Coli median	D	B	Improving	Degrading		A	A					A	D		Degrading			A	D					A
E.Coli Q95	D	B				A	B					A	D					A	D					A
DRP-median	C		Improving	Improving		B	B					B	C		Improving			B	B					B
DRP Q95	A					B	A					B	B					B	A					B
MCI	C	B				B	B					B	C		Indeterminate			B	C					B
ASPM	B	A				B	B					B	B					B	B					B
Chlorophyll a						B						B	C					B	B					B
Habitat						A						A	C					A	B					A
Ecosystem respiration													C						B					
FISH IBI						A						A	A					A						A

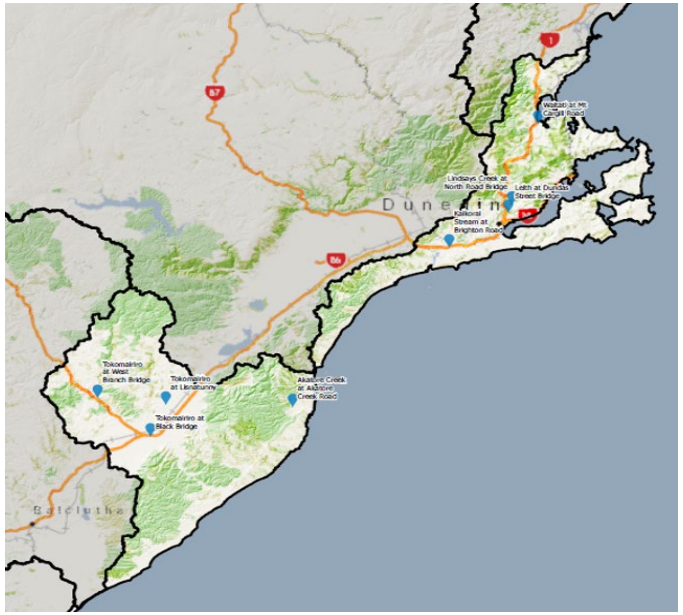


DUNEDIN & COAST FMU

	Kaikorai Stream at Brighton Road						Leith at Dundas Street Bridge						Lindsays Creek at North Road Bridge						Waitati at Mt Cargill Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040
Nitrate-median	A		Degrading			A	A		Improving	Degrading		A	A		Improving	Degrading		A	A			Degrading		A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	C		Degrading	Improving		A	A		Improving	Improving		A	A		Improving			A	A					A
Clarity	A		Degrading	Improving		B	A		Degrading	Improving		B	B	C	Improving			B	A					B
E.Coli 260	E					C	E					C	E					C	B					C
E.Coli 540	E					C	E					C	E					C	B					C
E.Coli median	E		Degrading	Degrading		C	E		Degrading	Degrading		C	E		Degrading			C	A					C
E.Coli Q95	D					C	D					C	D					C	B					C
DRP-median	B		Improving	Degrading		B	C		improving	Degrading		B	C		Improving			B	A					B
DRP Q95	B					B	B					B	B					B	A					B
MCI	D	D	Improving	Improving		C	D					C	D	D				C	D					C
ASPM	D	D				C	D					C	D	A				C	C					C
Chlorophyll a	D					C						C						C						C
Habitat	B					B						B						B						B
Ecosystem respiration																								
FISH IBI	A					A						A	B					A						A

	Tokomairiro at Blackbridge						Tokomairiro at Lisnatunny					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040
Nitrate-median	A		Degrading			A	A					A
Nitrate-Q95	B					A	A					A
Amonia	B		Degrading			A	A					A
Clarity	D		Degrading			B	A	A				B
E.Coli 260	E					C	E	D				C
E.Coli 540	E					C	D	C				C
E.Coli median	E		Degrading			C	E	D				C
E.Coli Q95	D					C	D	D				C
DRP-median	C	D	Improving			B	B					B
DRP Q95	C					B	B					B
MCI	C					C						C
ASPM	C					C						C
Chlorophyll a						C						C
Habitat						B						B
Ecosystem respiration												
FISH IBI						A						A

	Tokomairiro at West Branch Bridge						Akatore Creek at Akatore Creek Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2040
Nitrate-median	A		Improving			A	A					A
Nitrate-Q95	A					A	B					A
Amonia	A		Improving	Improving		A	A					A
Clarity	A		Improving	Improving		B	A					B
E.Coli 260	D					C	A					C
E.Coli 540	D					C	C					C
E.Coli median	D		Improving	Degrading		C	A					C
E.Coli Q95	D					C	D					C
DRP-median	B	C	Improving	Degrading		B	A					B
DRP Q95	A					B	A					B
MCI	C		Improving	Improving		C	C					C
ASPM	B					C	B					C
Chlorophyll a	C					C	B					C
Habitat	B					B	C					B
Ecosystem respiration	C						B					
FISH IBI						A						A



NORTH OTAGO FMU

	Awamoko at SH83						Kakaho Creek at SH1					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			A	A					A
Nitrate-Q95	A					A	A					A
Amonia	B		Improving			A	B					A
Clarity	A		Improving			A	A					A
E.Coli 260	D					A	D					A
E.Coli 540	D					A	D					A
E.Coli median	D		Improving			A	D					A
E.Coli Q95	D					A	D					A
DRP-median	D		Degrading			B	D					B
DRP Q95	D					B	D					B
MCI	D					C						C
ASPM	D					C						C
Chlorophyll a						B						B
Habitat						A						A
Ecosystem respiration						C						C
FISH IBI						A						A

	Kakanui at Clifton Falls Bridge						Kakanui at McCones					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			A	A		Degrading	Degrading		A
Nitrate-Q95	A					A	A					A
Amonia	A		Improving	Improving		A	A		Not Analysed	Improving		A
Clarity	A		Improving	Improving		A	A		Improving	Degrading		A
E.Coli 260	D					A	B					A
E.Coli 540	D	B				A	C					A
E.Coli median	D		Degrading	Degrading		A	A		Improving	Degrading		A
E.Coli Q95	C	B				A	D					A
DRP-median	A		Improving	Improving		B	A		Improving	Improving		B
DRP Q95	A					B	A					B
MCI	C	B				C	D	D	Improving	Improving		C
ASPM	C	B				C	C	B				C
Chlorophyll a	B					B	D					B
Habitat						A	B					A
Ecosystem respiration						C						C
FISH IBI	A					A	A					A

	Kauru at Ewings						Kawarau @ Chards Rd					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Improving	Degrading		A	A		Degrading	Improving		A
Nitrate-Q95	A					A	A					A
Amonia	A		Improving			A	A		Improving	Improving		A
Clarity	A					A	D		Degrading	Degrading		A
E.Coli 260	B					A	A					A
E.Coli 540	C					A	A					A
E.Coli median	A		Degrading	Degrading		A	A		Improving	Improving		A
E.Coli Q95	D					A	A					A
DRP-median	A		Improving			B	A		Improving	Improving		B
DRP Q95	A					B	A					B
MCI	B	B				C	C					C
ASPM	B	B				C	B					C
Chlorophyll a						B						B
Habitat						A						A
Ecosystem respiration						C						C
FISH IBI						A						A

	Oamaru Creek at SH1						Pleasant River at Patterson Road Ford					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A			Degrading		A	A					A
Nitrate-Q95	A					A	A					A
Amonia	B					A	A					A
Clarity	A					A	A					A
E.Coli 260	D					A	A					A
E.Coli 540	E					A	C					A
E.Coli median	D					A	A					A
E.Coli Q95	D					A	D					A
DRP-median	D					B	A					B
DRP Q95	D					B	A					B
MCI	D					C	D					C
ASPM	D					C	D					C
Chlorophyll a	D					B						B
Habitat	B					A						A
Ecosystem respiration	C					C						C
FISH IBI						A						A

	Shag at Craig Road						Shag at Goodwood Pump					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Improving			A	A		Improving	Degrading		A
Nitrate-Q95	A					A	A					A
Amonia	A		Improving	Improving		A	A		Improving	Improving		A
Clarity	A		Improving	Degrading		A	A		Improving	Degrading		A
E.Coli 260	A					A	B					A
E.Coli 540	B					A	C					A
E.Coli median	A		Improving	Improving		A	A		Degrading	Degrading		A
E.Coli Q95	B					A	C					A
DRP-median	A		Improving	Improving		B	A	B	Improving	Degrading		B
DRP Q95	A					B	A					B
MCI	C	C				C	D	D	Degrading	Degrading		C
ASPM	C	B				C	B	B				C
Chlorophyll a						B	D					B
Habitat						A	B					A
Ecosystem respiration						C	C					C
FISH IBI	A					A						A

	Trotters Creek at Mathesons						Upper Shag at SH85 Culvert					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading	Degrading		A	A			Degrading		A
Nitrate-Q95	A					A	A					A
Amonia	B	A	Degrading	Degrading		A	A					A
Clarity	A		Improving	Degrading		A	A					A
E.Coli 260	C					A	A					A
E.Coli 540	C					A	A					A
E.Coli median	D		Degrading	Degrading		A	A					A
E.Coli Q95	C					A	B					A
DRP-median	A		Improving			B	A					B
DRP Q95	A					B	A					B
MCI	D	D				C	B					C
ASPM	D	D				C	A					C
Chlorophyll a						B						B
Habitat						A						A
Ecosystem respiration						C						C
FISH IBI						A						A

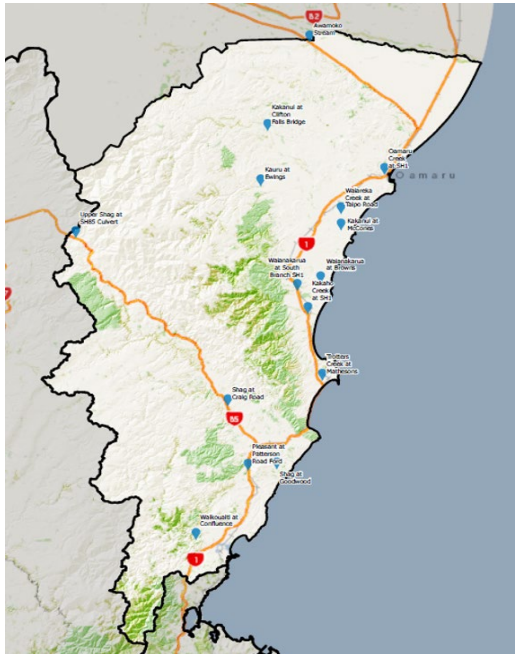
	Waianakarua at Browns					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			A
Nitrate-Q95	A					A
Amonia	A		Improving	Improving		A
Clarity	A		Improving	Degrading		A
E.Coli 260	B					A
E.Coli 540	C	A				A
E.Coli median	A		Degrading	Degrading		A
E.Coli Q95	D	A				A
DRP-median	A		Improving	Improving		B
DRP Q95	A					B
MCI	C	C	Degrading	Degrading		C
ASPM	B	B				C
Chlorophyll a	D					B
Habitat	B					A
Ecosystem respiration	A					C
FISH IBI	A					A

	Waianakarua at South Branch SH1					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A			Degrading		A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	A					A
E.Coli 260	A					A
E.Coli 540	C					A
E.Coli median	A					A
E.Coli Q95	D					A
DRP-median	A					B
DRP Q95	A					B
MCI	C					C
ASPM	B					C
Chlorophyll a						B
Habitat						A
Ecosystem respiration						C
FISH IBI						A

	Waiareka Creek at Taipo Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Improving			A
Nitrate-Q95	B					A
Amonia	B		Improving	Improving		A
Clarity	A		Improving	Degrading		A
E.Coli 260	D					A
E.Coli 540	D					A
E.Coli median	D		Improving	Degrading		A
E.Coli Q95	B					A
DRP-median	D		Degrading	Degrading		B
DRP Q95	D					B
MCI	D	D				C
ASPM	D	D				C
Chlorophyll a						B
Habitat						A
Ecosystem respiration						C
FISH IBI						A

	Waikouaiti at 200m d/s DCC intake					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A			Degrading		A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	A					A
E.Coli 260	A					A
E.Coli 540	A					A
E.Coli median	A					A
E.Coli Q95	A					A
DRP-median	A					B
DRP Q95	A					B
MCI						C
ASPM						C
Chlorophyll a						B
Habitat						A
Ecosystem respiration						C
FISH IBI	A					A

	Waikouaiti at Confluence d/s					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A					A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	A	A				A
E.Coli 260	A	A				A
E.Coli 540	B	A				A
E.Coli median	A	A				A
E.Coli Q95	D	A				A
DRP-median	A					B
DRP Q95	A					B
MCI	C	D				C
ASPM	D					C
Chlorophyll a						B
Habitat						A
Ecosystem respiration						C
FISH IBI						A



TAIERI FMU

	Contour Channel at No. 4 Bridge						Deep Stream at SH87						Kye Burn at SH85 Bridge						Meggat Burn at Berwick Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			A	A		Not Analysed			A	A		Degrading			A	A			Degrading		A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	B		Improving			A	A	B	Improving			A	A		Improving	Improving		A	A					A
Clarity	D		Degrading			B	A		Improving			B	A	C	Improving			B	D					B
E.Coli 260	E					A	A					A	A					A	C					A
E.Coli 540	E					A	A					A	A					A	C					A
E.Coli median	E		Degrading			A	A		Degrading			A	A		Degrading	Degrading		A	D					A
E.Coli Q95	D					A	A					A	A					A	C					A
DRP-median	C	D	Improving			B	A		Improving			B	A		Improving	Improving		B	B					B
DRP Q95	D	D				B	A					B	A					B	A					B
MCI	D					C	C					C	C	C	Degrading			C	D					C
ASPM	D					C	B					C	B	B				C	D					C
Chlorophyll a						B						B	A					B						B
Habitat						B						B	B					B						B
Ecosystem respiration						C						C						C						C
FISH IBI						B						B	C					B						B

	Nenthorn at Mt Stoker Road						Silverstream at Taieri Depot						Silverstream at Three Mile Hill Road						Sutton Stream at SH87					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Not Analysed			A	A		Indeterminate			A	A			Degrading		A	A					A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A		Improving			A	B		Improving	Improving		A	A					A	A					A
Clarity	A		Improving			B	A		Improving	Improving		B	A					B	A					B
E.Coli 260	A					A	C					A	A					A	D					A
E.Coli 540	A					A	D	B				A	B					A	C					A
E.Coli median	A		Degrading			A	D	D	Degrading	Degrading		A	A					A	D					A
E.Coli Q95	A					A	D					A	B					A	B					A
DRP-median	A		Improving			B	A		Improving	Improving		B	A					B	A					B
DRP Q95	A					B	B	A				B	A					B	A					B
MCI	D					C	D	D	Degrading	Degrading		C	C					C	C					C
ASPM	D					C	C					C	D					C	B					C
Chlorophyll a						B	D					B						B						B
Habitat						B	B					B						B						B
Ecosystem respiration						C	B					C						C						C
FISH IBI						B						B						B						B

	Taieri at Allanton Bridge						Taieri at Linnburn Runs Road						Taieri at Outram						Taieri at Stonehenge					
	Current State	Baseline 2017	10y Trend	20y Trend	Interim Target	Target 2050	Current State	Baseline 2017	10y Trend	20y Trend	Interim Target	Target 2050	Current State	Baseline 2017	10y Trend	20y Trend	Interim Target	Target 2050	Current State	Baseline 2017	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Improving			A	A		Not Analysed	Degrading		A	A		Improving	Not Analysed		A	A		Degrading			A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A		Improving	Improving		A	A		Improving	Improving		A	A		Improving			A	A		Degrading	Improving		A
Clarity	D		Improving	Degrading		B	B	C	Improving	Degrading		B	C		Improving			B	B	C	Improving	Degrading		B
E.Coli 260	B					A	A	B				A	A					A	A					A
E.Coli 540	C					A	B					A	B					A	A					A
E.Coli median	A		Degrading	Degrading		A	A		Degrading	Degrading		A	A		Degrading			A	A		Improving	Degrading		A
E.Coli Q95	D	B				A	B					A	A					A	A					A
DRP-median	B	C	Improving	Degrading		B	A		Improving	Improving		B	B		Improving			B	A	B	Improving	Degrading		B
DRP Q95	B					B	A					B	A					B	A					B
MCI	D					C	D					C	C					C	C					C
ASPM	D					C	C					C	B					C	B					C
Chlorophyll a						B						B	C					B						B
Habitat						B						B						B						B
Ecosystem respiration						C						C	C					C						C
FISH IBI						B						B						B						B

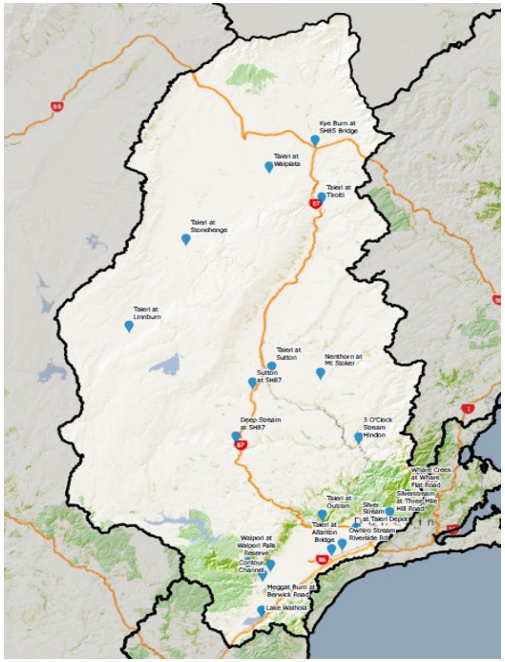
	Taieri at Sutton					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Improving	Degrading		A
Nitrate-Q95	A					A
Amonia	A		Improving	Improving		A
Clarity	D		Improving			B
E.Coli 260	B	B				A
E.Coli 540	C	C				A
E.Coli median	D		Degrading	Degrading		A
E.Coli Q95	C					A
DRP-median	B	C	Improving	Improving		B
DRP Q95	B	B				B
MCI	C					C
ASPM	B					C
Chlorophyll a	C					B
Habitat						B
Ecosystem respiration	B					C
FISH IBI						B

	Taieri at Tiroiti					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading	Degrading		A
Nitrate-Q95	A					A
Amonia	A		Improving			A
Clarity	D		Improving			B
E.Coli 260	A					A
E.Coli 540	A					A
E.Coli median	A		Improving			A
E.Coli Q95	A					A
DRP-median	C		Improving			B
DRP Q95	C					B
MCI	C					C
ASPM	C					C
Chlorophyll a						B
Habitat						B
Ecosystem respiration						C
FISH IBI						B

	Taieri at Waipiata					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Improving			A
Nitrate-Q95	A					A
Amonia	A		Degrading	Improving		A
Clarity	D		Improving	Improving		B
E.Coli 260	A	B				A
E.Coli 540	B	C				A
E.Coli median	A		Improving	Degrading		A
E.Coli Q95	B					A
DRP-median	C	D	Improving	Degrading		B
DRP Q95	C	D				B
MCI	C					C
ASPM	B					C
Chlorophyll a	A					B
Habitat						B
Ecosystem respiration	B					C
FISH IBI						B

	Waipori at Waipori Falls Reserve					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading	Degrading		A
Nitrate-Q95	A					A
Amonia	A		Improving	Improving		A
Clarity	D		Improving	Improving		B
E.Coli 260	A					A
E.Coli 540	A					A
E.Coli median	A		Indeterminat	Degrading		A
E.Coli Q95	A					A
DRP-median	A		Degrading	Not Analysed		B
DRP Q95	A					B
MCI	C	C				C
ASPM	C					C
Chlorophyll a						B
Habitat						B
Ecosystem respiration						C
FISH IBI						B

	Whare Creek at Whare Flat Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A			Improving		A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	A					B
E.Coli 260	A					A
E.Coli 540	A					A
E.Coli median	A					A
E.Coli Q95	A					A
DRP-median	A					B
DRP Q95	A					B
MCI	B					C
ASPM	B					C
Chlorophyll a						B
Habitat						B
Ecosystem respiration						C
FISH IBI						B



DUNSTAN ROHE

	Arrow at Arrow Gorge Track					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median						A
Nitrate-Q95						A
Amonia						A
Clarity						B
E.Coli 260						C
E.Coli 540						C
E.Coli median						C
E.Coli Q95						C
DRP-median						B
DRP Q95						B
MCI						C
ASPM						C
Chlorophyll a						C
Habitat						B
Ecosystem respiration	A					
FISH IBI						A

	Arrow at Morven Ferry Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A					A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	B					B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A					C
E.Coli Q95	A					C
DRP-median	A					B
DRP Q95	A					B
MCI	B					C
ASPM	B					C
Chlorophyll a	A					C
Habitat	A					B
Ecosystem respiration	A					
FISH IBI						A

	Bannockburn at Lake Dunstan					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Improving			A
Nitrate-Q95	A					A
Amonia	A		Not Analysed			A
Clarity	A		Degrading			B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A		Degrading			C
E.Coli Q95	A					C
DRP-median	A		Improving			B
DRP Q95	A					B
MCI	C					C
ASPM	B					C
Chlorophyll a						C
Habitat						B
Ecosystem respiration						
FISH IBI						A

	Cardrona at Mt Barker					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Degrading			A
Nitrate-Q95	A					A
Amonia	A		Improving	Improving		A
Clarity	D	B	Degrading	Degrading		B
E.Coli 260	A					C
E.Coli 540	B					C
E.Coli median	A		Degrading	Degrading		C
E.Coli Q95	B					C
DRP-median	A		Improving	Improving		B
DRP Q95	A					B
MCI	C	C	Degrading	Improving		C
ASPM	B					C
Chlorophyll a	B					C
Habitat	A					B
Ecosystem respiration	A					
FISH IBI	A					A

	Clutha at Luggate Bridge					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A	A	Degrading	Improving		A
Nitrate-Q95	A	A				A
Amonia	A	A	Improving	Improving		A
Clarity	A		Improving	Improving		B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A		Improving	Improving		C
E.Coli Q95	A					C
DRP-median	A	B	Improving	Improving		B
DRP Q95	A	B				B
MCI	D					C
ASPM	D					C
Chlorophyll a						C
Habitat						B
Ecosystem respiration						
FISH IBI						A

	Lindis at Ardgour Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Improving			A
Nitrate-Q95	A					A
Amonia	A		Improving	Not Analysed		A
Clarity	C	B	Improving	Degrading		B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A		Degrading	Degrading		C
E.Coli Q95	A					C
DRP-median	A		Improving	Improving		B
DRP Q95	A					B
MCI	C	C	Improving	Improving		C
ASPM	B					C
Chlorophyll a	B					C
Habitat	A					B
Ecosystem respiration						
FISH IBI	C					A

	Lindis at Lindis Peak					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Degrading	Improving		A
Nitrate-Q95	A					A
Amonia	A		Not Analysed	Not Analysed		A
Clarity	D	C	Degrading	Degrading		B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A		Degrading	Degrading		C
E.Coli Q95	A					C
DRP-median	A		Improving	Improving		B
DRP Q95	A					B
MCI	C					C
ASPM	B					C
Chlorophyll a						C
Habitat						B
Ecosystem respiration						
FISH IBI	B					A

	Luggate Creek at SH6 Bridge					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Degrading			A
Nitrate-Q95	A					A
Amonia	A		Improving	Improving		A
Clarity	A		Degrading	Degrading		B
E.Coli 260	A					C
E.Coli 540	B					C
E.Coli median	A		Degrading	Degrading		C
E.Coli Q95	B					C
DRP-median	B	C	Improving			B
DRP Q95	A					B
MCI	C	C	Indeterminate	Improving		C
ASPM	B					C
Chlorophyll a	B					C
Habitat	A					B
Ecosystem respiration	A					
FISH IBI	D					A

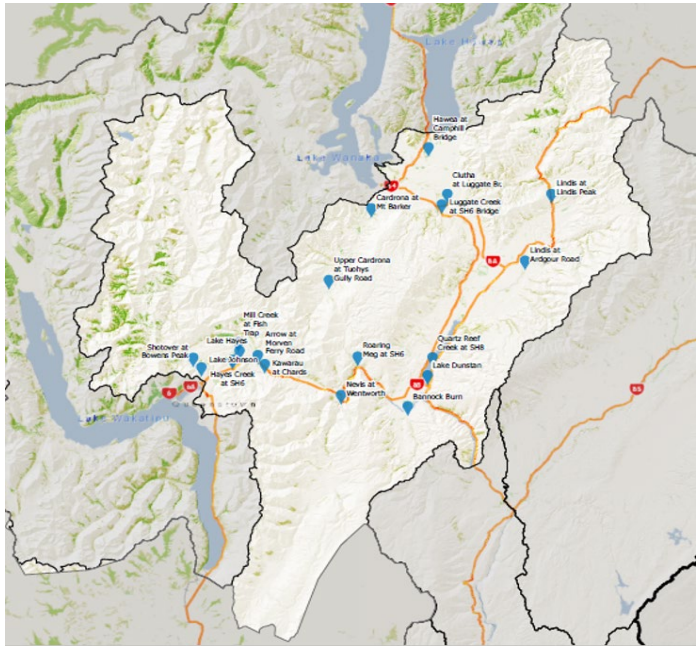
	Mill Creek at Fish Trap					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Degrading			A
Nitrate-Q95	A					A
Amonia	B	B	Not Analysed	Not Analysed		A
Clarity	D		Degrading	Degrading		B
E.Coli 260	B	C				C
E.Coli 540	C					C
E.Coli median	A	D	Improving	Indeterminate		C
E.Coli Q95	D					C
DRP-median	A		Improving	Improving		B
DRP Q95	A					B
MCI	D	D				C
ASPM	C					C
Chlorophyll a						C
Habitat						B
Ecosystem respiration						
FISH IBI	A					A

	Nevis at Wentworth Station					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Improving			A
Nitrate-Q95	A					A
Amonia	A		Improving			A
Clarity	A		Improving			B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A		Degrading			C
E.Coli Q95	A					C
DRP-median	A		Improving			B
DRP Q95	A					B
MCI	C					C
ASPM	B					C
Chlorophyll a						C
Habitat						B
Ecosystem respiration						
FISH IBI						A

	Quartz Reef Creek at SH8					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A					A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	C					B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A					C
E.Coli Q95	A					C
DRP-median	A					B
DRP Q95	A					B
MCI	C					C
ASPM	B					C
Chlorophyll a						C
Habitat						B
Ecosystem respiration						
FISH IBI						A

	Roaring Meg at SH6					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A					A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	A					B
E.Coli 260	A					C
E.Coli 540	A					C
E.Coli median	A					C
E.Coli Q95	A					C
DRP-median	B					B
DRP Q95	A					B
MCI	C					C
ASPM	B					C
Chlorophyll a						C
Habitat						B
Ecosystem respiration						
FISH IBI						A

	Shotover at Bowens Peak						Upper Cardrona at Tuohys Gully Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A	A	Improving			A	A					A
Nitrate-Q95	A	A				A	A					A
Amonia	A	A	Improving	Improving		A	A					A
Clarity	D		Degrading	Degrading		B	B					B
E.Coli 260	A					C	A					C
E.Coli 540	A					C	A					C
E.Coli median	A		Improving	Improving		C	A					C
E.Coli Q95	A					C	B					C
DRP-median	A	B	Improving	Improving		B	A					B
DRP Q95	A	A				B	A					B
MCI	C					C	C					C
ASPM	B					C	B					C
Chlorophyll a						C						C
Habitat						B						B
Ecosystem respiration												
FISH IBI						A						A



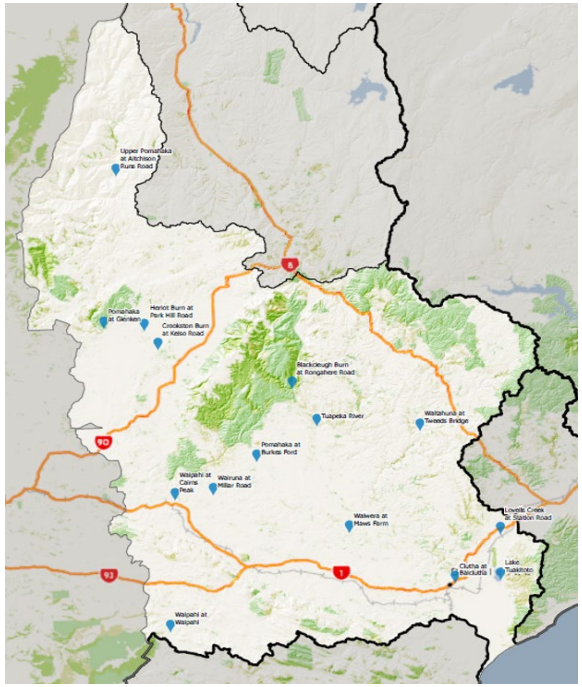
LOWER CLUTHA ROHE

	Blackcleugh Burn at Rongahere Road						Clutha at Balclutha						Crookston Burn at Kelso Road						Heriot Burn at Park Hill Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A					A	A		Degrading	Degrading		A	B		Improving			A	B		Improving	Degrading		A
Nitrate-Q95	A					A	A					A	B					A	B					A
Amonia	A					A	A		Improving	Degrading		A	B		Improving	Improving		A	A		Improving	Improving		A
Clarity	A					B	D		Improving	Degrading		B	D		Degrading	Degrading		B	D		Improving	Degrading		B
E.Coli 260	A					A	A					A	E					A	E					A
E.Coli 540	A					A	B					A	E					A	E					A
E.Coli median	A					A	A		Degrading	Degrading		A	E		Improving			A	E		Improving	Degrading		A
E.Coli Q95	A					A	D					A	D					A	D					A
DRP-median	C					B	A		Improving	Improving		B	D		Degrading	Degrading		B	D		Improving	Degrading		B
DRP Q95	A					B	A					B	D					B	C					B
MCI	B					C	D					C	D					C	C	C				C
ASPM	B					C	D					C	D					C	B	B				C
Chlorophyll a	A					C						C						C						C
Habitat	A					B						B						B						B
Ecosystem respiration	D					C						C						C						C
FISH IBI						B						B						B	A					B

	Lovells Creek at Station Road						Pomahaka at Burkes Ford						Pomahaka at Glenken						Tuapeka at 700m u/s bridge					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	B		Degrading	Degrading		A	A		Improving			A	A		Improving	Degrading		A	A					A
Nitrate-Q95	C					A	B					A	A					A	A					A
Amonia	A		Improving			A	A		Improving	Improving		A	A	D	Improving	Improving		A	A					A
Clarity	C		Improving			B	D		Improving	Degrading		B	C	D	Improving	Degrading		B	C					B
E.Coli 260	E	E				A	B					A	D	C				A	D					A
E.Coli 540	E					A	C					A	B					A	D					A
E.Coli median	E	E	Improving			A	A		Degrading	Degrading		A	D		Improving	Degrading		A	D					A
E.Coli Q95	D					A	D					A	B					A	D					A
DRP-median	B	C	Improving			B	C		Improving	Degrading		B	A		Improving	Improving		B	D					B
DRP Q95	C					B	B					B	A					B	C					B
MCI	D					C	D					C	B					C	C					C
ASPM	D					C	C					C	B					C	C					C
Chlorophyll a						C						C						C						C
Habitat						B						B						B						B
Ecosystem respiration						C						C						C						C
FISH IBI						B						B						B						B

	Upper Pomahaka at Aitchison Runs Road						Waipahi at Cairns Peak						Waipahi at Waipahi						Wairuna at Millar Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A					A	A		Improving			A	B		Improving	Degrading		A	B		Degrading	Degrading		A
Nitrate-Q95	A					A	B					A	B					A	C					A
Amonia	A					A	A		Improving	Improving		A	A		Improving	Improving		A	B		Improving			A
Clarity	A					B	D		Improving	Improving		B	A		Improving	Improving		B	D		Improving			B
E.Coli 260	A					A	D					A	D					A	E					A
E.Coli 540	A					A	D	E				A	C	C				A	E					A
E.Coli median	A					A	D		Improving	Improving		A	D		Degrading	Degrading		A	E		Improving			A
E.Coli Q95	A					A	D					A	D	D				A	D					A
DRP-median	A					B	C		Improving	Improving		B	C	C	Improving	Degrading		B	D		Improving			B
DRP Q95	A					B	C	B				B	C					B	D					B
MCI	B					C	C	C				C	D	D	Degrading	Degrading		C	D	D				C
ASPM	B					C	C	C				C	D	C				C	D					C
Chlorophyll a	A					C						C	D					C						C
Habitat	C					B						B	C					B						B
Ecosystem respiration	C					C						C	C					C						C
FISH IBI						B	A					B						B	A					B

	Waitahuna at Tweeds Bridge						Waiwera at Clutha confluence u/s 1km						Waiwera at Maws Farm					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Improving			A						A	A		Improving			A
Nitrate-Q95	A					A						A	B					A
Amonia	B		Improving	Improving		A						A	B	B	Improving			A
Clarity	C		Improving	Degrading		B						B	A		Improving			B
E.Coli 260	E					A						A	D	C				A
E.Coli 540	E	C				A						A	D					A
E.Coli median	E		Improving	Degrading		A						A	D		Improving			A
E.Coli Q95	D					A						A	D					A
DRP-median	C		Improving	Degrading		B						B	D		Degrading			B
DRP Q95	C					B						B	D					B
MCI	C	B	Degrading	Degrading		C	D	D				C	C					C
ASPM	B	C				C	D	D				C	C					C
Chlorophyll a	A					C						C						C
Habitat	C					B						B						B
Ecosystem respiration	C					C						C						C
FISH IBI						B						B						B



MANUHEREKIA ROHE

	Dunstan at St Bathans Loop Rd					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A					
Nitrate-Q95	A					
Amonia	A					
Clarity	B					
E.Coli 260	A					
E.Coli 540	A					
E.Coli median	A					
E.Coli Q95	A					
DRP-median	B					
DRP Q95	B					
MCI	C					
ASPM	C					
Chlorophyll a	C					
Habitat	B					
Ecosystem respiration	C					
FISH IBI	B					

	Dunstan Creek at Beattie Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			
Nitrate-Q95	A					
Amonia	A		Improving	Improving		
Clarity	A		Improving	Degrading		
E.Coli 260	A					
E.Coli 540	B	A				
E.Coli median	A		Degrading	Degrading		
E.Coli Q95	B	A				
DRP-median	A		Improving	Improving		
DRP Q95	A					
MCI	B	C	Improving			
ASPM	A					
Chlorophyll a	A					
Habitat	A					
Ecosystem respiration	B					
FISH IBI	A					

	Hills Creek at SH85					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A			Degrading		
Nitrate-Q95	A					
Amonia	B					
Clarity	B					
E.Coli 260	B					
E.Coli 540	C					
E.Coli median	A					
E.Coli Q95	B					
DRP-median	A					
DRP Q95	A					
MCI	D					
ASPM	D					

	Manuherikia at Blackstone Hill					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			
Nitrate-Q95	A					
Amonia	A		Improving			
Clarity	D		Degrading			
E.Coli 260	A					
E.Coli 540	B					
E.Coli median	A		Improving			
E.Coli Q95	B					
DRP-median	A		Improving			
DRP Q95	A					
MCI	C		Improving			
ASPM	B					
Chlorophyll a	B					
Habitat	B					
Ecosystem respiration	B					
FISH IBI						

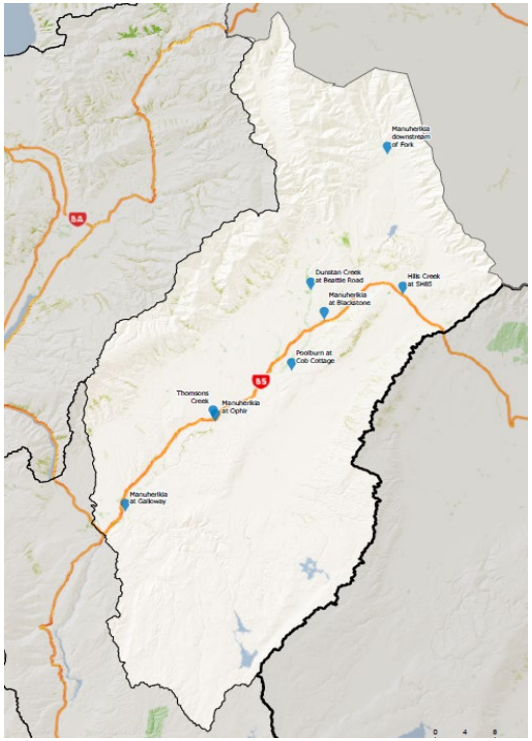
	Manuherikia at Galloway					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			
Nitrate-Q95	A					
Amonia	A		Improving	Improving		
Clarity	D		Degrading	Degrading		
E.Coli 260	B					
E.Coli 540	C	B				
E.Coli median	A		Degrading	Degrading		
E.Coli Q95	D	B				
DRP-median	B	C	Improving	Improving		
DRP Q95	B					
MCI	C					
ASPM	B					
Chlorophyll a	B					
Habitat	B					
Ecosystem respiration						
FISH IBI						

	Manuherikia at Ophir					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading	Degrading		
Nitrate-Q95	A					
Amonia	A		Improving	Degrading		
Clarity	D		Degrading	Degrading		
E.Coli 260	D					
E.Coli 540	D					
E.Coli median	D		Degrading	Degrading		
E.Coli Q95	D	B				
DRP-median	C		Improving	Improving		
DRP Q95	C					
MCI	B		Improving			
ASPM	B					
Chlorophyll a	B					
Habitat	B					
Ecosystem respiration	C					
FISH IBI						

	Manuherikia downstream of Fork					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A			Degrading		
Nitrate-Q95	A					
Amonia	A					
Clarity	A					
E.Coli 260	A					
E.Coli 540	A					
E.Coli median	A					
E.Coli Q95	A					
DRP-median	A					
DRP Q95	A					
MCI	B					
ASPM	B					

	Poolburn at Cob Cottage					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A			Improving		
Nitrate-Q95	A					
Amonia	A					
Clarity	D					
E.Coli 260	D					
E.Coli 540	C					
E.Coli median	D					
E.Coli Q95	D					
DRP-median	D					
DRP Q95	D					
MCI	C					
ASPM	B					

	Thomsons Creek at SH85					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2050
Nitrate-median	A		Degrading			
Nitrate-Q95	A					
Amonia	B		Improving			
Clarity	D		Degrading			
E.Coli 260	E					
E.Coli 540	E					
E.Coli median	E		Indeterminate			
E.Coli Q95	D					
DRP-median	D		Improving			
DRP Q95	D					
MCI	D					
ASPM	D					
Chlorophyll a						
Habitat						
Ecosystem respiration						
FISH IBI	B					


Manuherikia downstream of Fork
Dunstan Creek at Beattie Road
Hills Creek at Swin5
Manuherikia at Blackstone
Poolburn at Cob Cottage
Thomsons Creek
Manuherikia at Ophir
Manuherikia at Galloway

ROXBURGH ROHE

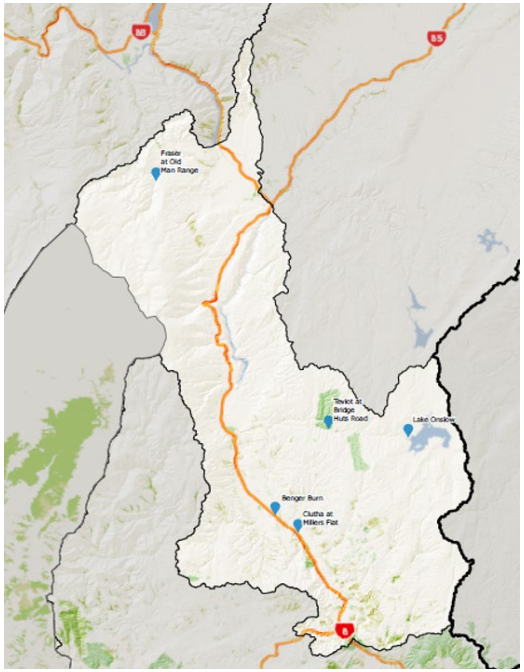
	Benger burn at Booths					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A					A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	D					A
E.Coli 260	D					A
E.Coli 540	D					A
E.Coli median	D					A
E.Coli Q95	D					A
DRP-median	C					A
DRP Q95	A					A
MCI	C					B
ASPM	B					B
Chlorophyll a						B
Habitat						B
Ecosystem respiration						A
FISH IBI						B

	Benger burn at SH8					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A					A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	B					A
E.Coli 260	A					A
E.Coli 540	B					A
E.Coli median	A					A
E.Coli Q95	D					A
DRP-median	C					A
DRP Q95	C					A
MCI						B
ASPM						B
Chlorophyll a						B
Habitat						B
Ecosystem respiration						A
FISH IBI						B

	Clutha at Millers Flat					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A		Improving	Degrading		A
Nitrate-Q95	A					A
Amonia	A		Improving	Degrading		A
Clarity	C	D	Improving	Degrading		A
E.Coli 260	A					A
E.Coli 540	A					A
E.Coli median	A		Degrading	Degrading		A
E.Coli Q95	A					A
DRP-median	A		Not Analysed	Not Analysed		A
DRP Q95	A					A
MCI	D					B
ASPM	D					B
Chlorophyll a						B
Habitat						B
Ecosystem respiration						A
FISH IBI						B

	Fraser at Old Man Range					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A			Degrading		A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	A					A
E.Coli 260	A					A
E.Coli 540	A					A
E.Coli median	A					A
E.Coli Q95	A					A
DRP-median	A					A
DRP Q95	A					A
MCI	C					B
ASPM	C					B
Chlorophyll a						B
Habitat						B
Ecosystem respiration						A
FISH IBI						B

	Teviot at Bridge Huts Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2045
Nitrate-median	A			Improving		A
Nitrate-Q95	A					A
Amonia	A					A
Clarity	D					A
E.Coli 260	A					A
E.Coli 540	A					A
E.Coli median	A					A
E.Coli Q95	B					A
DRP-median	A					A
DRP Q95	A					A
MCI	C					B
ASPM	C					B
Chlorophyll a						B
Habitat						B
Ecosystem respiration						A
FISH IBI						B



UPPER LAKES ROHE

	12 Mile Creek at Glenorchy Queenstown Road						25 Mile Creek at Glenorchy Queenstown Road						Alpha Burn at Glendhu Bay						Buckler Burn at Glenorchy Queenstown Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030
Nitrate-median	A					A	A					A	A					A	A					A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A					A	A					A						A	A					A
Clarity	A					A	A					A	A					A	B					A
E.Coli 260	A					A	A					A	D					A	A					A
E.Coli 540	A					A	A					A	D					A	A					A
E.Coli median	A					A	A					A	D					A	A					A
E.Coli Q95	A					A	A					A	D					A	A					A
DRP-median	A					A	A					A	A					A	A					A
DRP Q95	A					A	A					A	A					A	A					A
MCI	B					B	B					B						B	C					B
ASPM	B					B	B					B						B	C					B
Chlorophyll a	A					A	A					A						A						A
Habitat	A					A	A					A						A						A
Ecosystem respiration	B						A												A					
FISH IBI	A					B						B						B						B

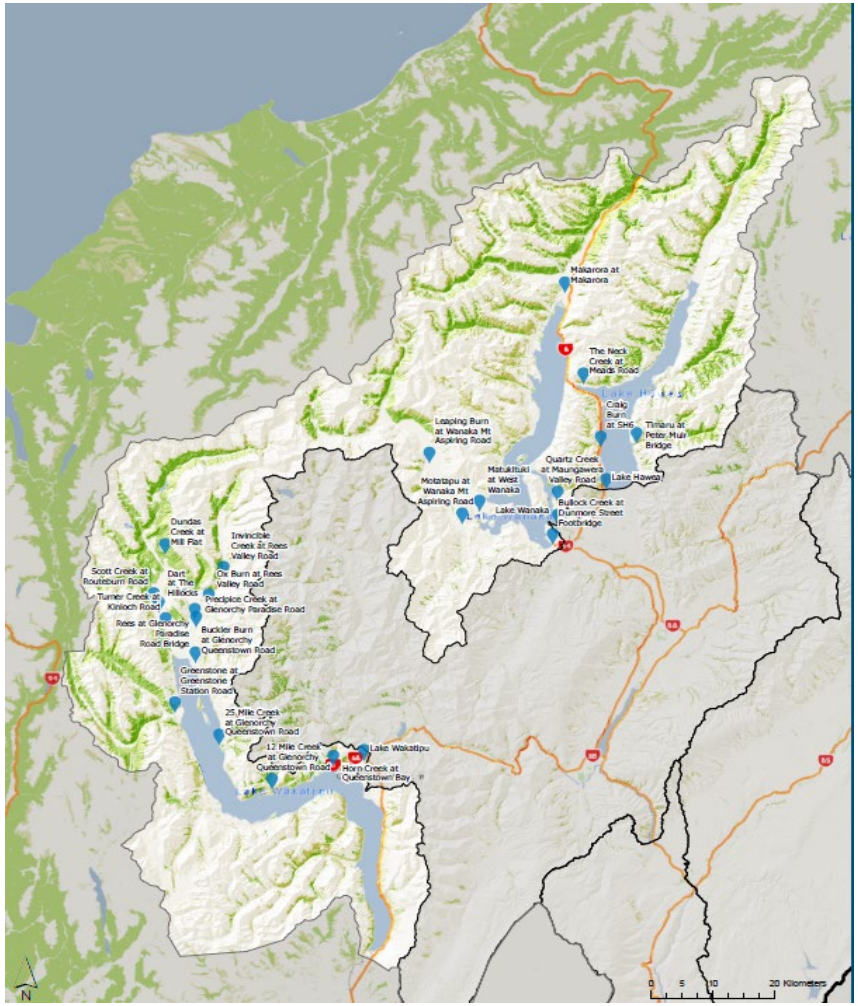
	Bullock Creek at Dunmore Street Footbridge						Craig Burn at SH6						Dart at The Hillocks						Dundas Creek at Mill Flat					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030
Nitrate-median	A					A	A			Improving		A	A		Degrading	Improving		A	A					A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A					A	A					A	A		Improving			A	A					A
Clarity	A					A	A					A	D		Improving			A	A					A
E.Coli 260	D					A	A					A	A					A	A					A
E.Coli 540	E					A	A					A	A					A	A					A
E.Coli median	D					A	A					A	A		Improving			A	A					A
E.Coli Q95	D					A	A					A	A					A	A					A
DRP-median	A					A	A					A	A		Improving			A	A					A
DRP Q95	A					A	A					A	A					A	A					A
MCI	C					B	D					B	B					B	B					B
ASPM	C					B	D					B	B					B	B					B
Chlorophyll a	D					A						A	A					A						A
Habitat	A					A						A	B					A						A
Ecosystem respiration	A												A											
FISH IBI						B						B						B	A					B

	Greenstone at Greenstone Station Road						Hawea at Camphill Bridge						Horn Creek at Queenstown Bay						Invincible Creek at Rees Valley Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030
Nitrate-median	A					A	A		Degrading			A	A					A	A					A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A					A	A		Improving	Degrading		A	B					A	A					A
Clarity	A					A	A		Improving	Degrading		A	B					A	A					A
E.Coli 260	A					A	A					A	B					A	A					A
E.Coli 540	A					A	A					A	B					A	A					A
E.Coli median	A					A	A		Improving	Indeterminate		A	A					A	A					A
E.Coli Q95	A					A	A					A	B					A	A					A
DRP-median	A					A	A		Not Analysed	Not Analysed		A	B					A	A					A
DRP Q95	A					A	A					A	A					A	A					A
MCI	B					B	D					B	D					B	B					B
ASPM	B					B	D					B	D					B	B					B
Chlorophyll a	A					A						A						A						A
Habitat	A					A						A						A						A
Ecosystem respiration	A																							
FISH IBI						B						B						B						B

	Leaping Burn at Wanaka Mt Aspiring Road						Makarora at Makarora						Matukituki at West Wanaka						Motatapu at Wanaka Mt Aspiring Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030
Nitrate-median	A					A	A			Degrading		A	A					A	A			Improving		A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A					A	A					A	A		Improving	Improving		A	A					A
Clarity	A					A	A					A	D		Degrading	Degrading		A	A					A
E.Coli 260	A					A	A					A	A					A	A					A
E.Coli 540	A					A	A					A	A	B				A	A					A
E.Coli median	A					A	A					A	A		Indeterminate	Degrading		A	A					A
E.Coli Q95	A					A	A					A	A	C				A	A					A
DRP-median	A					A	A					A	A		Improving	Not Analysed		A	A					A
DRP Q95	A					A	A					A	A					A	A					A
MCI	B					B	B					B	C					B	C					B
ASPM	B					B	B					B	B					B	B					B
Chlorophyll a						A						A	A					A	B					A
Habitat						A						A	B					A	B					A
Ecosystem respiration													A						A					
FISH IBI						B						B						B						B

	Ox Burn at Rees Valley Road						Precipice Creek at Glenorchy Paradise Road						Quartz Creek at Maungawera Valley Road						Rees at Glenorchy Paradise Road Bridge					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030
Nitrate-median	A					A	A					A	A					A	A					A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A					A	A					A	A					A	A					A
Clarity	B					A	A					A	A					A	D					A
E.Coli 260	A					A	A					A	A					A	A					A
E.Coli 540	A					A	A					A	B					A	A					A
E.Coli median	A					A	A					A	A					A	A					A
E.Coli Q95	A					A	A					A	B					A	A					A
DRP-median	A					A	A					A	A					A	A					A
DRP Q95	A					A	A					A	A					A	A					A
MCI	C					B	B					B	C					B	C					B
ASPM	B					B	C					B	C					B	B					B
Chlorophyll a						A	A					A						A						A
Habitat						A	B					A						A						A
Ecosystem respiration							A																	
FISH IBI						B						B						B						B

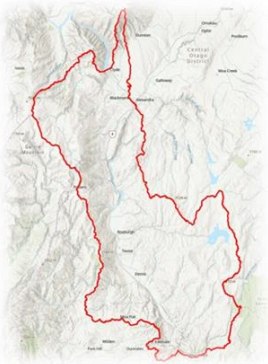
	Scott Creek at Routeburn Road						The Neck Creek at Meads Road						Timaru at Peter Muir Bridge						Turner Creek at Kinloch Road					
	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030	Current State	2017 Baseline	10y Trend	20y Trend	Interim Target	Target 2030
Nitrate-median	A					A	A					A	A					A	A					A
Nitrate-Q95	A					A	A					A	A					A	A					A
Amonia	A					A	A					A	A					A	A					A
Clarity	A					A	A					A	D					A	A					A
E.Coli 260	A					A	A					A	A					A	A					A
E.Coli 540	A					A	A					A	A					A	A					A
E.Coli median	A					A	A					A	A					A	A					A
E.Coli Q95	A					A	A					A	A					A	A					A
DRP-median	A					A	A					A	A					A	A					A
DRP Q95	A					A	A					A	A					A	A					A
MCI	C					B	C					B	B					B	B					B
ASPM	B					B	B					B	B					B	B					B
Chlorophyll a						A	A					A						A	B					A
Habitat						A	A					A						A	A					A
Ecosystem respiration							A												B					
FISH IBI						B						B						B						B


Makarora at Makarora
The Neck Creek at Meads Road
Cardrona at SH6
Timaru at Peter Muir Bridge
Leaping Burn at Wanaka Mt Aspiring Road
Quartz Creek at Maungawera Valley Road
Lake Hawea
Matukituki at West Wanaka
Motatapu at Wanaka Mt Aspiring Road
Lake Wanaka
Bullock Creek at Dunmore Street Footbridge
Dundas Creek at Mill Flat
Invincible Creek at Rees Valley Road
Scott Creek at Routeburn Road
Dart at The Hillocks
Ox Burn at Rees Valley Road
Turner Creek at Kinloch Road
Precipice Creek at Glenorchy Paradise Road
Rees at Glenorchy
Paradise Road Bridge
Buckler Burn at Glenorchy Queenstown Road
Greenstone at Greenstone Station Road
25 Mile Creek at Glenorchy Queenstown Road
12 Mile Creek at Glenorchy Queenstown Road
Lake Wakatipu
Horn Creek at Queenstown Bay
N
0 5 10 20 Kilometers

ATTACHMENT 6

Appendix 2: Summary overview of the key observations (monitoring results and trends) for different FMUs and rohe across the Otago region

FMU/Rohe	Key observations
Upper Lakes Rohe (Clutha Mata-Au FMU) 	Lakes and rivers typically have very good water quality, but issues with some contaminants, such as suspended sediments and periphyton, can be observed at a small number of sites Lakes Whakatipu, Wanaka and Hawea are all in very good condition but do show some degrading trends. Degrading trends for some for monitored sites can be observed (particularly around nitrate concentrations) Monitoring results suggest the impacts of land use change (e.g. urban growth).
Dunstan Rohe (Clutha Mata-Au FMU) 	Most monitoring sites, particularly in the upper catchments, show very good water quality. Lower parts of some catchments show poorer water quality. Trend analyses for monitored sites show: • Improving trends for ammoniacal nitrogen and phosphorus • Degrading trends for several parameters including nitrate over the last 10 years for approx. half of the sites Monitoring results are likely to show influences influenced by urban & agricultural land uses)
Manuherekia Rohe (Clutha Mata-Au FMU) 	Monitoring results show that DRP and total nitrogen concentrations are elevated and phosphorus concentrations are below the national bottom line at the Thomsons Creek and Pool Burn sites. Results for bacterial (E.coli) concentrations are also below the national bottom line at various sites. Periphyton levels are generally okay in the upper Manuherekia, but decrease to C Grade in lower reaches. On poorly drained soils (Thomsons Creek and Lauder Creek catchments) irrigation run-off is likely to contribute to low water quality due to high bacteria and nutrient levels. Historic gold mining works may be influencing results for suspended sediments in tributaries around Mata Creek.

FMU/Rohe	Key observations
Roxburgh Rohe (Clutha Mata-Au FMU) 	Water quality is generally good Trend analyses for monitored sites shows: • Improving trends for the Clutha Mata-Au at Millers Flat for most parameters over the last 10 years • Degrading trends for ammoniacal nitrogen and chlorophyll-a (algae) over the last 10 years Monitoring results reflect impact of land use change on water quality in tributaries of the Clutha Mata-Au (e.g. Benger Burn, Teviot River)
Lower Clutha Rohe (Clutha Mata-Au FMU) 	Water quality is generally degraded, with monitoring results showing high bacteria and nutrient levels. Lake Tuakitoto is supertrophic with high nutrient and algae levels, and poor water clarity Trend analyses for monitored sites show: • Degradation at many sites over the last 20 years • Fewer degrading and more improving trends Monitoring results suggests the likely impact of intensive land uses and tile drainage on poorly drained soils
North Otago FMU 	Water quality is degraded to varying degrees. All monitoring sites have at least one attribute which falls below the 'national bottom line" and bacterial water quality is severely degraded at about half of monitored sites Trends analyses show degrading trends for some parameters (particularly nitrogen) at most sites over both the 20-year and 10-year analysis period Monitoring results suggest the influence of higher intensity agricultural and urban land uses.
Catlins FMU	Suspended fine sediment and E. coli results do not meet the 'national bottom lines' at the Owaka River and Tahakopa River monitoring sites. Trend analysis results are mixed, but overall show degrading water quality

FMU/Rohe	Key observations
	
Dunedin and Coast FMU 	Monitoring results show that nutrient concentrations generally high, with half of the monitoring sites achieving a 'D' band, and other sites achieving a 'C' band) Bacterial water quality is severely degraded at all sites, except at the site on the Waitati River Trend analysis show there were more improving than degrading trends in the last 10 years Dunedin City monitoring sites show the impacts of a high level of urbanization (due to stormwater network with point source discharges)
Taieri FMU 	Monitoring results show that water quality is generally good with moderate nutrient levels recorded across most of the FMU. In some tributaries in the lower Taieri catchment water quality is degraded due to high bacteria and nutrient levels. Monitoring results for Lake Waihola shows high nutrient and algae levels, consistent with the lake's nutrient enriched/eutrophic state (episodic algae blooms) Trends analyses show many degrading trends across the FMU, particularly in the lower Taieri at Outram

ATTACHMENT 7

Land & Water Regional Plan Governance Group

Agenda item 2B: Farming activities and practices that are likely to impact on water quality

Purpose of this Paper

1. The purpose of this paper is to seek guidance from the Governance Group on suggested approaches for managing farming activities and practices which have been identified as likely to contribute to contaminants entering Otago's water bodies. It sits alongside two other papers that will be presented to the Governance Group: *Forestry activities and practices that are likely to impact on water quality* and *Managing discharges from wastewater and stormwater systems, industrial and trade waste discharges, and sediment discharges associated with earthworks*[1]. Together these papers cover the key ways to improve water quality across Otago.

Background

2. Various activities and practices that occur on farms have the potential to impact negatively on water quality, by contributing to contaminants entering water bodies[2]. Most of the discharges associated with farming activities and practices are diffuse or non-point source discharges, where contaminants reach water indirectly, for example by being discharged to land first and carried over land to water bodies or via loss through the soil profile to groundwater. This makes them complex to manage, but important due to their contribution to overall contaminant loads and their effect on the achievement of environmental outcomes in Freshwater Management Units (FMUs) and rohe.

Direction in Higher Order Planning Documents

3. Under the Resource Management Act 1991 (RMA), unless there is a relevant national environmental standard or regional plan rule permitting a discharge, all discharges of contaminants that enter or could enter water require resource consent[3]. Some activities may be more efficiently managed through permitted activity rules, and it is one of the roles of the proposed Land and Water Regional Plan (pLWRP) to determine at what threshold a resource consent should be required. One of the functions of regional councils under the RMA is control of the use of land for the purpose of, among other things, the maintenance and enhancement of the quality of water in water bodies and coastal water[4].

4. The Government announced the Essential Freshwater package in 2020. It has four main components:

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1 *Managing discharges from wastewater and stormwater systems, industrial and trade waste discharges, and sediment discharges associated with earthworks* is for noting only.

2 Discharges that are the topic of this paper are nitrogen, phosphorus, sediment and bacterial contaminants such as *E.coli.* Discharges of pesticides and herbicides, which are more associated with horticulture are addressed in other parts of the pLWRP.

3 Section 15 RMA

4 Section 30 RMA

a. The National Policy Statement for Freshwater Management 2020 (NPS-FM[5]) directs a key outcome for water quality: to improve degraded water bodies, maintain all other water bodies, or improve them if communities so choose. 'Degraded' water bodies are those that do not meet a prescribed national bottom line, or if a target attribute state (TAS) has been set, are not achieving it[6]. The NPS-FM also requires that the condition of waterbodies and freshwater ecosystems are systematically monitored over time, and action is taken where freshwater is degraded, and to reverse deteriorating trends[7].

b. The National Environmental Standards for Freshwater 2020 (NES-F) are regulations relevant to managing nutrients from agricultural activities and discharges of synthetic nitrogen fertiliser. Some of these, such as the regulations that manage intensification of farming activities, expire when the Council notifies its plan.

c. The Resource Management (Stock Exclusion) Regulations 2020 require the exclusion of stock from specified wetlands, lakes, and rivers more than one metre wide progressively over the next two years.

d. Freshwater Farm Plans (FW-FPs) standardise farm plans under a national framework, to be administered by regional councils. The regulations are expected shortly, with implementation likely to commence in Otago in late 2023.

5. The Freshwater section of the proposed Otago Regional Policy Statement 2021 (pORPS) contains specific direction on the management of freshwater. The long-term visions contained in the pORPS were developed in consultation with communities and tangata whenua. Overall, the visions for each FMU/Rohe reflect a desire for healthy water bodies with functioning ecosystems, including natural flows and wetlands, that provide for indigenous species. Water that is safe for human contact and supports thriving mahika kai is important, and land and water management practices are integrated (ki uta ki tai) and sustainable to protect te mana o te wai.

6. The long-term visions provide the timeframes and endpoint for achieving the outcomes described in these visions. Table 1 below shows the proposed timeframes set to achieve the visions. Some of these are short-term, and require full achievement or near full achievement of the visions through the current planning process. These timeframes are subject to submissions on the pORPS.

Table 1: Freshwater vision timeframes for FMU/Rohe as stated in the pORPS

FMU/Rohe	Timeframe
Catlins FMU	2030
Upper Lakes Rohe	2030
Dunedin and Coast FMU	2040
Dunstan, Roxburgh and Lower Clutha Rohe	2045
North Otago FMU	2050
Taieri FMU	2050
Manuherekia Rohe	2050

[5] Policy 5 NPS-FM
[6] Clause 1.4 NPS-FM
[7] Policy 13 NPS-FM

Previous direction from Council and community and mana whenua aspirations

7. Previous direction from Council has been that the pLWRP should:[8]

    - Build on central government regulations, including the requirement to have freshwater farm plans.
    - Manage the water quality impacts of discharges caused by specific land uses by:
        - Considering the scale and intensity of environmental effects;
        - Considering the potential influence of weather events and changes to hydrological patterns on the land development.
    - Focus on mitigating the effects from discharged contaminants as well as reducing the volume of discharges.
    - Where possible manage activities though permitted activity status (subject to conditions) to avoid the need to apply for consent.
    - Set a framework that:
        - provides clear direction for farm plans (including on content and on outcomes that need to be achieved through the farm plans);
        - reinforces the effectiveness of farm plans as a regulatory tool;
        - ensures farm plans are focused on managing environmental effects, not on farming type.

8. Feedback received through community consultation and engagement with mana whenua undertaken over the period November 2021 to March 2023 that also aligns with national direction indicates a desire to:

    - Restore the health and natural functioning of freshwater bodies that are degraded or over-allocated;
    - Manage water in a manner that prioritises first the health and well-being of water bodies and freshwater ecosystems, second the health needs of people and third economic uses of water[9]; and
    - See the focus of management shift from mitigating the effects of contaminant discharges to dealing with the issues at source (i.e. reducing the levels of contaminants entering the system rather than responding once they are in the system).

9. Further consultation was undertaken in October and November 2022 on a range of modelled actions, classified as Good Management Practice (GMP), Good Management Practice Plus (GMP+) and Good Management Practice Plus Plus (GMP++), that could be undertaken to achieve the community outcomes[10]. The range of actions were considered as options that could be adopted on a farm to reduce nutrient loss and the modelling focussed on sheep and beef and dairy farming systems. Consultation was undertaken with the general community, as well as some key stakeholder sessions.

10. Feedback from the consultation workshops indicated general support for the outcomes, and a general acknowledgement that there is a need to ensure that Otago's rivers and lakes are in a healthy state. There was not agreement on the full suite of actions that were being

[8] https://www.orc.govt.nz/media/12595/agenda-strategy-and-planning-20220713.pdf page 397ff
[9] This is consistent with the hierarchy of obligations set under the NPSFM
[10] GMP, GMP+ and GMP++ were discussed in the Issues and Options paper that was presented to the Governance Group on 2 November 2022

workshopped, with an indication that some actions were already happening, some were not supported, and others that either do not apply to the Otago context or at least are not applicable region wide.

11. There was, however, general agreement at the workshops that FW-FPs will be an appropriate management tool, although they will likely not be in place throughout Otago for some time[11].

Potential actions to maintain or improve water quality

12. State of the Environment monitoring shows that there are some parts of Otago not meeting national bottom lines or target attribute states associated with community visions.

13. The actions that comprise GMP includes activities that are expected to be either already undertaken or to be implemented within individual farm environmental plans over the next 2-5 years. It includes a range of mitigation options for both dry stock and dairy farming systems. (GMP includes actions that are already required by central government regulation.)

14. Modelled results indicate that **it is unlikely that the GMP actions along with the government regulations will be sufficient to achieve much improvement in water quality**. It is more likely that GMP and restriction of intensification would 'hold the line' and arrest declining trends.

15. GMP+ includes mitigation activities in addition to GMP that could be applied by individual farmers to improve overall water quality outcomes for their farm and contribute to improvements at a catchment scale. Generally, GMP+ options are more difficult and/or expensive to implement.

16. GMP+ actions should achieve slightly more improvement but are unlikely to meet the community visions and target attribute states in several parts of the region, such as the Catlins, Lower Clutha, Lower Taieri and North Otago.

17. GMP++ actions begin to set out the longer term pathway towards wider scale land use change, such as limiting conversion of land to more intensive use, reducing stocking rates, retiring land and planting indigenous vegetation and restoring wetlands. The Issues and Options paper[12] indicated that these types of controls will not be included in the pLWRP at this stage. However, if they are to be implemented in the future, the pLWRP needs to signal this longer-term change in land use and prevent further intensification in the interim period so that resource users do not invest in establishing land uses in places where there are likely to be long-term constraints on resource availability.

18. Tools for managing farming outputs such as Overseer[13] and the Risk Index Tool currently being developed by MfE[14] are still some months away and are unlikely to be able to be used in this version of the pLWRP, and ultimately may not be suitable for use in rules in a plan.

19. FW-FP regulations are expected to be ready for rollout from mid-2023. The first regions for roll out are Southland and Waikato, with Otago being in the second tranche starting late 2023. FW-FPs are closely tied to GMP – that is what they are intended to achieve and manage, in a bespoke

[11] The FW-FP regulations are expected to start coming into effect from 2023, with full implementation across all regions expected to take several years. https://environment.govt.nz/news/freshwater-farm-plan-update-september-2022
[12] The Issues and Options paper was presented to the Governance Group on 2 November 2022
[13] Redevelopment programme is almost completed – validation work is underway (MfE Workshop 5 April 2023)
[14] The current "go-live" date for the Risk Index Tool is October-November 2023 (MfE Workshop 5 April 2023)

way for each farm. The pLWRP can make additions to Freshwater Farm Plans, but it is important for farmers to have just a single process and farm plan to prepare and comply with.

20. Non-regulatory tools continue to be used by the Council to encourage actions that improve water quality. The NPS-FM sets up specific requirements for Action Plans (see paragraph 31 below), to mesh together regulatory and non-regulatory actions.

Economic impacts of actions to maintain/improve water quality

21. It is recognised that that there will be economic impacts on Otago's farmers and growers as a result of the environmental actions required to maintain/improve water quality.

22. The Farmers and Growers workstream as part of the Economic Programme for the pLWRP has modelled the impact of environmental actions, including most of those proposed in this paper, on 56 case study businesses across the range of farm sectors, production systems and enterprises in Otago. It has found a diverse range of impacts will be experienced across different sectors, systems and enterprises, even for the same environmental action.

23. The results of the Farmer and Grower workstream provide evidence in support of tailored FW-FPs being economically efficient for farmers by responding to the diversity of Otago's farming and growing businesses. However, implementation and monitoring of tailored solutions is significantly more expensive than region-wide solutions, and therefore the balance between tailored and region-wide solutions needs to be found. Region-wide solutions also provide greater certainty and consistency in application.

Issue: What limits on resource use might be included in the pLWRP to maintain and improve water quality?

24. Both the NPS-FM[15] and the pORPS[16] require that there is no reduction in the health of Otago's water bodies and where those water bodies are degraded, they must be improved. The pORPS goes on to state that the pLWRP must include limits on resource use[17] that:

- Provide methods for improving water quality for water bodies that have been identified as degraded or overallocated,
- Control the effects of land use that have adverse impacts on water bodies,
- Manage the adverse effects on water bodies that can arise from the use and development of land.

25. There is no specific direction in the pORPS regarding what the limits on resource use might be and further direction is now sought from the Governance Group on possible actions to include in the pLWRP.

Available Planning Responses

26. The possible planning responses to maintain or improve water quality that could be included in the pLWRP includes a variety of tools. The specific package may vary for each FMU/Rohe

[15] Policy 11, NPS-FM
[16] Policy LF–FW–P7 pORPS
[17] Method LF-FW-M6 pORPS

depending on the level of degradation. An assessment of these actions is attached in Appendix One. The actions include :

a. Larger setbacks than those required by the NES-F and Stock Exclusion Regulations for high-risk activities, such as intensive winter grazing, pasture–based winter grazing, sacrifice paddocks, and intensively stocked land. Larger setbacks could also be required for a wider range of waterbodies, and for more sensitive waterbodies and natural wetlands, particularly in areas where sediment run-off and microbial contaminant risk is high. Larger setbacks often need longer implementation timeframes where fences already exist, due to the cost of shifting fencing.

b. Further restrictions on feedlots/ feedpads/ stockholding areas. For example, standards for construction that require minimising nutrient loss to groundwater, including not locating it within 50 m of a waterbody or in a critical source area, and requiring effluent to be collected and applied to land in accordance with the effluent rules in the pLWRP.

c. Lower synthetic fertiliser cap than in the NES-F.

d. Restricting further intensification of land use. For example, no further expansion of dairy and intensive winter grazing, particularly where water is fully/over allocated or where water quality is degraded.

e. Controls/restrictions on cultivation (earthworks) based on slope, setbacks and sediment.

f. Adding specific management and grazing limits for critical source areas, as these are known to disproportionately contribute contaminants to waterbodies.

Freshwater Farm Plans

27. FW-FPs will be mandatory for farms over 20 hectares (or over 5 hectares if the farm is a horticultural land use) under Government Regulations. Including FW-FPs in the pLWRP will ensure there is a framework for FW-FPs in terms of outcomes that need to be achieved and the matters that need to be addressed. The FW-FPs will need to demonstrate how regulatory (national and regional) requirements are being met on farms.

Non-regulatory Methods

28. Regional councils are also required by the NPS-FM to prepare action plans for some target attribute states[18]. Action plans will sit alongside the pLWRP and will include non-regulatory measures to assist in achieving the environmental outcomes. It is planned to start developing the first catchment action plan later in 2023.

Key questions for the Governance Group

a. How far should we aim to go towards the desired water quality outcomes in the life span of the pLWRP? For example, is maintaining existing water quality and arresting declining trends enough, or do further actions need to be considered in order to see improvements?

b. Is there support for going further than GMP+? If so, what actions should be considered?

[18] Clause 3.12 and cl 3.15 NPSFM 2020

i. Should requirements for reductions in nutrient losses only be considered in FMU/ Rohe/ catchments identified as degraded or across the board?

ii. Should requirements for reductions in nutrient losses be primarily from those activities with the highest risk of losses or evenly applied across the board?

c. Which of the proposed input controls (outlined in paragraph 29 above) are acceptable to be included in the proposed LWRP in order to achieve the improvement required to meet the community outcomes and target attribute states?

d. In the longer-term (10-25yrs), further reductions in nutrient losses are going to be required to meet water quality targets in some areas. For example, land use change or land retirement. How clearly should this future direction be signalled in the Plan?

Appendix One: Assessment of Proposed Regulatory Methods

Method	Effectiveness	Social/Economic Impact
Setbacks		
Larger setbacks than those required by the NES-F (5 m) and Stock Exclusion Regulations (3 m) for high risk activities, such as intensive winter grazing, pasture–based winter grazing, sacrifice paddocks, intensively stocked land. Larger setbacks could also be required for a wider range of waterbodies, and for more sensitive waterbodies and natural wetlands, particularly in areas where sediment run-off and microbial contaminant risk is high.	Ten metre setbacks align with current research for protecting water quality. These measures could be introduced at an FMU level to provide a more tailored regulatory framework for catchments that have degraded water quality and require more stringent limits than the NES-F, which is more likely to be effective at meeting the environmental outcomes for water quality in the pLWRP.	Further restrictions will result in costs to land and water users in Otago and flow on economic impacts. These costs are currently being quantified but will vary significantly depending on the physical characteristics of a farm and the farming activity. However, a more tailored approach, targeting high risk activities and FMUs where water quality is degraded, will focus the costs in areas where improvement is most required.
Feedlots and stockholding areas		
Further restrictions on feedlots/ feedpads/ stockholding areas than those required by the NES-F[19]. For example, controls could include that they must be constructed to avoid nutrient loss to groundwater, effluent must be collected and applied to land in accordance with effluent rules, and not be located within 50 m of a waterbody or in a critical source area.	This method would fill in the gaps identified in the NES-F to protect water quality and increase the effectiveness in meeting the environmental outcomes for water quality in the pLWRP.	New requirements will result in additional costs for resource users to comply with new permitted activity rules and/or consent conditions.

[19] NES-F permitted activity conditions for small and young cattle only specify the age and size of the cattle. For larger and older cattle, there are conditions around the base area, managing effluent and distances from water bodies, bores, drains and the coastal marine area.

Method	Effectiveness	Social/Economic Impact
Application of fertiliser		
A lower synthetic nitrogen fertiliser cap than in the NES-F.	These measures could be introduced at an FMU level to provide a more tailored regulatory framework for catchments that have degraded water quality and require more stringent limits than the NES-F, which is more likely to be effective at meeting the environmental outcomes for water quality in the pLWRP.	Further restrictions will result in costs to some land and water users in Otago and flow on economic impacts. These are costs are currently being quantified but will vary significantly depending on the physical characteristics of a farm and the farming activity. However, a more tailored approach, targeting FMUs where water quality is degraded, will focus the costs in areas where improvement is most required.
Land use intensification		
No further intensification of land use. For example, the pLWRP could restrict any further expansion of dairy, either across the region or in areas where water is fully/over allocated or where water quality is degraded.	These measures could be introduced at an FMU level to provide a more tailored regulatory framework for catchments that have degraded water quality and require more stringent limits than the NES-F, which is more likely to be effective at meeting the environmental outcomes for water quality in the pLWRP.	This method will place constraints on some land and water users that impacts on economic growth and employment. However, a more tailored approach, targeting FMUs where water is overallocated or water quality is degraded, will focus the costs in areas where improvement is most required.
Controls on cultivation		
Placing some restrictions on land disturbance for cultivation to prevent soil loss into waterways. Controls/restrictions on cultivation (earthworks) based on slope, setbacks and sediment.	This has benefits for soil conservation, water quality, and in- and near-stream habitats and ecosystems which will assist in achieving the outcomes for water quality in the pLWRP.	New requirements will result in additional costs for resource users to comply with new permitted activity rules and/or consent conditions and associated flow on economic impacts.
Critical Source Areas		
Adding specific management and grazing limits for critical source areas, as these are known to disproportionately contribute contaminants to waterbodies.	Managing critical source areas will reduce overland flow of contaminants to water bodies which will assist in achieving the outcomes for water quality in the pLWRP.	New requirements will result in additional costs for resource users to comply with new permitted activity rules and/or consent conditions.

ATTACHMENT 8

Land & Water Regional Plan Governance Group

Agenda item 2C: Forestry activities and practices that are likely to impact on water quality

Purpose of this paper

1. The purpose of this paper is to seek guidance from the Governance Group on the preferred approach for managing plantation and non-plantation/permanent forestry. It sits alongside two other papers that will be presented to the Governance Group: *Farming activities and practices that are likely to impact on water quality* and *Managing discharges from wastewater and stormwater systems, industrial and trade waste discharges, and sediment discharges associated with earthworks*.[1] Together these papers cover the key ways to improve water quality across Otago.

Direction in higher order planning instruments

2. Plantation forestry activities are largely managed by the National Environmental Standards for Plantation Forestry (NES-PF), with no equivalent for permanent forestry. The NES-PF enables regional plans to include more stringent requirements for plantation forestry in a limited number of circumstances, in order to give effect to the NPS-FM, or where the NES-PF does not manage the specific effect or activity.

3. The notified version of the proposed Otago Regional Policy Statement 2021 (pORPS) includes the following direction for forestry management. Any changes recommended through the s42A report are described in relation to each provision, as relevant:

    - IM-O4, IM-P8 to IM-P12 and IM-M4 in particular provide direction on climate change.
    - CE-M3(4)(d) directs regional plans to reduce discharges of sediment by controlling the impacts of vegetation removal, with specific reference to plantation forestry.
    - LF-LS-M12 directs district plans to control the establishment of new, or extensions of existing plantation forestry where necessary to give effect to an objective developed under the NPSFM 2020. This control is recommended to be extended to include permanent forestry in the s42A report.
    - NFL-M3(3) directs district plans to manage wilding conifer spread, in accordance with NFL-P5, while ECO-M5(6) directs district plans to prohibit the planting of wild conifer species within significant natural areas.

4. As an aside, the Government recently announced a ministerial inquiry into land use, relating to damage caused by woody debris including forestry slash. The Ministers have signalled that recommendations to improve land use will be made, which could include consideration of plantation forestry practices under the NES-PF.[2]

Previous direction from Council, community and mana whenua

[1] Managing discharges from wastewater and stormwater systems, industrial and trade waste discharges, and sediment discharges associated with earthworks is for noting only.
[2] https://www.beehive.govt.nz/release/inquiry-investigate-forestry-slash-and-land-use-after-cyclone

5. Feedback from Council, mana whenua and communities is that plantation forestry requires management to manage water quality impacts including sediment loss, and carbon forestry requires management in water short catchments and in areas subject to wilding species concerns.

6. Other issues were also identified in relation to carbon farming including impacts on communities, fire risk and the use of productive land[3] for forestry, but these are considered to be outside the scope of the pLWRP. While within the scope of the pLWRP and the management of forestry, indigenous vegetation clearance will be a separate topic in the pLWRP.

Issues

7. Forestry activities, including permanent and plantation forestry are known to have adverse impacts on water quality and water quantity, while also having benefits in terms climate change mitigation. Sedimentation of water bodies is known to be an issue in most of Otago's Freshwater Management Units (FMUs) and rohe,[4] while there are several catchments in Otago that are over-allocated in relation to water quantity. Should further restrictions on farming activities be introduced in Otago, it is anticipated that landowners will look to adopt other land use activities, which could include further forestry.

Available planning responses to issues

8. Based on the water quality and quantity issues, and the likely increasing prevalence of forestry in the region, the following outcomes and responses are available:

    - Manage the adverse effects on water quality caused by plantation forestry beyond the requirements of the NES-PF.
        - Provide greater direction on the setbacks of forestry to water bodies and wetlands, including both the size of setbacks, and their management.
        - Establish more stringent rules than those in the NES-PF for managing specific activities that result in sedimentation, such as the haulage of timber across water bodies.
    - Manage the establishment of permanent forestry.
        - Establish a consent framework for permanent forestry, with an enabling pathway for indigenous permanent forestry, while requiring consent for exotic permanent forestry.
        - Within the consent framework, focus on the effects of the forestry on water quantity, particularly in over-allocated catchments, and the management of wilding conifers.

Key questions for the Governance Group

9. In relation to the management of plantation forestry activities, is there support for provisions in the pLWRP that are more stringent than the NES-PF? If so, are there any other effects or activities that should be captured by the pLWRP?

10. What are the key effects that should be considered when assessing a resource consent application to use land for carbon forestry?

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[3] Highly productive land will be mapped in the Regional Policy Statement, and its use and development managed through district plans, in accordance with the National Policy Statement for Highly Productive Land.
[4] Table 34 of the *State and Trends of River and Lake Water Quality in the Otago Region 2000-2020*, Otago Regional Council.

8.4. Recommendations on Land and Water Regional Plan Governance through to notification

Prepared for:	Council
Report No.	SPS2313
Activity:	Governance Report
Author:	Fleur Matthews, Manager Policy Anita Dawe, General Manager Policy & Science
Endorsed by:	Anita Dawe, General Manager Policy and Science
Date:	28 June 2023

PURPOSE

[1] This paper sets out options for managing both the process and content of the proposed Land and Water Regional Plan (pLWRP) until Council decides on public notification in June 2024.

EXECUTIVE SUMMARY

[2] The 'health check' for the pLWRP project has been completed, and the initial findings reported back to the pLWRP Governance Group (GG).

[3] The health check highlighted that the GG is currently performing two functions: providing project management oversight, and policy direction for the pLWRP.

[4] An alternative model is presented that will improve the efficiency and effectiveness of the project's governance. The model involves separating these two functions.

RECOMMENDATION

That the Council*:*

1) ***Notes*** *this report.*

2) ***Directs*** *the Land and Water Regional Plan Governance Group to continue to have the same functions and scope and membership as it currently has; or*

3) ***Directs*** *the Land and Water Regional Plan Governance Group to refocus its functions and scope to the following two matters*

   a. *project management including risk oversight, and*

   b. *to ensure implementation of Te Mana o te Wai; and*

4) ***Notes*** *the Governance Group will comprise 6 members - being Chair Robertson, and Councillors Noone and McCall, two Otakou runaka members and one Murihiku member.*

5) ***Directs*** *staff to amend the Terms of Reference for the Land and Water Regional Plan Governance Group to reflect the decisions made in this paper.*

BACKGROUND

[5] As part of seeking Council's approval for a six-month extension for notifying the proposed Land and Water Regional Plan, the Executive Leadership Team committed to conducting a 'health check' of the pLWRP project. The purpose of the health check was to ensure that the project was set up to succeed, and had the right resources, support and processes to achieve the revised timelines.

[6] That project health check has been completed and has resulted in a range of operational changes to maximise efficiencies, including adjustment of roles, the introduction of an executive steering group to manage and escalate risks, and better project support through some additional resources.

[7] The project review also highlighted that the current Governance Group structure is performing two functions – the first is project management oversight, and the second is providing policy direction for the pLWRP.

[8] The project review identified that some realignment of functions for the Governance Group may provide additional efficiencies, especially given the significant time pressures that the project has.

> *"the structure and purpose of the Governance Group is clearly documented and well understood, however their role does not fit the typical role of a project Steering Committee or Project Governance group …the organisation should consider if the Governance Group is the appropriate structure to provide project governance"*[1]

[9] At its meeting on 26 April 2023, Council was asked to approve revised Terms of Reference for the current LWRP Governance Group. Given the timing of the project review, it was decided to lay the Terms of Reference on the table, awaiting any final recommendations.

DISCUSSION

[10] While work is underway to implement the operational recommendations, staff consider that now is an opportune time to revisit the form and function of the Land and Water Regional Plan Governance Group (GG).

[1] After discussions with the project reviewer and senior staff, the following model is proposed for discussion:

[2] The GG has a focus on the project management, including risks, resources, timelines, and roadblocks. It also has a single policy objective to ensure that policy direction provided to staff is consistent with and implements Te Mana o te Wai. This would look like:

i. A six member GG, with the current two ORC Councillors, the current Murihiku representative and the current two Ōtākou representatives, plus the addition of the ORC Co-Chair of the Environmental Science & Policy Committee;
ii. They would meet fortnightly for one hour;
iii. They would report to Council at every meeting against milestones, likely via the Chief Executives Report and
iv. They would ensure policy decisions were consistent with and implementing Te Mana o te Wai.

[1] *Hawtin, M. (2023) Otago Regional Council LWRP Project: Project Health Check [unpublished]*

v. There would be a feedback loop from the Environmental Science & Policy committee to the GG, to ensure any concerns were able to be addressed at a high level.

[3] Any policy direction papers would be managed through workshops with the Environmental Science and Policy Committee, and then Council papers as required. This would look like;

i. Workshops with the Committee which includes the two iwi representatives; and
ii. As for other Committees, no formal decision making power; and
iii. If concerns are raised in terms of consistency with Te Mana o te Wai, it will be referred back to the GG for discussion; and
iv. Workshops would be scheduled in and not need to occur after GG meetings.

[11] One of the challenges of this model is that Kai Tahu ki Murihiku is not currently represented on the Environmental Science and Policy Committee. Pending the outcome of the current iwi led process for committee members, Council could choose to invite a representative from Murihiku to attend workshops where the LWRP is being discussed. Because there is no decision making at workshops, it would enable a Murihiku voice to be heard, ahead of Council noting decisions. Staff consider this aligns with the requirements around engagement and partnership with iwi as set out in the NPS-FM.

OPTIONS

[12] Council could choose to retain the status quo in terms of the GG. This would mean all Councillors continued to attend GG and policy direction would continue to be discussed. This option aligns with the NPSFM in terms of iwi involvement. This current model is not considered the most efficient use of time and results in duplication as policy discussions occur twice – once at GG, and then a second time at workshops.

[13] The second option would be to adjust the structure as set out above, with the GG having a project management function and a policy focus of ensuring policy direction is consistent with Te Mana o te Wai. Committee workshops would be used for the more in-depth policy discussions. This option has an additional active decision around how to support Kai tahu ki Murihiku inclusion in policy workshop discussions.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[14] ORC is responsible for implementing national direction and regulations, including by notifying proposed policy statements and plans that will give effect to the relevant higher order documents. ORC has committed to a work programme with the Minister which includes notifying a new pLWRP by 30 June 2024.

[15] The new pLWRP will contribute to fulfilling Council's objectives under ORC's Strategic Directions of leading environmental management in Otago, in partnership with mana whenua; promoting collaboration with territorial authorities and others to achieve resilient and sustainable communities; and promoting a healthy and resilient environment whose capacity for sustaining life and ecosystem heath is enhanced and sustained.

Financial Considerations

[16] There may be additional costs associated with implementing the recommendations from the project health check, but these will be managed and brought to the Executive Steering Group and Governance Group as required.

Significance and Engagement Considerations

[17] The decisions sought by this paper are not considered significant when assessed against *He Mahi Rau Rika: ORC Significance, Engagement and Māori Participation Policy*. The Policy considers the Governance Group structure to be consistent with legislative requirements.

Legislative and Risk Considerations

[18] The development of a new pLWRP is required to implement the National Policy Statement for Freshwater Management 2020 (NPS-FM). The pLWRP will be developed in accordance with the requirements prescribed by the NPS-FM and the RMA.

Climate Change Considerations

[19] No impact.

Communications Considerations

[20] Not applicable.

NEXT STEPS

[21] If Council agrees to the recommended option in this paper, the following actions will need to be taken:

a. staff to amend the GG terms of reference in consultation with mana whenua, and present them at the next Council meeting for approval;
b. Chair of Environmental Science and Policy Committee to invite a representative from Murihiku to attend workshops where the LWRP is being discussed.

[22] Regular Environmental Science and Policy Committee workshops and meetings will be scheduled through for the rest of 2023 to provide policy direction on the pLWRP.

ATTACHMENTS

Nil

8.5. Annual Report on Regional Climate Change Collaboration

Prepared for:	Council
Report No.	STG2303
Activity:	Community: Governance & Community
Author:	Francisco Hernandez, Principal Adviser Climate Change
Endorsed by:	Amanda Vercoe, General Manager Governance, Culture and Customer
Date:	26 June 2023

PURPOSE

[1] This report provides a high-level update to Council on the activities facilitated by the Otago Regional Council (ORC) to support its regional leadership role for climate change. It is a required level of service measure under the Long-Term Plan and is the first annual report on climate change collaboration.

EXECUTIVE SUMMARY

[2] The 2021-2031 Long Term Plan contains a level of service measure to *"lead a regional approach to climate change in partnership with local councils and Iwi."* The 2022-2023 Annual Report contained a target demonstrating Council's leadership of climate change collaboration.

[3] ORC and Councils within the region have worked constructively on regional approaches to climate change over the past year. ORC has partnered with local councils to prepare the Otago Climate Change Risk Assessment and the Regional Greenhouse Gas Inventory.

[4] The growing level of national level direction on climate change and increasing desire from local councils and the community to do more on climate change has provided a catalyst to consider climate change in a more co-ordinated way. This aligned with ORC's strategic direction to lead a regional approach to climate change and we have been active in the first year of operation.

[5] Activities in the first year of operation (2022-2023 financial year) include: establishing the staff-level regional working group, conducting a regional climate stocktake, providing co-ordination for the Otago Climate Offices' Group (OCOG) monthly meetings and workshops, scoping a regional sequestration study, updating the regional greenhouse gas emissions inventory, approving scenario parameters for the projected emissions and scenario modelling work and formalising the group through drafting a term of reference.

[6] We anticipate that the next year (2023-2024) of the work will concentrate on the scoping and drafting of a regional climate change strategy and integrating climate change in the next long-term plan.

RECOMMENDATION

That the Council:

1) ***Notes** this report.*
2) ***Notes** that further engagement and collaboration activity is underway as part of the preparation for the Regional Climate Strategy.*
3) ***Notes** that a scoping document for the Regional Climate Strategy is coming to council in August, incorporating feedback from the recent workshop with Council.*

BACKGROUND

[7] At the 14 August 2019 meeting, ORC passed a resolution *"that the council: agrees that Otago must continue to prepare for the certainty that climate change will present emergency situations in many areas of our region and will therefore continue to give high priority to adaptation to climate change, especially in our flood and drainage schemes and in South Dunedin, and to minimising our carbon emissions."*

[8] In the 2021-2031 Long-Term Plan ORC added a level of service measure to *"lead a regional approach to climate change in partnership with local councils and Iwi."*

[9] In recent years, councils in the region have begun to increasingly work together on various climate change projects. At a regional level these include: the development of the Otago Climate Change Risk Assessment (OCCRA) and a Regional Greenhouse Gas Inventory. Our local government partners in the region: Queenstown Lakes District Council, Dunedin City Council, Waitaki District Council, Central Otago District Council and Clutha District Council have been instrumental in the success of these projects – providing district level data and contributing expertise and resources to enable these projects to be completed successfully.

[10] ORC has also been part of climate collaboration driven at the territorial local authority level such as the Dunedin City Council's Zero Carbon Alliance which ORC is a member of and other informal staff to staff cooperation on climate issues.

DISCUSSION

Formation and Formalisation

[11] The organic, project-based work that has characterised climate change collaboration in the region was successful in delivering the completion of the Otago Climate Change Risk Assessment and the first Regional Greenhouse Gas Inventory. But as climate change increasingly becomes a focus of both National level policy and local policy, the need to work closer together, and more formally, as a region has become evident. This was explored in a series of regular online meetings from May 2022. Ultimately the informal working group of climate officers in the region decided to hold a full day workshop to further scope what working together on climate change as a region might look like.

[12] This full day workshop was held on 30 September 2022 with attendance from all councils in the region. It was a productive day with a name for the group agreed on (Otago Climate Officers' Group or OCOG), future areas for regional cooperation agreed on (sequestration, emissions reduction and adaptation) and future meeting dates and protocols agreed to.

[13] Since then, OCOG has been meeting monthly with meetings alternating between online and face-to-face workshops. The online meetings allow information sharing across the region and to progress projects in between face-to-face workshops. The face-to-face workshops are themed around certain topics with three workshops having been held so far. An *Adaptation* workshop in Alexandra on 24 November 2022 hosted by the Central Otago District Council, a *Regional Greenhouse Gas Scenario Modelling* workshop held on 21 February 2023 hosted by the Otago Regional Council and an *Emissions Reduction Plan and Local Government* workshop held on 18 April 2023 and hosted by the Queenstown Lakes District Council.

[14] The cross-council regional working group has continued to mature over the past year, with ORC drafting formal Terms of Reference (ToR) for OCOG after getting input from the members. This draft along with a report on activities was received by the Otago Chief Executives' Forum on 19 May 2023.

Regional Climate Stocktake

[15] The Otago Climate Officer's Group completed a regional climate stocktake at the request of the Otago Chief Executives Forum. This was an inventory of climate change action that each council is undertaking and helped inform the CE Forum. The group intends to update the stocktake on a regular basis to provide decision makers in the region an up-to-date global view of how councils in the region are responding to climate change.

Regional Greenhouse Gas Emissions Inventory and Scenario Modelling

[16] A Regional Greenhouse Gas Emissions Inventory is the balance of emissions in the region – whether from carbon or methane gasses being released in the atmosphere or carbon dioxide sequestered by forestry. An accurate measure of emissions in the region is necessary to understand at a deeper level where emissions are coming from in order to propose the next steps.

[17] The Regional Greenhouse Gas Emissions Inventory is being updated with the cooperation of all councils across the Otago Region to the 2020-21 financial year from the previous 2018-19 financial year. ORC commissioned PWC to undertake additional scenario modelling of three scenarios representing a different range of policy ambition in the region. PWC worked closely together with all parties to seek input from partners on the methodology of the greenhouse gas inventory and the parameters of the scenarios to be used in the scenario modelling.

[18] The greenhouse gas inventory and scenario modelling will be presented at the Otago Regional Council's August meeting and will provide an update to the previous greenhouse gas inventory. The scenarios that have been commissioned are future focussed and will help us understand what scale of emissions reductions might be required along different scenarios which will assist in target setting.

Regional Sequestration Study

[19] OCOG is currently scoping out a sequestration study for the region as the very first potentially co-funded project with financial support from some partners and logistical support from others. The intention is to provide councils in the region with an idea

about the current and future sequestration sources in the region. It will inform the development of the regional climate strategy as well as assist councils with future policy making.

Other staff level climate collaboration outside of OCOG

[20] While the Otago Climate Officers' Group is the primary forum for staff level climate work at a regional scale, there are many other examples of climate collaboration that occur outside of OCOG. Climate change is increasingly a concern not within the region but across Aotearoa, which is why local governments from across the motu/island are working together more frequently.

[21] The Otago Regional Council and many of our partners in the Climate Officers' Group are part of the two national level council climate working groups. The Aotearoa Council Climate Network (ACCN) – which covers mitigation and the Aotearoa Climate Adaptation Network (ACAN) which covers adaptation. ORC attended the ACAN hui last year, along with other councils in the region and presented on the South Dunedin Future programme along with the Dunedin City Council.

[22] The Natural Hazards ORC team has partnered across the region with local councils to help communities adapt to natural hazards which are exacerbated by climate change. This includes a formal partnership with the Dunedin City Council through the South Dunedin Future project but also collaboration with the Queenstown Lakes District Council on the Head of the Lake Project, Waitaki District Council and Clutha District Council.

Zero Carbon Alliance

[23] The Otago Regional Council is a signatory to Dunedin's Zero Carbon Alliance. Council collaborates with the Dunedin City Council and other key institutions (Te Pukenga – Dunedin campus, Te Whatu Ora – Southern, and the University of Otago) to support achievement of both organisational and city-wide emissions reduction goals. The Zero Carbon Alliance programme of work is focusing on the first instance on staff travel to work, because it represents one of the most significant collective opportunities to reduce city-wide emissions: ZCA employees are approximately 18% of Dunedin's workforce, and emissions associated with private vehicle trips are a significant contributor to emissions at both organisational and city-wide scales.

Engagement with mana whenua

[24] ORC has been engaging on climate change as a discrete topic with Aukaha since the middle of 2022 and has begun discussions with Te Ao Mārama Incorporated in the context of climate change. ORC is keen to partner with Aukaha and TAMI to involve rūnaka in scoping and developing our climate change strategy and responses for the region. We are aware that ORC's local government entities in the region have their own processes and ways of working with mana whenua. Going forward a wider conversation may need to happen to figure out the best way to work with mana whenua in the context of the regional climate collaboration.

[25] We acknowledge that Kāi Tahu have already published a climate change strategy (link here). ORC will seek to understand how the regional climate strategy can support mana whenua partners and the wider community to achieve their aspirations and goals.

Future areas of work:

[26] The Otago Regional Council is scoping out a programme of work centred around the development of a Regional Climate Strategy. This will cover both adaptation and mitigation in the region and explore how we can better work together as a region to build resilience to the impacts of climate change and assist our communities to reduce emissions. OCOG will be a valuable conduit across all our councils as well as being a good community of practise to sense check and peer review work.

[27] The next phase of the work will be to scope out what working together on climate change might look like as a region and present a scoping document to council at an August meeting.

[28] We have identified areas where local government was signalled as a partner in the National Adaptation Plan and the Emissions Reduction Plan. It is anticipated that the next phase of the work will be to identify potential areas that councils can work together on in the region.

OPTIONS

[29] This is a noting paper, so no options have been provided.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[30] This work is aligned to ORC's commitment to a regional leadership approach in the strategic directions and fulfils a level of service measure in our 2021-2031 Long Term Plan.

Financial Considerations

[31] No significant financial consideration – all activities for this year were within budget.

Significance and Engagement

[32] This paper does not trigger ORC's policy on significance and engagement.

[33] Forming OCOG has involved co-operation between ORC and the five local councils – as have the projects that we've undertaken this year. Further cooperation between ORC and the local councils is essential to progress further joint climate work. We also acknowledge the range of community led work that has been undertaken over a long period of time and will look to see how we can further enable and collaborate with existing and proposed community led initiatives.

Legislative and Risk Considerations

[34] This has no direct legislative or risk consideration.

Climate Change Considerations

[35] This report is about climate change and therefore climate considerations are in the body of the whole report.

Communications Considerations

[36] This annual report on climate collaboration may be reported in the media as interest in climate change is high. We can communicate ORC's regional leadership and the positive collaboration between us and local councils as a good sign of success.

NEXT STEPS

[37] We will continue engaging with the local councils through OCOG. This will include the regular catch ups to continue fostering the spirit of regional collaboration but to work on projects. These projects include completing the regional greenhouse gas emissions inventory and scenario modelling.

[38] Engagement with mana whenua will continue – we have been actively working with both Aukaha and Te Ao Mārama Inc and this will continue as we further scope what a partnership approach to regional climate collaboration might look like to mana whenua.

[39] We will further scope what collaboration might look like between the ORC and local councils and present it along with a scope of the regional climate change strategy in August.

ATTACHMENTS

Nil

8.6. Otago Wellbeing Baseline Report

Prepared for:	Council
Report No.	STG2305
Activity:	Community: Governance & Community
Author:	James Adams, Senior Strategic Analyst
Endorsed by:	Amanda Vercoe, General Manager Governance, Culture and Customer
Date:	28 June 2023

PURPOSE

[1] To provide Council with an inaugural baseline report on wellbeing in Otago.

EXECUTIVE SUMMARY

[2] The Otago Wellbeing Baseline Report (the Baseline Report) is a milestone in wellbeing measurement for ORC. It provides an initial overview of how Otago measures up against other regions in New Zealand for the wellbeing outcomes that matter to our region's communities. Where possible, it also highlights diversity of wellbeing within the region.

[3] Wellbeing is at the heart of ORC's purpose and activities, as indicated in both the Local Government Act 2002 and the Resource Management Act 1991.

[4] ORC's Strategic Directions identified that ORC needed to understand more about regional wellbeing so that it could identify significant issues, consider its role, and take any appropriate actions. Therefore, the Long-term Plan (LTP) includes a Level of Service to "Collect information on Otago regional wellbeing (economic, social, cultural, and environmental) and identify significant issues."

[5] ORC, in conjunction with partners and stakeholders, initiated a wellbeing programme to deliver on this level of service. The first phase of the programme was to develop a Regional Wellbeing Framework (the Framework). The Framework is a multi-purpose strategic tool that provides:

a. A means to collect, analyse, and distribute data and information,
b. A tool for understanding what is happening in Otago,
c. Knowledge to support work of other local and central govt agencies.

[6] The Framework does not add to what ORC currently does or assume responsibility for the things measured. It is not, in itself, a strategic framework; it is a tool that can help ORC's strategic framework to operate effectively and to better understand the region's communities.

[7] ORC engaged Kōtātā insight to lead development of the Framework. The development process included a working group and advisory group, drawn from staff from Otago's territorial authorities, Southern DHB, Ministry of Social Development, and a small selection of community members representing a range of interests. The Framework was first delivered to Council, along with an accompanying report, in November 2022. It was

further discussed with Council in a workshop in February 2023. It has also been presented to the region's Mayoral Forum.

[8] Kōtātā Insight's report included a wide range of indicators for measuring the wellbeing outcomes in the Framework. Because the outcomes are tailored to Otago's context, data for some of the indicators were not readily available from existing statistical sources – they would have to be built up from existing data or collected from Otago's communities. This process entails a considerable resource and time commitment, so the baseline report has been focused on available data to reduce cost.

[9] Data for 33 indicators was available from existing data sources, and ORC engaged Dot Loves Data (DOT) to source and analyse the data for these available indicators to deliver the Baseline Report.

[10] The Baseline Report shows that Otago is faring reasonably well against the Frameworks' outcomes. Performance is strong in the dimensions of healthy and fulfilled people, belonging and identity, and participation and governance.

[11] Otago's weaker performances are in the dimensions of connected communities and an enabling built environment, with attention needed to the dimensions of a good standard of living and, potentially, a healthy natural environment.

[12] The Framework is intended to be a living tool, that will be updated and improved as time goes on with further input from mana whenua partners and other Council's and stakeholders expected.

[13] The next steps for this work programme are to work with key parties to better understand the information and to identify options for responding either by individual Council or agency or as a region through existing mechanisms such as the Otago Mayoral Forum.

RECOMMENDATION

That the Council:

1) ***Notes** this report.*
2) ***Notes** that consultation on the wellbeing outcomes contained in the Framework will be embedded into the Long-term Plan consultation process.*
3) ***Notes** that wellbeing reporting is proposed to continue every three years, with minor annual updates where data is available.*
4) ***Recommends** that Council determines the best mechanism to respond to the issues and opportunities raised in the report. This could include a formal cross-council working group reporting to the regional Chief Executive and Mayoral forums under the terms of the Otago Triennial Agreement, or, alternatively, continuing with an ORC focused programme.*

BACKGROUND

Why measure wellbeing?

[14] The Local Government Act 2002 section 10(1)(2) states that one of the purposes of local government is to "promote the social, economic, environmental, and cultural well-being of communities in the present and for the future."

[15] Wellbeing is also embedded in the purpose of the Resource Management Act 1991.[1]

[16] ORC identified, through its Strategic Directions, that it needed to understand more about regional wellbeing to identify significant issues, consider its role, and take any appropriate actions.

[17] Accordingly, the LTP includes a level of service to: "Collect information on Otago regional wellbeing (economic, social, cultural, and environmental) and identify significant issues." The LTP includes a corresponding performance measure to complete a baseline report on wellbeing indicators, with an annual report on wellbeing indicators and issues to be provided thereafter.

[18] ORC's annual plan 2022 – 2023 requires the annual report on wellbeing indicators and issues and report to Council by 30 June.

[19] More generally, there is a growing expectation from central government, tangata whenua, the local government sector, and the wider public, that local authorities need to increase their understanding of and focus on holistic wellbeing. Examples of this change can be seen in commentary in the Future for Local Government Review, Review of the Resource Management Act, and the increasing number of sector initiatives to measure wellbeing.

How to measure wellbeing?

[20] Wellbeing covers a wide range of interconnected factors in people's lives and takes different forms for different people. Wellbeing measurement needs to be carefully structured to account for and reflect wellbeing's multiple aspects and perspectives.

[21] ORC engaged Kōtātā Insight, experts in the conceptualisation of wellbeing, to lead development of a Wellbeing Framework to structure wellbeing measurement in Otago. The framework is a tool to enable ORC to identify appropriate indicators for wellbeing in Otago, and measure progress against wellbeing outcomes. It will also enable wellbeing to be more effectively incorporated into strategic planning and decision making.

[22] ORC convened a Working Group and a wider Advisory Group to guide the Framework's development. Members of these groups were identified through professional networks, and directly invited to participate. The working group included staff from territorial authorities, Ministry of Social Development, Southern District Health Board (Now Te Whatu Ora), Aukaha, and Te Ao Mārama Inc.

[23] The Framework was presented to Council on 28 September 2022. A workshop with Council was then held on 21 February 2023 to further discuss the Framework's content and structure.

[1] Resource Management Act 1991, s5.

[24] The Framework identifies 7 key outcomes for wellbeing in Otago, grouped into three dimensions: People, Community, and Place.

	Wellbeing Domain	Outcome
People	**Healthy and fulfilled people**	People in Otago live safe, meaningful lives with good physical and mental health.
	A good standard of living	People have good livelihoods, with access to quality employment and education. Individuals, families and whānau are able to prosper and support themselves.
Community	**Connected communities**	Communities and networks in Otago are cohesive and provide opportunities for positive social interaction and support.
	Belonging and identity	People of all backgrounds feel a sense of belonging in Otago. People are able to practice and share culture and traditions.
	Participation and governance	Formal and informal governing bodies function effectively through active and diverse engagement.
Place	**A healthy natural environment**	The mauri of Otago's taiao is respected and preserved. Otago's air, water, land, and biodiversity is healthy and its natural beauty endures.
	An enabling built environment	Spaces, connections, and infrastructure empower people to live well.

Table 1: Otago Wellbeing Framework domains and outcomes

[25] The outcomes are supported by four pou – cross cutting principles that inform wellbeing measurement across the dimensions:

a. Equity in the distribution of outcomes:
    i. what is the gap between the most privileged and most disadvantaged?
    ii. Are outcomes fairly reflected across communities in Otago?
b. Mātauraka Kāi Tahu informs and is reflected in all aspects of wellbeing:
    i. How are the treaty partnership and Te Ao Kāi Tahu values reflected in wellbeing outcomes, both formally and informally?
c. Sustainability of wellbeing for future generations:
    i. Will the wellbeing outcomes we seek today be available to our descendants?
    ii. Are we being good ancestors?
d. Resilience to shocks that might affect people's wellbeing:
    i. How well can our wellbeing outcomes endure through shocks and abrupt changes like natural disasters, climate migration, financial crises, or pandemics?

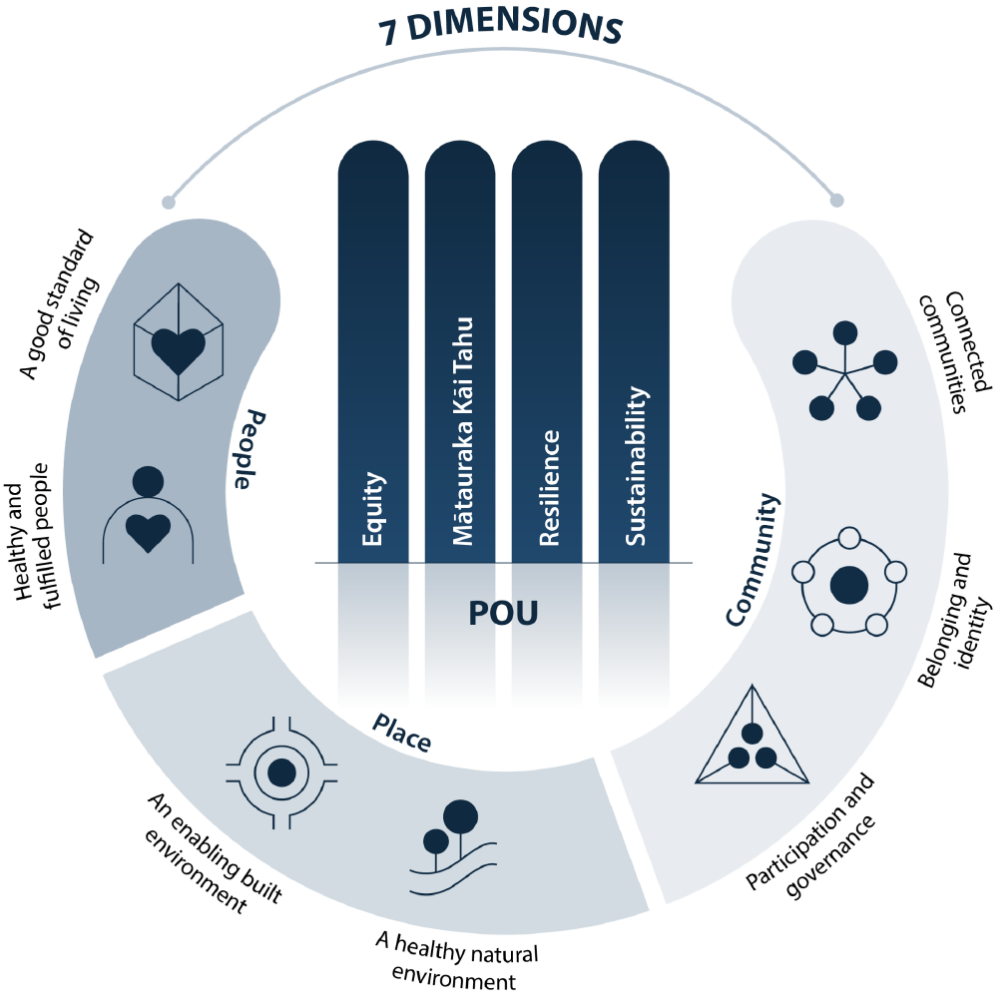


Fig. 1: The Otago Wellbeing Framework

[26] The report accompanying the framework listed a wide range of indicators (existing and bespoke) that could be measured to assess progress against the outcomes.

What data is available?

[27] Some of the indicators are not readily available from existing sources of statistical data, because the outcomes in the Framework are bespoke. It will take further statistical analysis and resources to build these indicators.

[28] The Report was commissioned to report only on the indicators that are readily available from existing data sources. Although this is not the full suite of indicators ORC may wish to use in the future, it is enough to build a solid baseline picture of wellbeing in Otago.

[29] Dot has also developed an aggregate indicator for each of the 7 domains of wellbeing. This indicator shows how Otago is performing in each of these key outcomes in comparison to other regions in New Zealand. The scale is relative: a higher number

indicates that Otago is performing well more often in more indicators compared to other regions.

[30] It is difficult to provide a discrete suite of indicators to represent environmental health at a district/regional level.

[31] The Report trialled three indicators for environmental health at a regional level that were readily available from national data sources:

a. Indicator 29: Mean PM10 concentration in micrograms per cubic metre,
b. Indicator 30: Percentage of swimming sites deemed safe,
c. Indicator 31: Tonnes of carbon dioxide equivalent gas emissions per capita.

[32] The Report draws on national data from Land, Air, Water, Aotearoa (LAWA) for environmental data.

[33] The results have shown that Indicators 29 and 30 have limited utility at a district/regional level, because:

a. Environmental measurements are carried out at particular sites and are specific to those sites. For example, it is not particularly meaningful to compare Lake Wānaka with Lake Hayes, because their circumstances are so different, and it is not scientifically meaningful to aggregate their results to determine water quality performance for Queenstown Lakes District.
b. Swimming site safety is strongly affected by transient events, for example water sampling will likely show very different results after rain.
c. Sampling sites for air quality are deliberately chosen to measure at Otago's poorest performing sites, so any aggregated measurement will be skewed towards poor results.

[34] The results for these indicators have been included in the report for completeness. As monitoring practice continues to develop, ORC will look to develop more meaningful regional and district level indicators specific to environmental health in Otago.

[35] The CO2 measure is more useful. However, note that the CO2 equivalent emissions per capita figure has been derived from national level statistics, and regional greenhouse gas emission inventories might produce different figures.

DISCUSSION

[36] Overall, the report shows that Otago is performing reasonably well across our key wellbeing outcomes. Note that these aggregated outcome indicators are relative, that is, they show how ORC's performance compares to other regions in New Zealand but is not an absolute measure of performance. This can be assessed by delving into the results for individual indicators.

[37] Otago is performing particularly strongly in:

a. Dimension 1: Healthy and fulfilled people.
b. Dimension 4: Belonging and identity.

c. Dimension 5: Participation and governance.

[38] There is room for improvement in:

a. A good standard of living.
b. A healthy natural environment.

[39] Otago's lowest performance is in:

a. Dimension 3: Connected communities.
b. Dimension 7: An enabling built environment.

[40] Delving to the level of individual indicators, Otago is the highest ranked region for:

a. Indicator 4: Mean sense of life being worthwhile.
b. Indicator 23: Proportion of the population reporting it easy or very easy to express their identity.
c. Indicator 28: Mean generalised trust.

[41] Otago's ranks last out of the observed regions for:

a. Indicator 9: Regional real GDP per capita.
b. Indicator 24: Proportion of the population speaking Te Reo Māori.
c. Indicator 25: Proportion of Otago Māori population speaking Te Reo Māori.

[42] Otago remains an above average emitter of CO2 among the regions, though in absolute terms, performance in this measure has improved.

[43] Other challenges appearing from the data include indicator 13, Proportion of 15 to 24 year-olds Not in Education, Employment, or Training, which shows Otago's performance slipping, between 2024 to 2023 relative to other regions, perhaps indicating challenges in education, employment, and training opportunities. There is also a higher proportion than the national average of Males leaving school with NCEA level 2 compared to females.

[44] These results indicate that, compared to the rest of New Zealand, Otago has some substantial social capital through diversity, inclusion, and trust that ORC can build on as a foundation for cooperation and collaboration. However, there are also notable issues with various indicators reflecting Otago's standard of living.

[45] Otago Regional Council does not have sole influence over any of these indicators and outcomes, and its influence of many of them is indirect. Nonetheless, there are opportunities to take these factors into account.

[46] As an example, the proportion of the population speaking Te Reo Māori in Otago may be related to a lower proportion of Māori people living in Otago. Nonetheless, ORC can contribute towards increasing this proportion through a dedication to using proper forms of Kāi Tahu place names, using Te Reo in public engagement, and an organisational dedication to understanding tikaka and Te Reo.

[47] This data provides a basis and direction for further conversation and developing cross-agency initiatives with other public sector and industry organisations. It can also

contribute to ORC's prioritisation of actions in the Long-term Plan, particularly for formulating the community outcomes required under the Local Government Act.

[48] Several indicators suggested in the Framework report by Kōtātā insight are not readily available but, when built or collected, will contribute further nuance and depth to reporting.

[49] The Otago Wellbeing Baseline Report is a useful starting point but, standing alone, it will have marginal value. The return for Otago's Local Authorities will come from building on this work through:

a. Partnering with Kāi Tahu and undertaking further discussion with agencies and the public to gauge responses to the data, priorities for action and to ensure we are measuring the right things,

b. Continuing to report on wellbeing to gather information about Otago's progress through time,

c. Further developing data recording and gathering measures to enrich the data's range and specificity to Otago,

d. Refining the framework over time to respond to feedback on the Framework and changes in community priorities,

e. Embedding the wellbeing framework in our quality assurance and strategic development work, so that it informs our organisational and regulatory strategy and action plans.

f. Using this reporting as a basis for ongoing cross-agency collaboration.

[50] ORC's regional scope makes it a good candidate for leading development of this work. However, some aspects of wellbeing are more embedded in the work of territorial local authorities or public sector agencies, there may be better candidates to take charge of running the ongoing programme. Such groups could include, for example, the Otago Mayoral Forum, which has received a presentation from the ORC on the Otago Wellbeing Framework and has shown interest in the work being undertaken.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[51] The wellbeing work programme is consistent with ORC's Strategic Directions and LTP.

Financial Considerations

[52] There are no specific financial considerations associated with this paper. Ongoing reporting on these measures is a performance measure under the LTP.

Significance and Engagement

[53] This work programme is consistent with ORC's Significance, Engagement and Māori Participation policy.

[54] Note that, though Aukaha and Te Ao Mārama staff have been involved in the working group, rūnaka have elected to keep a watching brief on this work programme due to heavy commitments to other priorities (including ORC's own Regional Policy Statement and Land and Water Regional Plan processes).

[55] It is vital that, as the work programme for wellbeing is developed further, ORC partners with Kāi Tahu to ensure that the outcomes are appropriate for Kāi Tahu's needs, and that the right data is being collected in the right way.

Legislative and Risk Considerations

[56] A wellbeing framework helps us more effectively and efficiently discharge ORC's responsibilities under the Local Government Act 2002 and Resource Management Act 1991.

Climate Change Considerations

[57] Climate change will have significant impacts on the wellbeing of Otago's communities. Wellbeing measurement will provide guidance to strategic decision making associated with ORC's climate change work programme.

Communications Considerations

[58] Opportunities for engagement with the Framework and associated data will be considered once the report has been circulated to mana whenua partners, other councils and agencies and those who have participated in the process thus far.

NEXT STEPS

[59] The Framework and associated data will be disseminated to mana whenua partners, other councils and agencies and those who have participated in the process.

[60] Staff will continue to work with the wellbeing working group to discuss the implications of this report and investigate opportunities for cross-agency collaboration.

ATTACHMENTS

1. ORC - Baseline Wellbeing Report [**8.6.1** - 93 pages]

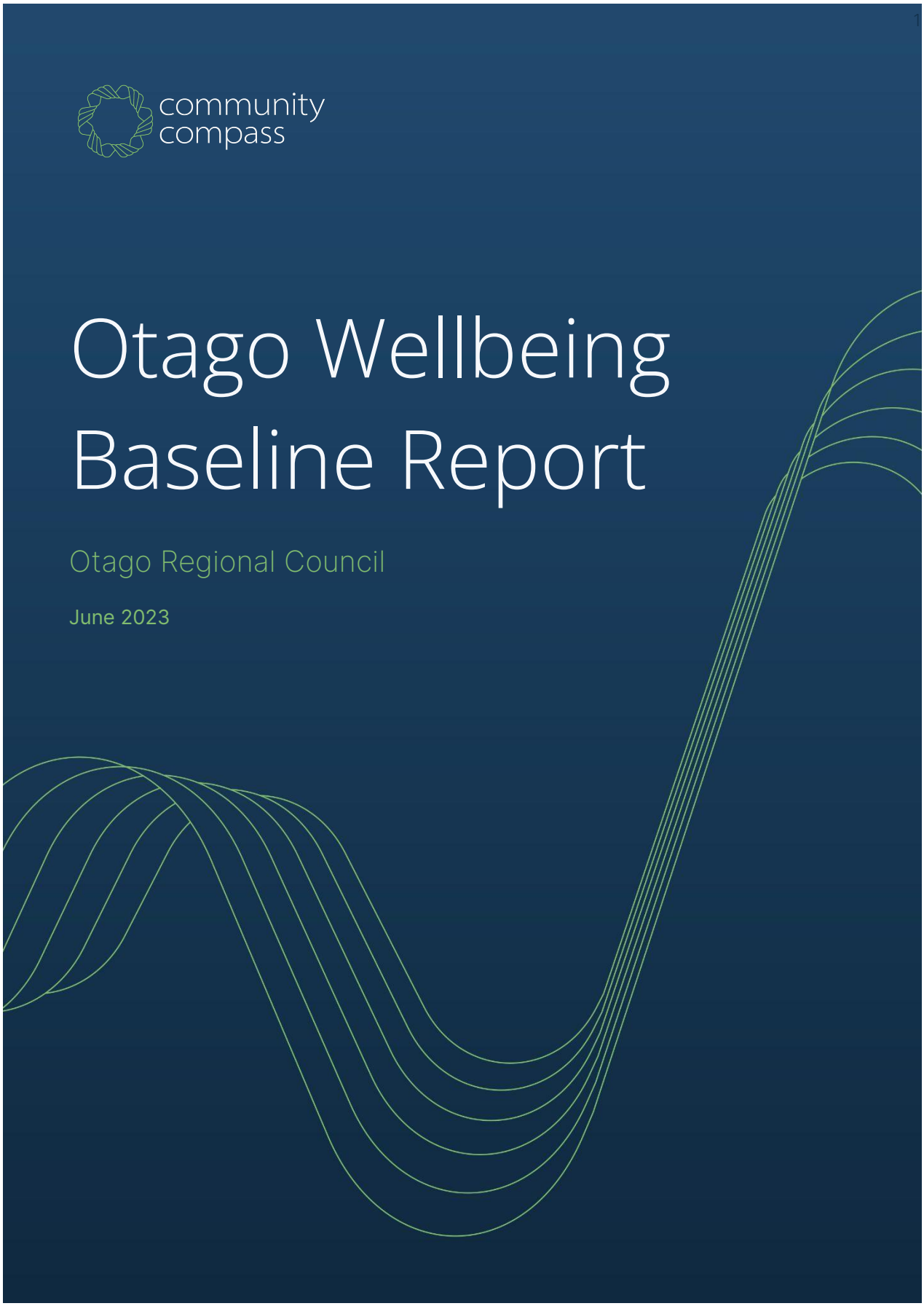

community compass
Otago Wellbeing Baseline Report
Otago Regional Council
June 2023

Table of contents

1. Executive Summary

The Otago Regional Council is working towards better understanding the environmental, cultural, social, and economic wellbeing of the Otago community. It has developed a Wellbeing Framework for Otago to help gain a comprehensive understanding of wellbeing in the region and also a regional programme to monitor it. Otago's Wellbeing Framework centres around seven dimensions of wellbeing and includes 33 indicators as a way to measure outcomes in the region.

This initiative reflects a growing expectation, from communities and central government, for councils to actively promote community wellbeing and consider a wellbeing perspective within everything they do. Getting an overview of community wellbeing in the region is essential to meeting these expectations and reflects a legislative responsibility under the Local Government Act. It is a fundamental duty imposed on local governments to prioritise and promote the overall wellbeing of their communities.

Dot Loves Data was engaged to collect data, at the local, regional and national level, from a range of identified sources to complete a baseline wellbeing report for the Otago Region and its constituent territorial authorities. The report includes data for:

- New Zealand
- Otago Region
- Clutha District Council
- Central Otago District Council
- Dunedin City Council
- Queenstown Lakes District Council
- Waitaki District.

This report presents data with simple and accessible analysis for each of the 33 indicators, for all available areas and provides an overall summary of wellbeing in the region compared to the national score. We have developed Dimension Scores, which are a combination of normalised indicators within each dimension, and are designed to provide aggregate scores for Otago compared with the optimal wellbeing of any region or district.

As the report outlines, the Otago Region has a strong current baseline from which future performance can be monitored. Otago communities are filled with healthy and fulfilled people, with a good standard of living. The Otago Region has a strong sense of belonging and identity and strong levels of participation and governance. There are areas that could benefit from monitoring and additional support which include Otago's natural environment, strengthening the connectedness of communities and enabling the built environment.

By publicly monitoring wellbeing outcomes, the Otago Regional Council and its supporting organisations ensure transparency and accountability in their efforts to strengthen their commitment to the Otago community by accelerating progress towards sustainable and inclusive wellbeing for all.

This Baseline report is an initial iteration of the development of a Wellbeing Framework for the Otago Region. We anticipate the Otago Regional Council can work with organisations and communities within Otago to refine and enhance the report over time to incorporate additional insights and feedback from stakeholders, ensuring its continuous improvement and relevance.

2. Introduction

At a regional level, the Otago Regional Council and organisations within Otago work together to advance the environmental, cultural, social, and economic wellbeing of the Otago community. To gain a more complete understanding of wellbeing in the region, the Council has launched a regional programme to monitor it. By tracking wellbeing, the Council can measure the outcomes that truly impact people, rather than just the means of achieving them. This will allow them to better understand the full range of outcomes in the region and avoid situations where gains in one area mask losses in another. The wellbeing framework will help Councils prioritise actions that have the greatest impact on the wellbeing of both current and future generations. By understanding what works for wellbeing, the programme will serve as a foundation for accelerating progress.

Promoting the environmental, cultural, social and economic wellbeing of the Otago Region is at the heart of the work by the Otago Regional Council. To be able to draw a more comprehensive picture of wellbeing in Otago, the Council has initiated a regional wellbeing monitoring programme. The wellbeing monitoring programme aligns with the Council's 2021 Strategic Direction and its Long Term Plan for 2021-2031, in which the Council commits to engaging with Otago's communities to collect relevant wellbeing information that can identify any significant issues that affect wellbeing in the region and to take appropriate actions to address these.

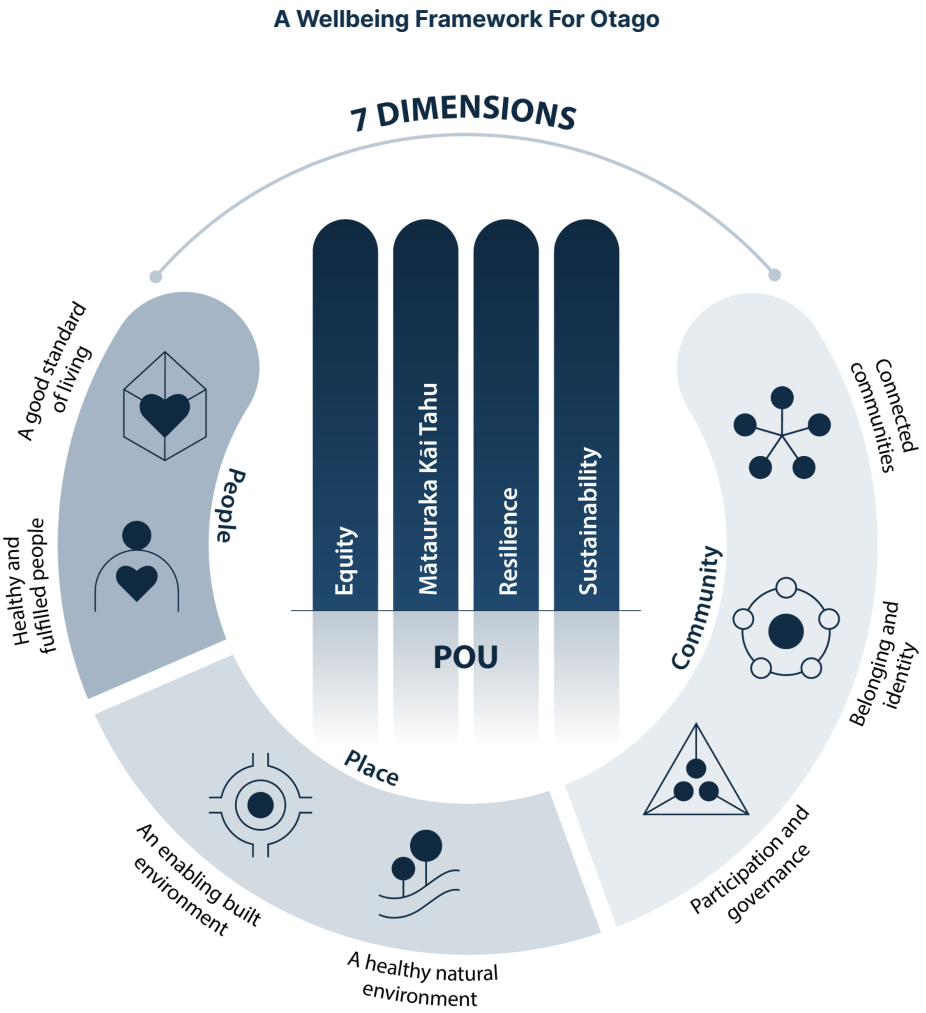


Figure 1: The Otago Wellbeing Framework

POU

Equity | **Mātauraka Kāi Tahu** | **Resilience** | **Sustainability**

The four pou capture principles vital to people's wellbeing in Otago that need to be considered across all seven dimensions of wellbeing. They address whether the distribution of outcomes is equitable, Otago's resilience to shocks that might affect people's wellbeing and whether levels of wellbeing can be sustained for future generations. Mātauraka Kāi Tahu informs and is reflected in all aspects of wellbeing.

DIMENSIONS

People

Otago people's wellbeing matters. This is grounded both in people's livelihoods and in other aspects of life.

Healthy and fulfilled people

People in Otago live safe, meaningful lives with good physical and mental health.

A good standard of living

People have good livelihoods, with access to quality employment and education. Individuals, families and whānau are able to prosper and support themselves.

Community

Thriving communities are essential to people's wellbeing both in the connections that people make and in terms of engagement and civic participation.

Connected communities

Communities and networks in Otago are cohesive and provide opportunities for positive social interaction and support.

Belonging and identity

People of all backgrounds feel a sense of belonging in Otago. People are able to practice and share culture and traditions.

Participation and governance

Formal and informal governing bodies function effectively through active and diverse engagement.

Place

The places people live, work, and explore - both natural and built - set the parameters for how people are able to live their lives.

A healthy natural environment

The Māori of Otago's taiao is respected and preserved. Otago's air, water, land, and biodiversity is healthy and its natural beauty endures.

An enabling built environment

Spaces, connections, and infrastructure empower people to live well.

Figure 2: The Four Pou and 7 Dimensions of the Wellbeing Framework

Seven Dimensions of Wellbeing

For the purposes of monitoring wellbeing in Otago, seven outcome areas (wellbeing domains) have been identified along with four pou that cut across all aspects of wellbeing. These are referred to as the seven dimensions, which are:

1. Healthy and fulfilled people: People in Otago live safe, meaningful lives with good physical and mental health;
2. A good standard of living: People have good livelihoods, with access to quality employment and education. Individuals, families and Whānau are able to prosper and support themselves;
3. Connected communities: Communities and networks in Otago are cohesive and provide opportunities for positive social interaction and support;
4. Belonging and identity: People of all backgrounds feel and sense of belonging in Otago. People are able to practise and share culture and tradition;
5. Participation and governance: Formal and informal governing bodies function effectively through active and diverse engagement;
6. A healthy natural environment: The mauri of Otago's taiao is respected and preserved. Otago's air, water, land, and biodiversity is healthy and its natural beauty endures;
7. An enabling built environment: Spaces, connections, and infrastructure empower people to live well.

Four Cross Cutting Pou

Four cross-cutting pou underpin the seven dimensions of wellbeing in the Otago Wellbeing Framework. The four pou are not distinct dimensions of wellbeing but are principles or ways of looking at wellbeing that cut across the seven dimensions. The four Pou are:

1. Equity

The equity pou reminds us that it is not just the overall level of wellbeing in the Otago population that matters, but also its distribution among groups in the population. Equity means that people and communities have access to the support appropriate to their needs and that this is reflected in the distribution of wellbeing outcomes in Otago.

2. Mātauraka Kāi Tahu

The Mātauraka Kāi Tahu pou recognises the importance of the knowledge, values and worldviews of Kāi Tahu, as mana whenua for the Otago Region, across all aspects of wellbeing. It means that the traditional knowledge and values of Kāi Tahu inform and are reflected in all aspects of wellbeing. At a practical level it means thinking about outcomes from the perspective of Kāi Tahu

across all of the seven wellbeing domains and ensuring that outcome measures are available for those aspects of wellbeing that are important to Kāi Tahu.

3. Resilience

The resilience pou looks at the degree to which levels of wellbeing are resilient to potential shocks and whether the wellbeing of people in Otago is unduly vulnerable to natural or manmade hazards. In addition, it captures whether resources are available to respond to and to support recovery from crises when they occur. This means thinking, not just about current outcomes, but about how those outcomes could change in the event of a negative shock and considering what is available to communities to help them cope in times of crisis. There may be a tension between resilience and efficiency in that the former prioritises having more resources than are needed in ordinary circumstances in order to improve the collective ability to cope with a crisis.

4. Sustainability

The sustainability pou reflects the need to balance the wellbeing needs of current generations by developing a Wellbeing Framework for Otago to safeguard the wellbeing of future generations to come. It is about being good ancestors, respecting planetary boundaries and ensuring that resources are passed onto future generations in a better state than they were received. While looking after the environment is a fundamental part of sustainability, the concept goes beyond this. Sustainability is fundamentally concerned with intergenerational equity and whether future generations have been left with sufficient resources of all types to support their wellbeing.

3. Methodology

Indicator Methodology

This report comprises 33 indicators of wellbeing. From the data collected on these indicators it is important to note:

- Data availability varied for national, regional and territorial authority level. Where available DOT collected data at national, Otago Region and TA level, however in some cases only national and Regional level was available and not down to a TA level.
- Date range varies across the datasets and therefore comparison dates vary throughout the report.
- Where regions or territorial authorities shared the same ranking, the minimum ranking was applied therefore two or more regions may show as first out of the regions if they are first equal.
- The total number of territorial authorities and regions included in the analysis may differ from the expected figures of 67 territorial authorities and 16 regions as the data collected from different sources might result in variations in the count of territorial authorities and regions considered in the analysis.

Scoring Methodology

The scoring methodology used in section 4 combines the indicators within each dimension to calculate overall dimension scores. To ensure comparability across regions and time, the indicators are first normalised. Here a value of 1 represents the best wellbeing result achieved by any region or territorial authority (TA) since 2013, while a value of 0 represents the worst result in that time period. For instance, a score of 0.6 means that the dimension is 60% towards reaching the best possible result.

Colour Scales

To showcase key areas the Otago Region and its communities are doing well in and not so well in, we have used a green, orange and red colour-coded system.

- Green: Where the Otago Region fares better than the national average. This reflects where the Otago region should continue its already outstanding efforts.

- Orange: When the Otago Region is performing at or approximate to the national average, but some other regions are performing more strongly. Here the Otago region is performing adequately, but should evaluate what the other regions are doing better at to assess whether any initiatives can be implemented to accelerate wellbeing.
- Red: This is where Otago performs below the national average and below most other regions. Otago Regional Council and its supporting organisations will need to focus on these dimensions and indicators within that to evaluate what changes can be made to increase community wellbeing.

Time Scales

This report is a benchmark on the wellbeing of the Otago region, and serves as a foundational reference point from which further analysis and progress can be made. It brings together a comprehensive set of 33 indicators sourced from various datasets, covering a wide range of aspects and dimensions of wellbeing. It is important to note that the data for several indicators included in this report only extends up to 2018 or 2019, thus not fully capturing the potential impact of the recent tumultuous times caused by the COVID-19 pandemic. However, despite these limitations, the aggregated indicators from different time periods still provide meaningful measures of wellbeing.

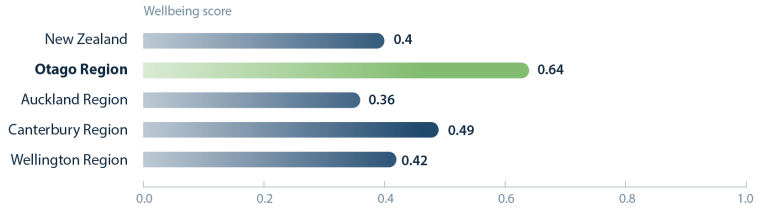
More information on the approach to this report, methodology and the steps taken to calculate the scores are described in the appendix.

4. Overview of the Otago Region in May 2023

Dimension 1

Healthy and Fulfilled People

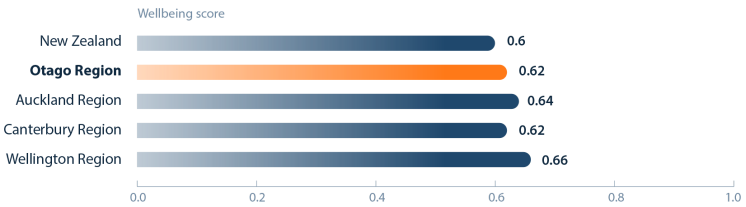
The Otago Region performs strongly for the healthy and fulfilled people dimension. In May 2023 it is at 64% of optimal performance, which outperforms New Zealand and other regions.



Dimension 2

A good standard of living

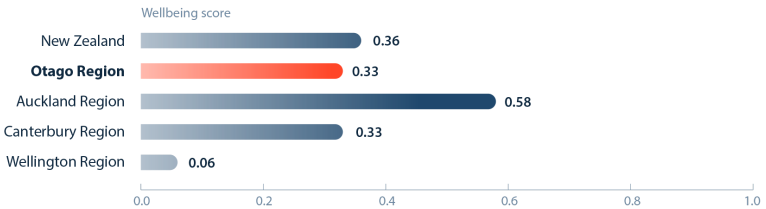
Otago has a good standard of living relative to other regions and the national benchmark. However, this dimension requires monitoring because the regional GDP, median hourly earnings indicators and male NCEA level 2 attainment are underperforming.



Dimension 3

Connected communities

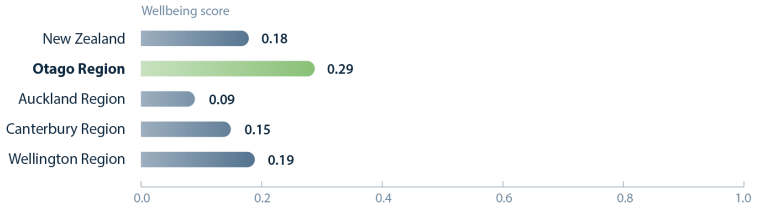
The Otago Region performs much lower than the national benchmark for Connected Communities. This should be a key focus area for the Otago Region to improve connection within communities.



Dimension 4

Belonging and identity

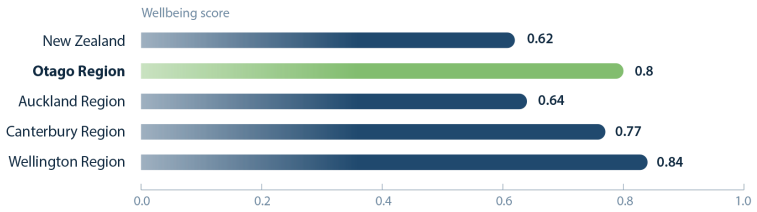
Otago has a strong sense of belonging and identity relative to National and Regional scores.



Dimension 5

Participation and governance

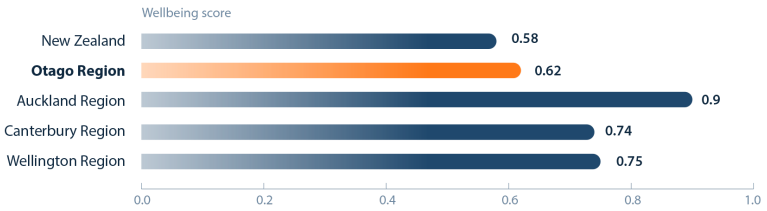
Otago Region has strong levels of participation and governance and performs at 80% of the optimal level in 2023.



Dimension 6

A healthy natural environment

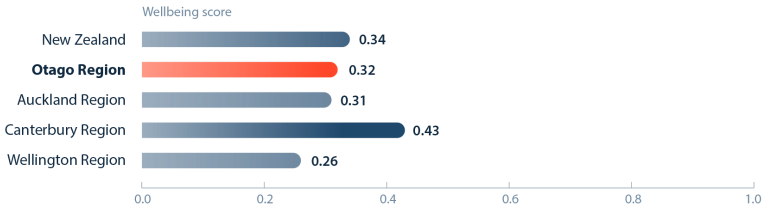
Otago's natural environment performs below the other main regions, but above the national average. New initiatives should be considered within this dimension.



Dimension 7

An enabling built environment

Otago's built environment performs below the National benchmark and initiatives should be considered to improve the current baseline, particularly in relation to housing.



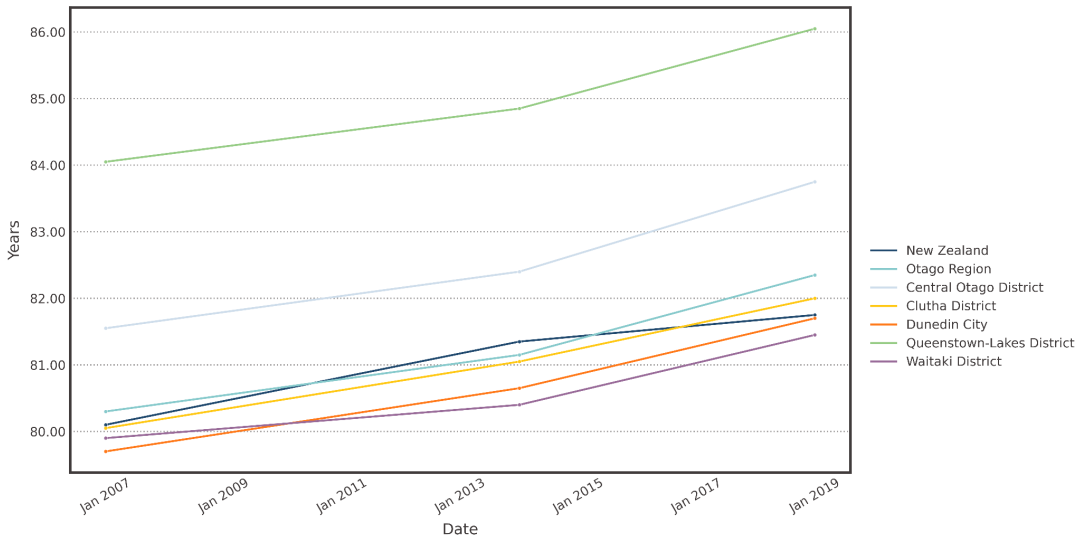
5. Dimension Analysis

Dimension 1: Healthy and Fulfilled People

Indicator summary for the Otago Region

Indicator 1: Life expectancy	✓
Indicator 2: Victimisations per 10,000 people	🔍
Indicator 3: Mean life satisfaction score	✓
Indicator 4: Mean sense of life being worthwhile	✓
Indicator 5: Māori/non-Māori gap in life expectancy	✓
Indicator 6: Gender gap in life expectancy	🔍

Indicator 1: Life expectancy



This indicator analyses the life expectancy within the Otago Region between 2014 and 2019.

In 2019, life expectancy in the Otago Region has generally increased, sitting at 82.35 years which is slightly above the New Zealand average of 81.75 years. Central Otago, Clutha, Dunedin City, and Waitaki all saw improvements in their rankings and life expectancy values during this period. Notably, Queenstown-Lakes District's life expectancy of 86.05 years in 2019 ranked it first in New Zealand, a rank it has consistently maintained over successive years.

These findings indicate positive trends in life expectancy, reflecting improvements in healthcare, quality of life, and other relevant factors within the Otago Region. It is important for the Otago Regional Council and its supporting agencies to continue monitoring and supporting initiatives that contribute to the overall wellbeing and longevity of its residents.

1. Central Otago District:
    - Ranking Change: The Central Otago District improved its ranking from 8th out of 67 districts in 2014 to 5th in 2019.
    - Life Expectancy: The life expectancy in the Central Otago District increased from 82.4 years in 2014 to 83.75 years in 2019.

2. Clutha District:
    - Ranking Change: The Clutha District improved its ranking from 34th out of 67 districts in 2014 to 20th in 2019.
    - Life Expectancy: The life expectancy in the Clutha District increased from 81.05 years in 2014 to 82.0 years in 2019.

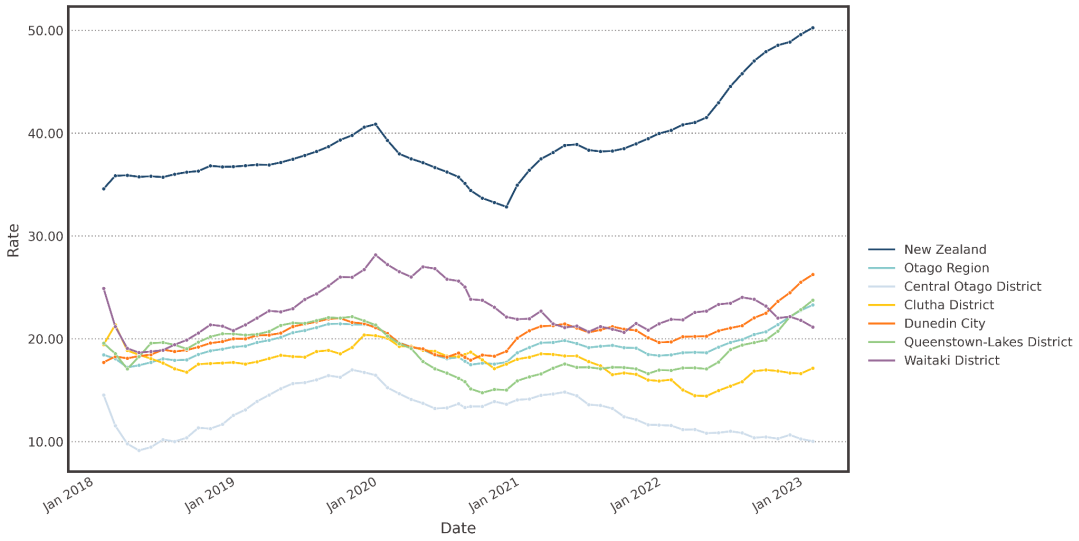
3. Dunedin City:
    - Ranking Change: Dunedin City improved its ranking from 41st out of 67 districts in 2014 to 26th in 2019.
    - Life Expectancy: The life expectancy in Dunedin City increased from 80.65 years in 2014 to 81.7 years in 2019.

4. Queenstown-Lakes District:
    - Ranking Change: The Queenstown-Lakes District maintained its ranking as 1st out of 67 districts in both 2014 and 2019.

- Life Expectancy: The life expectancy in the Queenstown-Lakes District increased from 84.85 years in 2014 to 86.05 years in 2019.

5. Waitaki District:
    - Ranking Change: The Waitaki District improved its ranking from 46th out of 67 districts in 2014 to 34th in 2019.
    - Life Expectancy: The life expectancy in the Waitaki District increased from 80.4 years in 2014 to 81.45 years in 2019.

Indicator 2: Victimisations per 10,000 people



Indicator 2 measures the victimisation rates per 10,000 people in the regions that are benchmarked against New Zealand for the years 2018 and 2023.

In 2018, the New Zealand victimisation rate was 34.59, which then rose in 2023 to 50.27 per 10,000 people. For the Otago Region in 2018, it had a victimisation rate of 18.44 per 10,000 people however by 2023, victimisation rate increased to 23.3. The data suggests that while the Otago Region experienced an increase in victimisation rates, it remained comparatively lower than the national average for New Zealand. However, further analysis is needed to gain a comprehensive understanding of the factors contributing to these rates and to develop effective strategies for addressing victimisation.

1. Central Otago District:
   - Value 2018: 14.53 Rate
   - Value 2023: 10.03 Rate

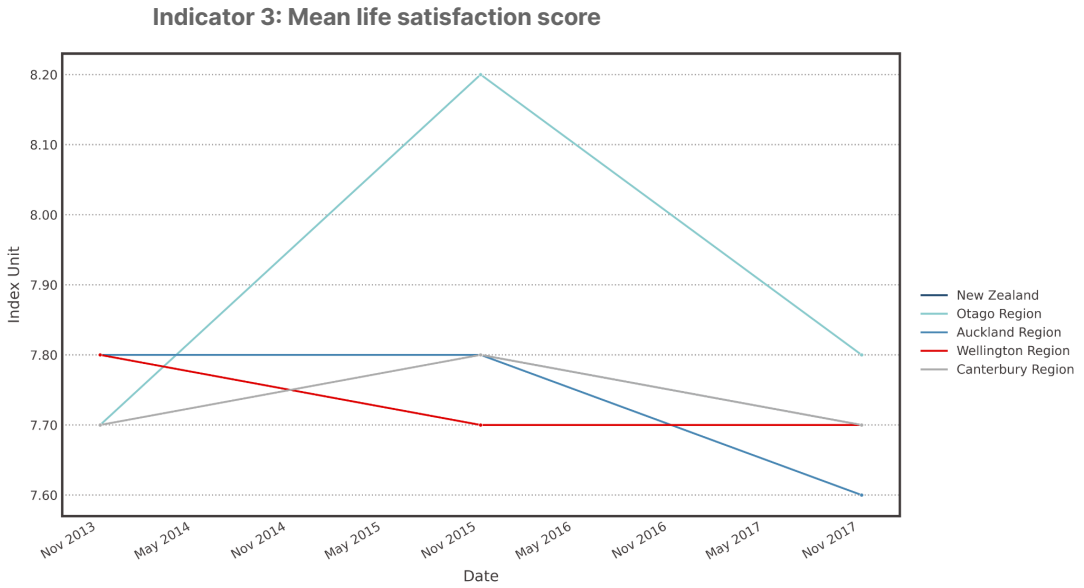
2. Clutha District:
   - Value 2018: 19.43 Rate
   - Value 2023: 17.14 Rate

3. Dunedin City:
   - Value 2018: 17.71 Rate
   - Value 2023: 26.26 Rate

4. Queenstown-Lakes District:
   - Value 2018: 19.57 Rate
   - Value 2023: 23.76 Rate

5. Waitaki District:
   - Value 2018: 24.91 Rate
   - Value 2023: 21.14 Rate

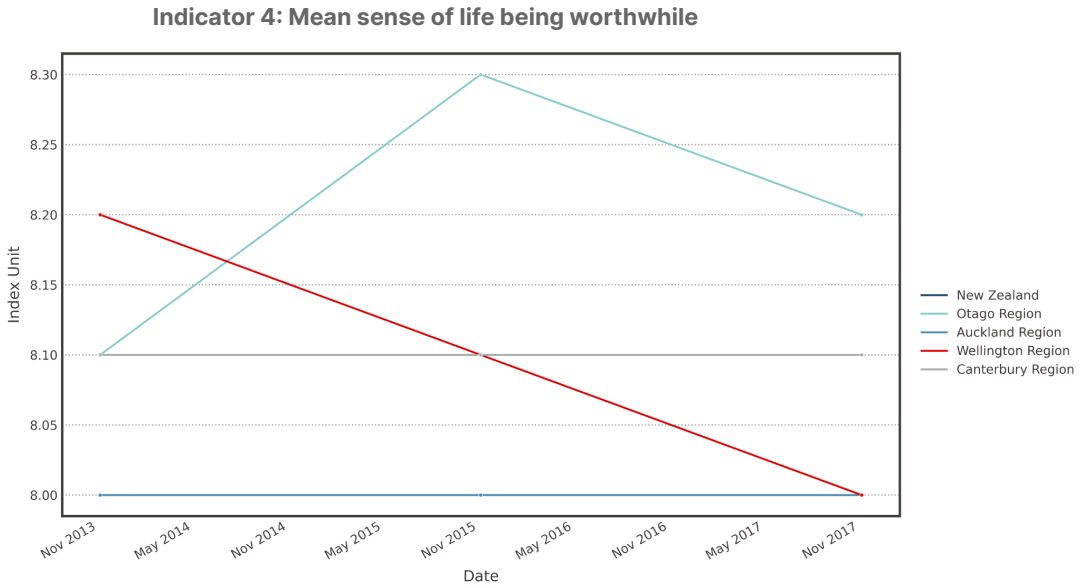
Among the regions, Dunedin City experienced the highest increase in victimisation rate, while Central Otago District had the lowest. Queenstown-Lakes District and Waitaki District maintained their rankings but had slight changes in their victimisation rates.



Please note on the graph above that New Zealand values follow the same trend as Cantebury so these are overlapping.

The mean life satisfaction score is the headline indicator of subjective wellbeing for New Zealand. Here we have displayed ranking changes between 2016 and 2018 for Otago against the national benchmark and the main metropolitan regions of New Zealand: Canterbury, Wellington and Auckland. The data is available at a national and regional level only, rather than territorial authority.

The values across the two compared years of 2014 to 2018 do not vary significantly, and range between 7.6 and 7.8. The national average life satisfaction score in 2018 in New Zealand is 7.7 index, equal to Wellington and Canterbury. The Otago Region has a slightly higher life satisfaction score of 7.8 and after experiencing a peak in 2015, whilst the Auckland region had a slightly lower value or 7.6.

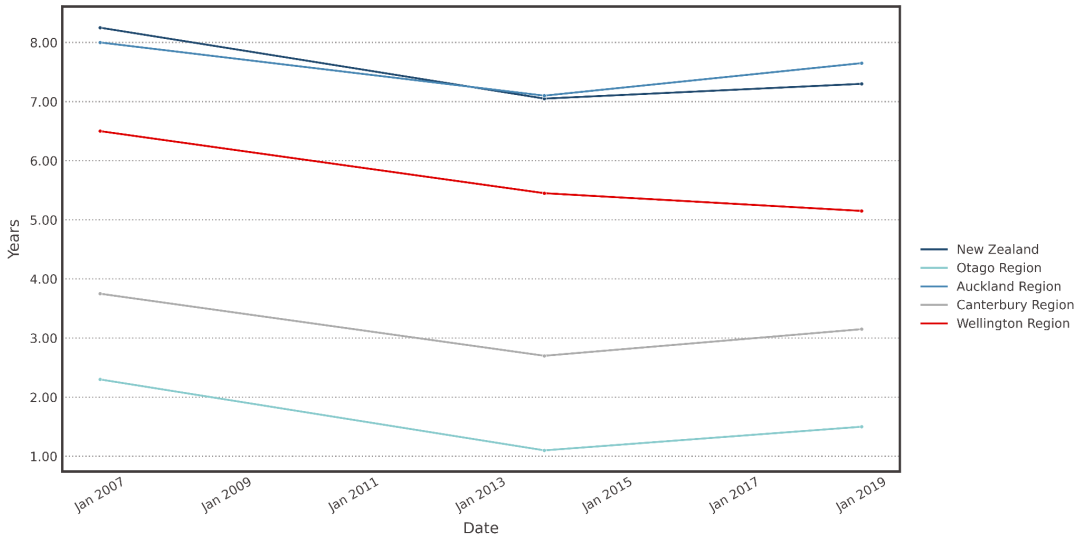


Please note on the graph above that New Zealand values follow the same trend as Cantebury so these are overlapping.

The mean sense of life being worthwhile is a complementary indicator of overall wellbeing. Here we can analyse Otago Region's performance relative to New Zealand's general population and other metropolitan regions. The data is available at a national and regional level only, rather than territorial authority.

The Otago Region had the highest sense of life being worthwhile in 2018 with an index unit of 8.2, after peaking at 8.3 in 2016. This was the highest ranked out of all regions in 2018. The New Zealand index value of 8.1 ranks slightly higher than the Auckland and Wellington values of 8.0. These findings emphasise the significance of fostering a sense of life being worthwhile among individuals, as it contributes to their overall wellbeing and life satisfaction. The Otago Regional Council and supporting agencies should consider initiatives and programs that promote a sense of life being worthwhile, such as educational and career development opportunities, community engagement, and mental health support.

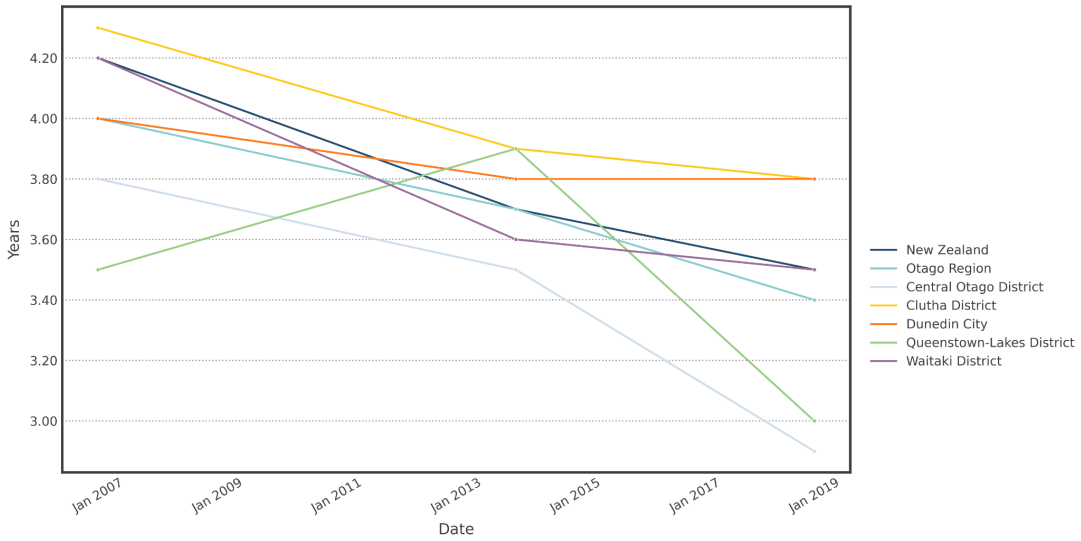
Indicator 5: Māori/non-Māori gap in life expectancy



Indicator 5 focuses on the gap in life expectancy between the total population and Māori in different regions of New Zealand. Measuring change helps us to better understand the distribution of health outcomes between Māori and non-Māori. The data is available at a national and regional level only, rather than territorial authority.

At a national level, the life expectancy gap between the total population and Māori in New Zealand increased slightly between 2014 and 2019. In 2014, the life expectancy gap was 7.05 years, which grew to 7.3 years by 2019. At the regional level, focusing on the Otago Region, it experienced a relatively smaller life expectancy gap compared to other regions. In 2014, Otago had a 1.1 year gap in life expectancy, compared to 2019 where it grew slightly to 1.5 years. This suggests that efforts may have been made to narrow the life expectancy disparity between Māori and the rest of the population in the region.

Indicator 6: Gender gap in life expectancy



The following analysis focuses on the gap in life expectancy between New Zealand, the Otago Region and Otago's territorial authorities. We analysed the performance of the region as well as Otago's territorial authorities between 2014 and 2019 to better understand the distribution of health outcomes by gender.

In 2019, the national average gender gap in life expectancy is 3.5 years, which decreased from 3.7 years in 2014. Of all the regions, our analysis shows Central Otago District and Queenstown-Lakes District had some of the lowest gender gaps in 2019, at 2.9 years and 3 years in life expectancy compared to the national average of 3.5 years. These regions demonstrate a more balanced life expectancy between genders. However, Clutha District and Dunedin City have slightly higher gender gaps than the national average, indicating slight disparities in health outcomes between genders. The Waitaki District has a gender gap that is consistent with the national average.

1. Central Otago District:
    - In 2014, the life expectancy gender gap in Central Otago District was 3.5 years, which was slightly lower than the national average of 3.7 years. By 2019, there was a noticeable improvement as the gender gap decreased to 2.9 years compared to the national average of 3.5 years.

- The district ranked 7th in 2014 and moved to 2nd in 2019, indicating significant progress in reducing the gender gap and improving life expectancy.

2. Clutha District:
    - Clutha District had a higher gender gap in life expectancy compared to the national average of 3.7 years in 2014, with a value of 3.9 years. This trend remained stable in 2019, with a value of 3.8 years.
    - Unfortunately, the district experienced a decline in ranking, moving from 35th in 2014 to the 50th (equal with Dunedin city) in 2019.

3. Dunedin City:
    - In 2014, Dunedin City also had a higher gender gap in life expectancy compared to the national average, with a value of 3.8 years. This gender gap remained the same in 2019.
    - The city experienced a significant decline in ranking, moving from 25th in 2014 to 50th (equal with Clutha District) in 2019.

4. Queenstown-Lakes District:
    - The Queenstown-Lakes District had a slightly lower gender gap in life expectancy compared to the national average in 2014, with a value of 3.9 years. By 2019, there was significant improvement as the gender gap decreased to 3.0 years.
    - The district also experienced a remarkable improvement in ranking, moving from 35th in 2014 to 3rd in 2019.

5. Waitaki District:
    - Waitaki District had the same gender gap in life expectancy as the national average in 2014, with a value of 3.6 years. In 2019, the gender gap remained stable, with a value of 3.5 years.
    - However, the district experienced a decline in ranking, moving from 12th out of 67 districts in 2014 to 19th in 2019.

Indicator 7: Māori/non-Māori gap in mean life satisfaction

Indicator 7 contains data at a national level only, with no breakdown by region or territorial authority. For this reason we have not analysed this indicator.. We expect to include it in the framework reporting when sub-national data becomes available in future.

Indicator 8: Gender gap in mean life satisfaction

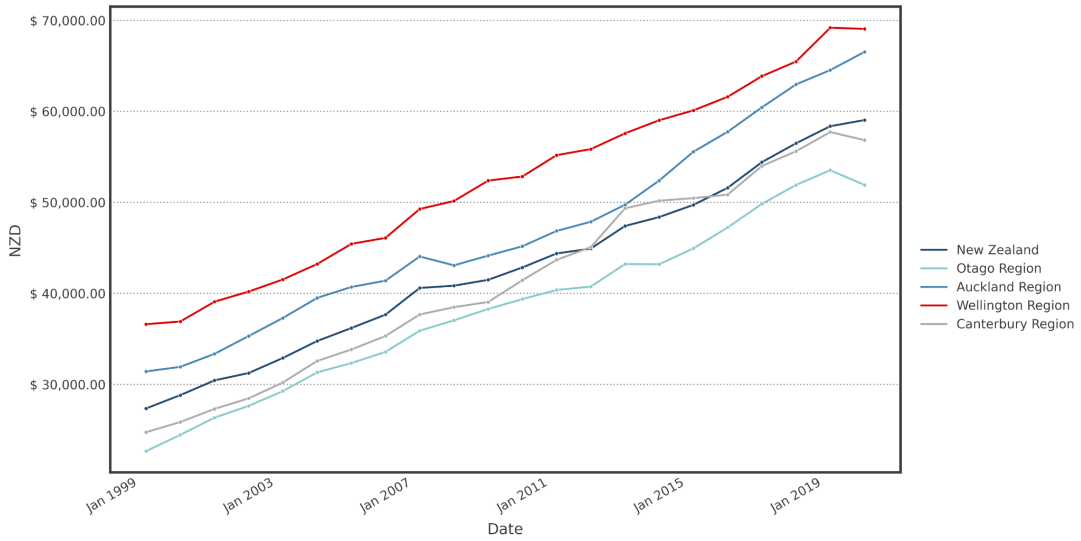
Indicator 8 contains data at a national level only, with no breakdown by region or territorial authority. For this reason we have currently left this indicator blank. We expect to include it in the framework reporting when sub-national data becomes available in future.

Dimension 2: A good standard of living

Indicator summary for the Otago Region

Indicator 9: Regional real GDP per capita	
Indicator 10: Real median hourly earnings	
Indicator 11: Employment rate	
Indicator 12: Job Seeker Support rate	
Indicator 13: Proportion of 15 to 24 year-olds Not in Education, Employment, or Training (NEET)	
Indicator 14: School leavers with NCEA level 2 and above	
Indicator 15: School entrants with prior ECE	
Indicator 16: Percentage of schools leavers enrolled in tertiary education as a proportion of the population	
Indicator 17: Median hourly earnings as a percentage of mean hourly earnings	
Indicator 18: Māori median hourly earnings as a percentage of non-Māori median hourly earnings	
Indicator 19: Female median hourly earnings as a percentage of male median hourly earnings	
Indicator 20: Ratio of the proportion of males leaving with NCEA level 2 as their highest qualification, compared to the proportion of females	
Indicator 21: Ratio of the proportion of Māori leaving with NCEA level 2 as their highest qualification, compared to the proportion of the total population	

Indicator 9: Regional real GDP per capita

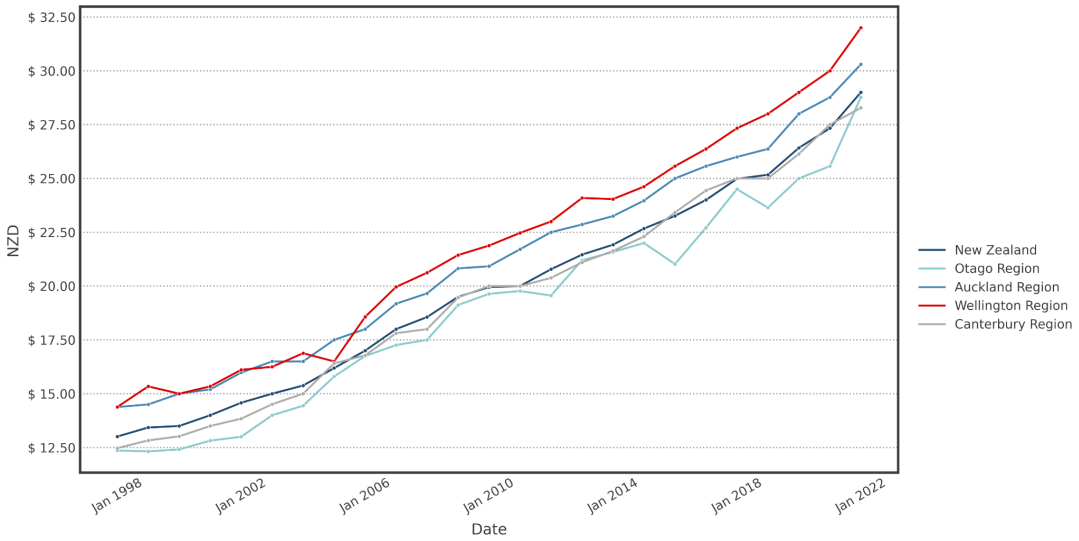


This indicator focuses on the regional real GDP per capita in different regions of New Zealand and serves as a headline indicator of regional incomes. We have measured performance changes and regional rankings between 2014 and 2021. The data is available at a national and regional level only, rather than territorial authority.

The national average for regional real GDP per capita in New Zealand in 2021 was $59,049 NZD compared to $47,409 in 2014, which was a 24% increase.

The Otago Region has a lower regional real GDP per capita compared to the national average, with a value of $51,922, increasing 20% since 2014. This indicates a relatively lower economic output per person. The Otago Region dropped from 9th to 10th out of 13 regions between 2014 and 2021, and remains lower than the main metropolitan regions. Auckland ranks first, Wellington second and Christchurch third.

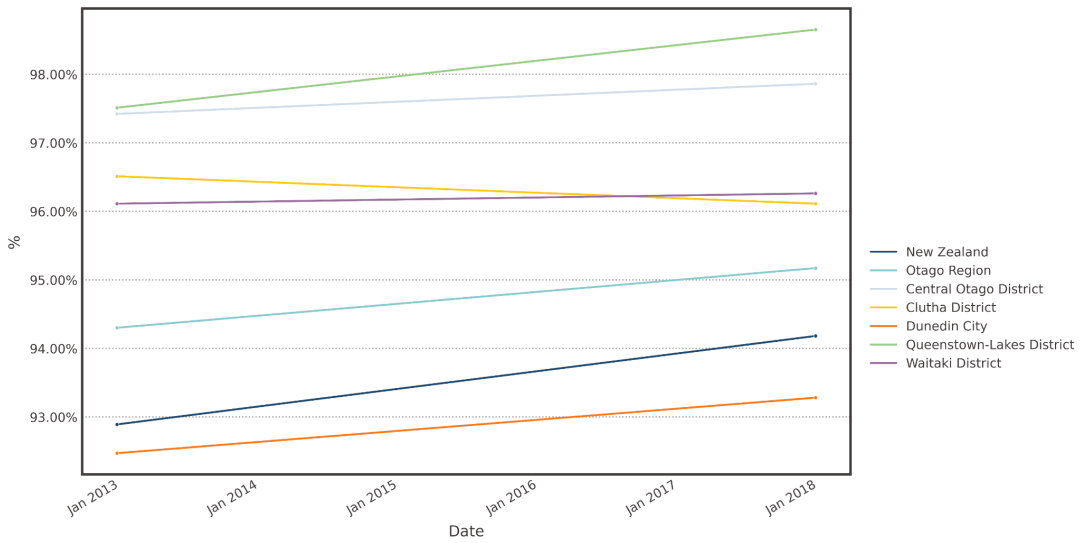
Indicator 10: Real median hourly earnings



This analysis focuses on the median hourly earnings in New Zealand and by region. We've measured performance between 2014 and 2022 as a headline indicator of workplace earnings. The data is available at a national and regional level only, rather than territorial authority.

The national average for median hourly earnings in New Zealand in 2022 is $29, which increased by 32% since 2014. The Otago Region has a slightly lower median hourly earnings compared to the national average, with a value of $28.77, which increased 33% since 2014. Whilst the Auckland and Wellington Regions have slightly higher median hourly earnings. Like Otago, the Canterbury region also has slightly lower median hourly earnings compared to the national average.

Indicator 11: Employment rate



Indicator 11 focuses on the employment rate in New Zealand and Otago territorial authorities between the Censuses of 2013 and 2018. This serves as a headline indicator of access to employment.

The most recent data available in 2018 shows that the national employment rate in New Zealand is 94.18%. Based on the given data, the Queenstown-Lakes District ranks the best in terms of employment rate among the analysed regions in this report. It has consistently high employment rates, with a value of 98.65% and an improved ranking from 3rd to 2nd out of 67 districts. The region's strong economy, driven by tourism and hospitality industries, largely contributes to the availability of a large number of job opportunities, resulting in a high employment rate.

In contrast, Dunedin City ranks the lowest among the analysed regions, with a lower employment rate of 93.28% and a decline in ranking from 46th to 51st out of 67 districts. In large part this can be attributed to its high student population, relative to the general population.

1. Central Otago District:
    - The Central Otago District stood out as one of the top-performing districts in 2013, recording a high employment rate of 97.42%. The district improved its standing, with the rate rising to 97.86% by 2018.

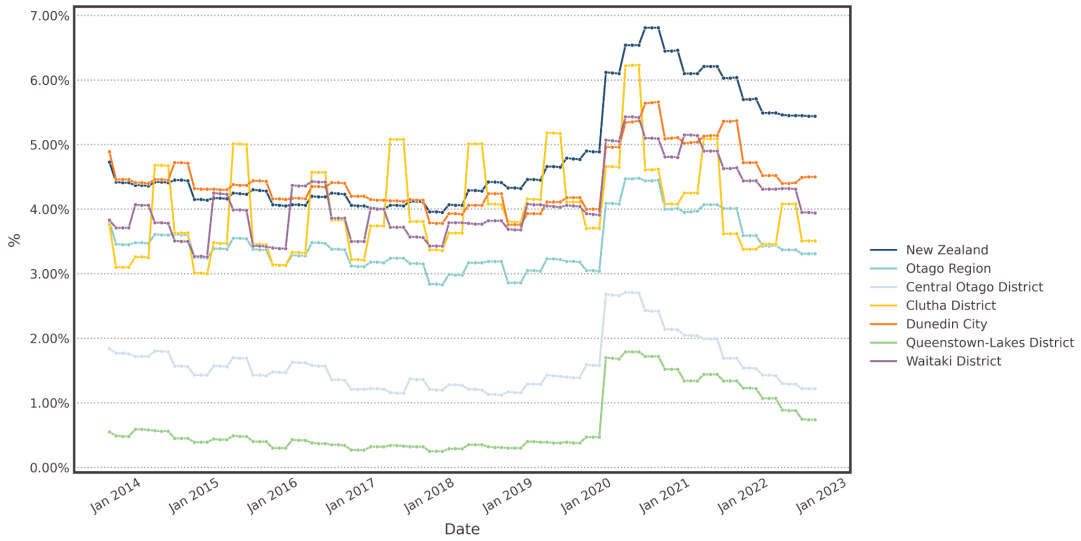
2. Clutha District:
    - In 2013, the Clutha District achieved a strong employment rate of 96.51% however, by 2018, there was a slight decline in the district's standing, as the rate decreased to 96.11%.

3. Dunedin City:
    - In 2013 Dunedin City had an employment rate of 92.47%. There was a slight improvement by 2018, as the rate increased to 93.28%.
    - Dunedin city came in under the national average in both years.

4. Queenstown-Lakes District:
    - The Queenstown-Lakes District had an employment rate of 97.51% in 2013 and increased to 98.65% by 2018.
    - Queenstown ranked second out of all districts in 2018, notably higher than the national average and other districts.

5. Waitaki District:
    - Waitaki had an employment rate of 96.11% in 2013, and by 2018 this increased slightly to 96.26%, coming in higher than the national average in both years.

Indicator 12: Job Seeker Support rate



Indicator 12 focuses on the Job Seeker Support rate in the Otago Region benchmarked against the New Zealand average and all other regions. This is a supplementary indicator of access to employment.

The Job Seeker Support rate for the total New Zealand population decreased from 6.04% to 5.44% between 2021 and 2022. The Otago Region's Job Seeker Support rate is the lowest of any region in the country at 3.31% and considerably under the national average. The region demonstrates relatively lower unemployment and higher employment rates compared to other regions, indicating a healthy job market and economic conditions.

In terms of Otago's territorial authorities, Queenstown Lakes District and Central Otago District perform exceptionally well, consistently ranking first and second respectively during both periods, reflecting positive employment opportunities and economic activity in the areas.

1. Central Otago District:
    - Ranking 2021: The Central Otago District ranks 2nd out of 66 districts in terms of the Job Seeker Support rate.
    - Value 2021: The Job Seeker Support rate for the Central Otago District was 1.69%.

- Ranking 2022: The Central Otago District maintains its ranking of 2nd out of 66 districts in 2022.
- Value 2022: The Job Seeker Support rate for the Central Otago District decreases to 1.22%.

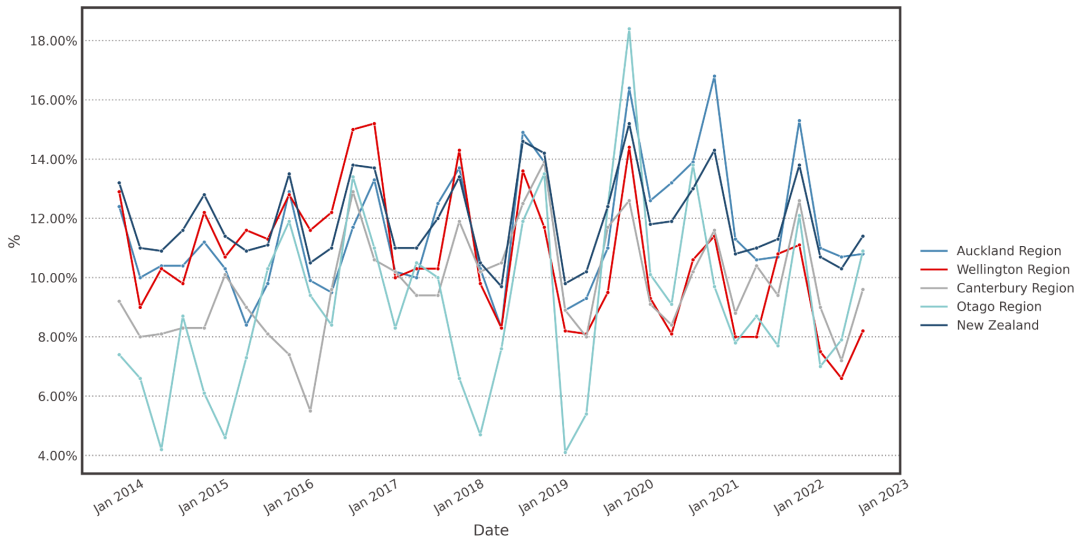
2. Clutha District:
    - Ranking 2021: The Clutha District ranks 9th out of 66 districts.
    - Value 2021: The Job Seeker Support rate for the Clutha District is 3.62%.
    - Ranking 2022: The Clutha District drops slightly to 10th out of 66 districts in 2022.
    - Value 2022: The Job Seeker Support rate for the Clutha District decreases to 3.51%.

3. Dunedin City:
    - Ranking 2021: Dunedin City ranks 26th out of 66 districts.
    - Value 2021: The Job Seeker Support rate for Dunedin City is 5.37%.
    - Ranking 2022: Dunedin City improves to the 23rd ranking out of 66 districts in 2022.
    - Value: The Job Seeker Support rate for Dunedin City decreases to 4.5%.

4. Queenstown-Lakes District:
    - Ranking 2021: The Queenstown-Lakes District ranks 1st out of 66 districts.
    - Value 2021: The Job Seeker Support rate for the Queenstown-Lakes District is 1.34%.
    - Ranking 2022: The Queenstown-Lakes District maintains its top ranking of 1st out of 66 districts in 2022.
    - Value 2022: The Job Seeker Support rate for the Queenstown-Lakes District further decreases to 0.74%.

5. Waitaki District:
    - Ranking 2021: The Waitaki District ranks 20th out of 66 districts in terms of the Job Seeker Support rate.
    - Value 2021: The Job Seeker Support rate for the Waitaki District is 4.64%.
    - Ranking 2022: The Waitaki District maintains its ranking of 20th out of 66 districts in 2022.
    - Value 2022: The Job Seeker Support rate for the Waitaki District decreases to 3.94%.

Indicator 13: Proportion of 15 to 24 year-olds Not in Education, Employment, or Training (NEET)

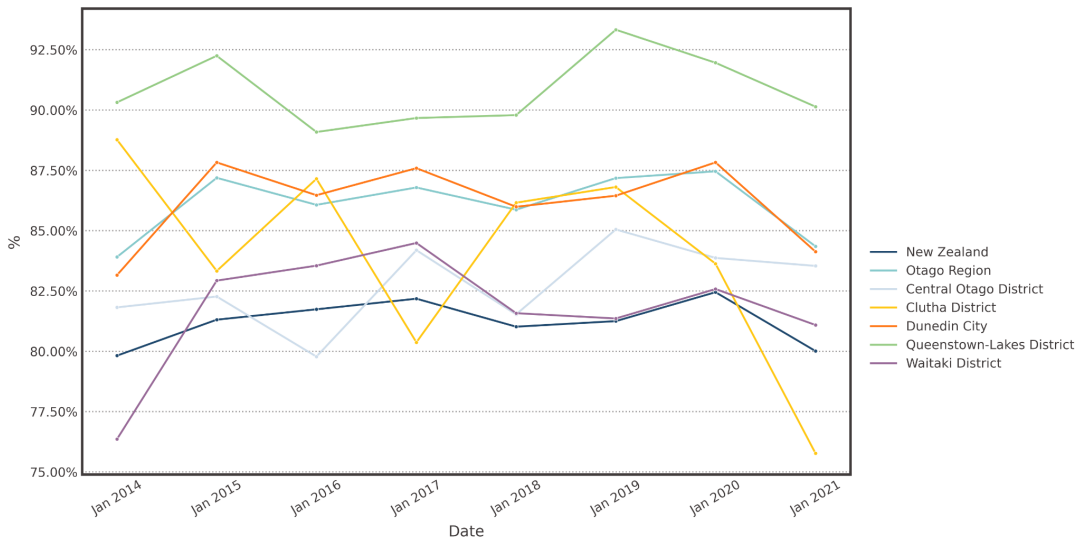


Indicator 13 focuses on the NEET rate, which represents the percentage of 15 to 24 year-olds not in education, employment, or training, in Otago benchmarked against the national average and largest regions of New Zealand. This is a supplementary measure of young people not developing or using human capital. The data is available at a national and regional level only, rather than territorial authority.

The New Zealand national average NEET rate decreased to 11.4% in 2022 from 13.2% in 2014. The Otago Region ranks 1st out of 12 regions in terms of the NEET rate in 2014 with a value of 7.4%, however by 2022 Otago drops to the 8th ranking out of 13 regions with an increased NEET rate of 10.9%.

Among the analysed regions, the Otago Region has consistently maintained a relatively lower NEET rate compared to the national average. However, over time, the Otago Region has experienced an increase in the NEET rate relative to Auckland, Canterbury and Wellington, which may indicate challenges in education, employment, and training opportunities for young individuals in Otago.

Indicator 14: School leavers with NCEA level 2 and above



This indicator focuses on the percentage of Otago school leavers who have achieved NCEA Level 2 or above between 2014 and 2021. This indicator is a headline measure of the flow of formal educational attainment.

In 2021, the national average of school leavers with NCEA Level 2 or above is 80.01%. The Otago Region has a higher percentage of school leavers with NCEA Level 2 or above compared to the national average, with a value of 84.35%. In 2014, the Otago Region ranked 3rd out of 16 regions and had the same ranking in 2021.

1. Central Otago District:
   - The Central Otago District has a percentage of 83.54% of school leavers with NCEA Level 2 or above in 2021, which increased from 81.82% in 2014.
   - In 2021, Central Otago ranked 10th out of 66 district's.

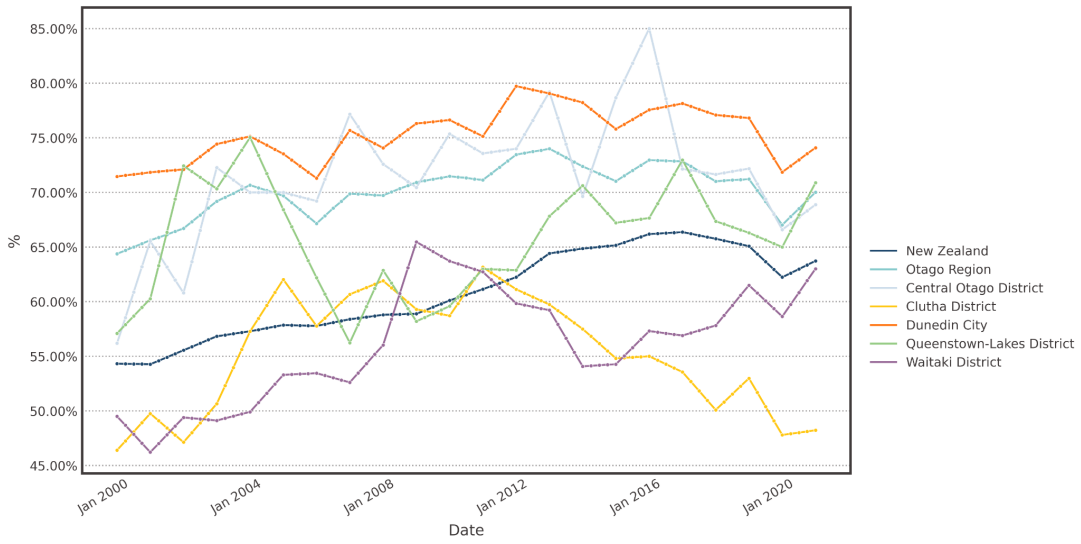
2. Clutha District:
   - The Clutha District has a lower percentage of school leavers with NCEA Level 2 or above compared to the national average, with a value of 75.77% in 2021. This was a significant decrease from 2014 where the percentage was 88.77%
   - In 2021 Clutha District ranked 47th out of 66 district's.

3. Dunedin City:
    - Dunedin City has a higher percentage of school leavers with NCEA Level 2 or above compared with the national average, with a value of 84.13%. Which was a minor increase from 83.16% in 2014.
    - In 2021, it improved its ranking to 8th out of 66 district's.

4. Queenstown-Lakes District:
    - The Queenstown-Lakes District has the highest performance within Otago, with 90.14% of school leavers achieving NCEA Level 2 or above. This was a small decrease compared to 90.32% in 2014.
    - In 2021 Queenstown-Lakes ranked 4th out of 66 districts.

5. Waitaki District:
    - The Waitaki District has a percentage of 81.09% of school leavers with NCEA Level 2 or above. This was an improvement from 76.36% in 2014.
    - The Waitaki District ranked 22nd out of 66 districts in 2021.

Indicator 15: School entrants with prior ECE



Indicator 15 reflects the rankings and values of the percentage of children in Early Childhood Education (ECE) in Otago benchmarked against the New Zealand population. We tracked the national, regional and territorial authority trend between 2014 and 2021. This indicator serves as a headline measure of school readiness.

The New Zealand benchmark shows that 63.73% of children were enrolled in Early Childhood Education in 2021. The Otago Region ranks third among the listed regions, with 70.02% of children enrolled in ECE. This indicates a relatively high enrollment rate in early childhood education compared to the New Zealand benchmark.

Dunedin City ranks the highest among all the listed regions and districts, with 74.09% of children enrolled in ECE. This indicates a strong emphasis on early childhood education and a high enrollment rate in the city. Dunedin's commitment to providing access to quality ECE programs and raising awareness about the importance of early education might contribute to its high ranking.

1. Central Otago District:
    - Central Otago District ranks thirteenth among the districts, with 68.88% of children enrolled in ECE. This suggests a successful enrolment rate in early childhood education in the district.

2. Clutha District:
    - Clutha District ranks lower compared to other territorial authorities at 61st out of 67 territorial authorities, with 48.23% of children enrolled in ECE.

3. Dunedin City:
    - Dunedin City ranks sixth among all of the listed districts, with 74.09% of children enrolled in ECE. This suggests a high enrollment rate in early childhood education in the city.

4. Queenstown-Lakes District:
    - Queenstown-Lakes District ranks ninth amongst all territorial authorities, with 70.89% of children enrolled in ECE. This indicates a relatively high enrollment rate in early childhood education in the district.

5. Waitaki District:
    - Waitaki District has 63.01% of children enrolled in ECE. While the enrollment rate is lower compared to higher-ranking regions, a considerable proportion of children are still enrolled in early childhood education in the district.

Indicator 16: Percentage of schools leavers enrolled in tertiary education as a proportion of the population

Area	Ranking 2021	% of Students in tertiary education 2021
New Zealand	N/A	64.79 %
Otago Region	1/16	72.78 %
Central Otago District	5/65	70.78 %
Clutha District	36/65	58.96 %
Dunedin City	1/65	76.13 %
Queenstown-Lakes District	2/65	75.88 %
Waitaki District	24/65	62.5 %

The data is displayed in a table as it only exists for the year 2021 down to a TA level.

Indicator 16 measures the rankings and the percentage of school leavers enrolled in tertiary education in the Otago Region in 2021, as well as each constituent territorial authority, benchmarked against the general New Zealand population. This is a headline measure of the flow of formal educational attainment.

The New Zealand benchmark shows that 64.79% of school leavers were enrolled in tertiary education in 2021. The Otago Region ranks the highest amongst all New Zealand regions, with 72.78% of school leavers enrolled in tertiary education. This indicates a very high participation rate in pursuing higher education in the region. Dunedin City, Queenstown-Lakes and Central Otago District rank particularly strongly at first, second and fifth relative to all other territorial authorities.

Clutha and Waitaki rank lower, indicating more support is required in these regions in order for young people to attain formal tertiary qualifications. Dunedin City's strong result, ranking first among all the listed regions and districts, indicates a strong emphasis on higher education and a

higher proportion of school leavers continuing their studies in tertiary institutions. This can be attributed to the presence of the University of Otago. The university's local presence, strong reputation and tertiary offerings likely contribute to the higher enrollment rates in the region.

1. Central Otago District:
    - The Central Otago District ranks fifth among all territorial authorities, with 70.78% of school leavers enrolled in tertiary education. This suggests a significant proportion of school leavers in the district continue their education in tertiary institutions.

2. Clutha District:
    - The Clutha District ranks lower compared to other regions, with 58.96% of school leavers enrolled in tertiary education.

3. Dunedin City:
    - Dunedin City ranks the highest among all territorial authorities, with 76.13% of school leavers enrolled in tertiary education.

4. Queenstown-Lakes District:
    - The Queenstown-Lakes District ranks second among all territorial authorities, with 75.88% of school leavers enrolled in tertiary education.

5. Waitaki District:
    - The Waitaki District ranks lower among the listed areas, with 62.5% of school leavers enrolled in tertiary education. While the participation rate is lower compared to higher-ranking regions, there is still a considerable proportion of school leavers pursuing higher education in the district.

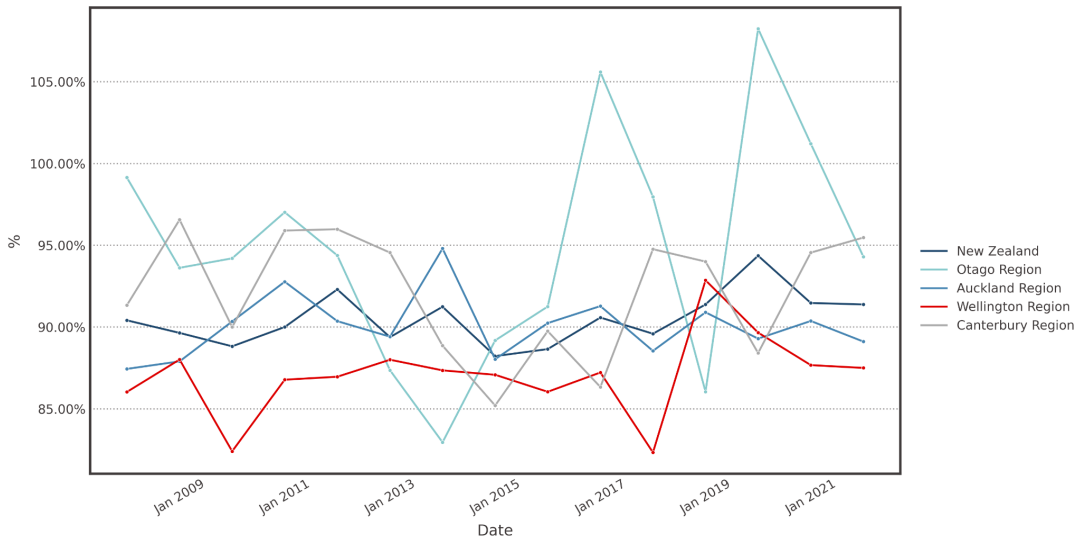
Indicator 17: Median hourly earnings as a percentage of mean hourly earnings

This indicator presents the rankings and values of median hourly earnings as a percentage of mean hourly earnings in Otago benchmarked against New Zealand and other regions. The indicator serves as a headline indicator of the distribution in incomes.

There is a high amount of variation over time of this indicator and it is recommended to revise this indicator in future iterations of this report.

The New Zealand average median hourly earnings was at 79.91% of mean hourly earnings in 2022.

Indicator 18: Māori median hourly earnings as a percentage of non-Māori median hourly earnings



This indicator presents the rankings and values of Māori median hourly earnings as a percentage of non-Māori median hourly earnings in different regions of New Zealand, and serves as a supplementary indicator regarding the distribution of income. A score of 100% reflects pay parity between Māori and non-Māori median hourly earnings.

The New Zealand benchmark demonstrates a relatively high level of Māori economic parity, with the percentage of Māori median hourly earnings compared to non-Māori median hourly earnings at 91.24% in 2014, increasing to 91.38% in 2022. This trend is heading in the right direction however New Zealand still requires some work to narrow the gap.

The Otago Region was initially ranked the lowest in 2014, indicating a significant gap in Māori economic parity with a percentage of 82.95%. However, by 2022 it improved its ranking to 6th with a considerable increase to 94.3%. This improvement suggests efforts towards narrowing the economic disparity between Māori and non-Māori communities in the region and should continue their efforts.

Otago sits above Auckland and Wellington, but sits below Canterbury, with Canterbury having the highest Māori median hourly earnings compared to non-Māori median hourly earnings (95.47%) by 2022.

Indicator 19: Female median hourly earnings as a percentage of male median hourly earnings

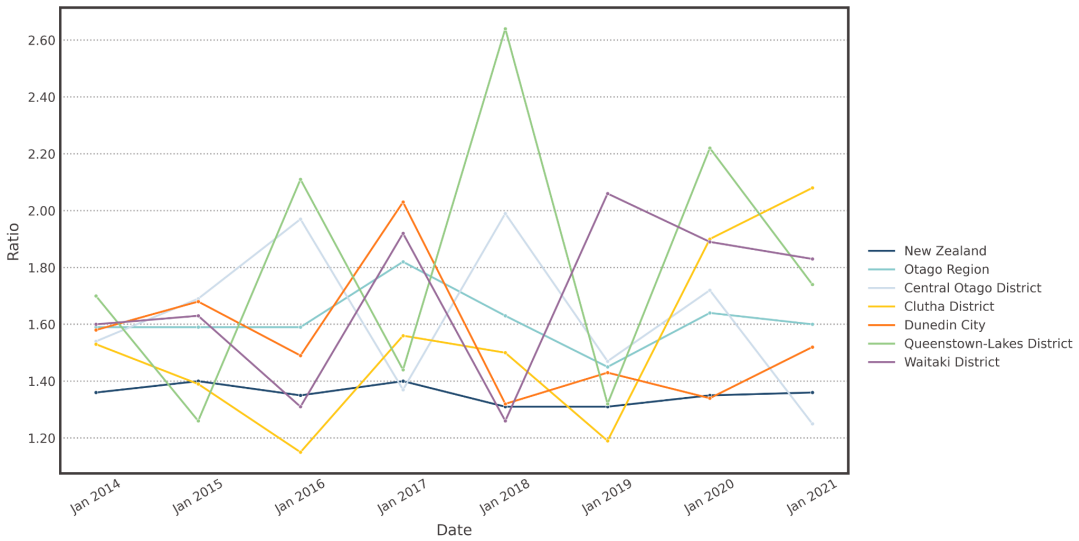
This indicator uses analysis of female median hourly earnings as a percentage of male median hourly earnings to determine how Otago ranks in terms of gender pay equity relative to New Zealand and other regions. A value of 100% reflects pay parity between female and male median hourly earnings.

The New Zealand benchmark shows a relatively high level of gender pay equity, with the percentage of female median hourly earnings compared to male median hourly earnings increasing from 90.57% in 2014 to 92.93% in 2022.

The Otago Region ranks relatively well in eighth place in terms of gender pay equity compared to other regions and has shown consistent improvement over time. Otago demonstrated an improvement in the percentage of female median hourly earnings compared to male median hourly earnings from 88.3% in 2014 to 93.13% in 2022. Otago sits behind the regional leader Auckland and

slightly behind Wellington, but Otago's female median earnings as a percentage of male earnings is higher than Canterbury's.

Indicator 20: Ratio of the proportion of males leaving with NCEA level 2 as their highest qualification, compared to the proportion of females



This indicator focuses on the percentage of Otago males leaving school with NCEA Level 2 compared to females, compared with different regions of New Zealand. This serves as an indicator of the distribution of knowledge outcomes.

The national average ratio of males leaving school with NCEA Level 2 compared to females is 1.36. The Otago Region has a higher percentage of males leaving school with NCEA Level 2 compared to females, with a value of 1.6.

1. Central Otago District:
    - The Central Otago District has a ratio of 1.25 of males leaving with NCEA Level 2 compared to females.
    - In 2021, the Central Otago District ranked 17th out of 66 districts.

2. Clutha District:
    - The Clutha District has a significantly higher percentage of males leaving with NCEA Level 2 compared to females, with a ratio of 2.08.
    - Clutha District ranked 61st out of 66 districts in 2021.

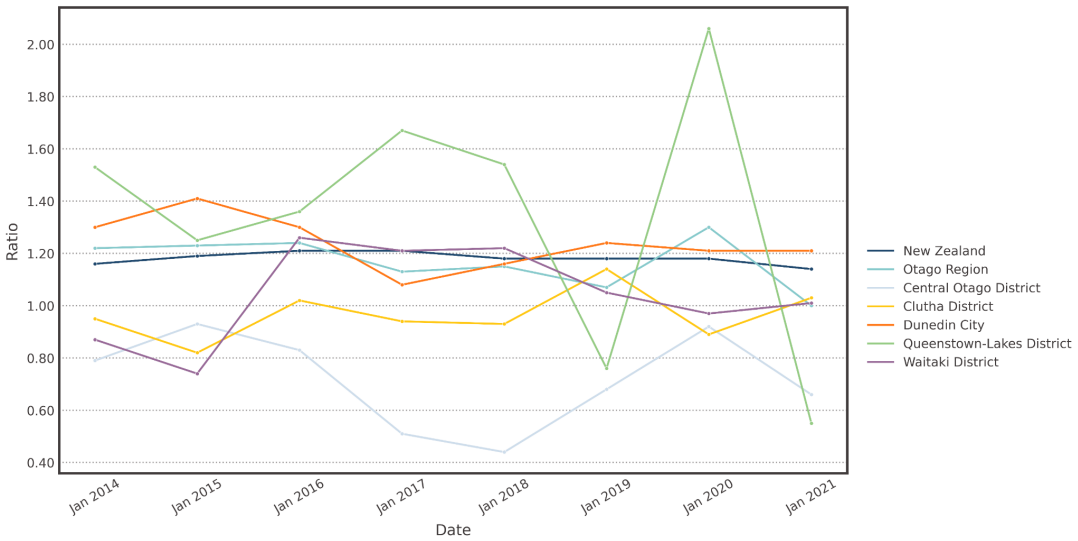
3. Dunedin City:
    - Dunedin City has a ratio of 1.52 of males leaving with NCEA Level 2 compared to females.
    - Dunedin City ranked 39th out of 66 districts in 2021.

4. Queenstown-Lakes District:
    - The Queenstown-Lakes District also has a higher percentage of males leaving with NCEA Level 2 compared to females, with a ratio of 1.74.
    - Queenstown-Lakes District ranked 51st out of 66 districts in 2021.

5. Waitaki District:
    - The Waitaki District has a ratio of 1.83 of males leaving with NCEA Level 2 compared to females.
    - Waitaki District ranked 56th out of 66 districts in 2021.

Overall, among the analysed regions, the Clutha District has the highest percentage of males leaving with NCEA Level 2 compared to females, indicating a significant gender gap in educational attainment.

Indicator 21: Ratio of the proportion of Māori leaving with NCEA level 2 as their highest qualification, compared to the proportion of the total population



Education plays a crucial role in shaping individuals' future prospects and opportunities. A key indicator of educational achievement is the ratio of Māori students who achieve a NCEA Level 2 qualification compared to the total population. NCEA Level 2 is an important milestone that signifies a certain level of educational attainment. This section analyses the data from 2014 and 2021 across different regions and territorial authorities. A ratio of 1.0 reflects an even proportion of Maori versus the total population leaving with NCEA level 2 as their highest qualification.

1. New Zealand:
   - In 2014, the ratio of Māori students leaving with NCEA Level 2 was 1.16 compared to the total population.
   - By 2021, this percentage decreased slightly to 1.14.

2. Otago Region:
   - In 2014, Otago Region ranked 11th out of 16 regions, with Māori students achieving a ratio of 1.22 for NCEA Level 2.
   - By 2021, Otago Region improved its ranking to 4th place, with a ratio of 1.0.

3. Central Otago District:
    - In 2014, Central Otago District ranked 11th out of 66 territorial authorities, with Māori students achieving a ratio of 0.79 for NCEA Level 2.
    - By 2021, the district improved its ranking to 5th ranked, with a ratio of 0.66.

4. Clutha District:
    - In 2014, Clutha District ranked 24th out of the 66 territorial authorities, with Māori students achieving a ratio of 0.95 for NCEA Level 2.
    - By 2021, the district's ranking slightly declined to 33rd place, with a ratio of 1.03.

5. Dunedin City:
    - In 2014, Dunedin City ranked 58th out of 66 territorial authorities, with Māori students achieving a ratio of 1.3 for NCEA Level 2.
    - By 2021, the city's ranking remained similar at 60th place, with a ratio of 1.21.

6. Queenstown-Lakes District:
    - In 2014, Queenstown-Lakes District ranked 64th out of 66 territorial authorities, with Māori students achieving a ratio of 1.53 for NCEA Level 2.
    - However, by 2021, the district significantly improved its ranking to 2nd place, with a ratio of 0.55.

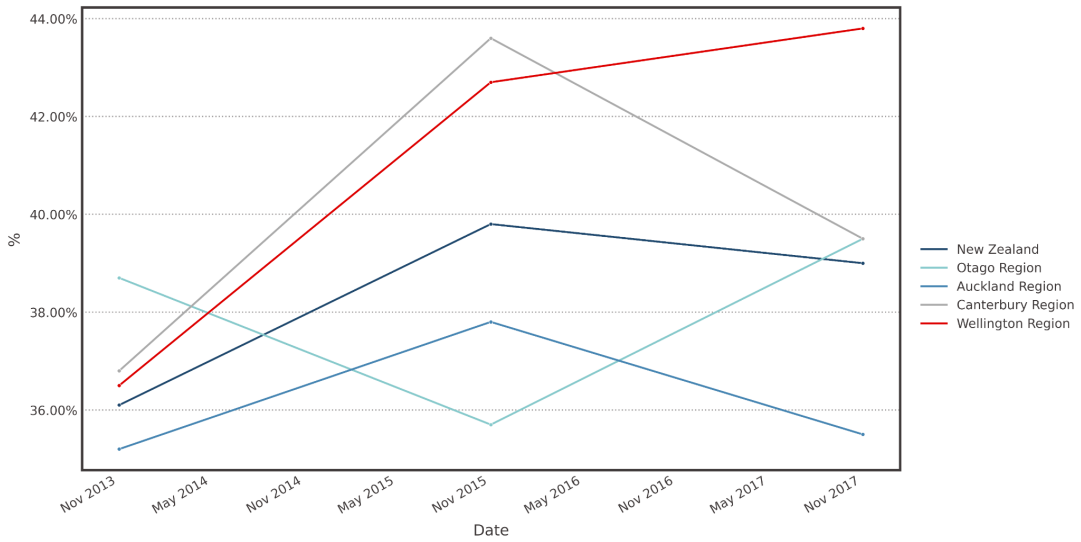
7. Waitaki District:
    - In 2014, Waitaki District ranked 15th out of 66 territorial authorities, with Māori students achieving a ratio of 0.87 for NCEA Level 2.
    - By 2021, the district's ranking declined to 27th place, with a ratio of 1.01.

Dimension 3: Connected communities

Indicator summary for the Otago Region

Indicator 22: Proportion of the population who reported feeling lonely some/most/all of the time

Indicator 22: Proportion of the population who reported feeling lonely some/most/all of the time



Indicator 22 focuses on the proportion of the population reporting feeling lonely some/most/all of the time and serves as a headline measure of connectedness. By examining the trends in feelings of loneliness over time and comparing different regions, policymakers can gain a better understanding of the factors that contribute to loneliness and the effectiveness of existing social support systems.

1. New Zealand:
    - The overall proportion of the population reporting loneliness increased from 36.1% in 2014 to 39.0% in 2018. This suggests a growing prevalence of loneliness at the national level.

2. Otago Region:
    - In 2014, Otago ranked 12th out of 12 regions, with 38.7% of the population reporting loneliness.
    - In 2018, its ranking moved to 4th, with an increase in the percentage to 39.5%.

3. Auckland Region:
    - In 2014, Auckland had 35.2% of the population reporting loneliness.
    - In 2018, Auckland saw a slight increase to 35.5% reporting loneliness.

4. Canterbury Region:
    - In 2014, Canterbury had 36.8% reporting loneliness.
    - This ranking remained consistent across the observed years, while the actual proportion of loneliness increased to 39.5%.

5. Wellington Region:
    - Wellington experienced a significant increase in feelings of loneliness, with 36.5% reporting loneliness in 2014.
    - However, by 2018, it had a notable rise to 43.8%.
    - These results suggest a concerning trend of increasing loneliness levels in Wellington.

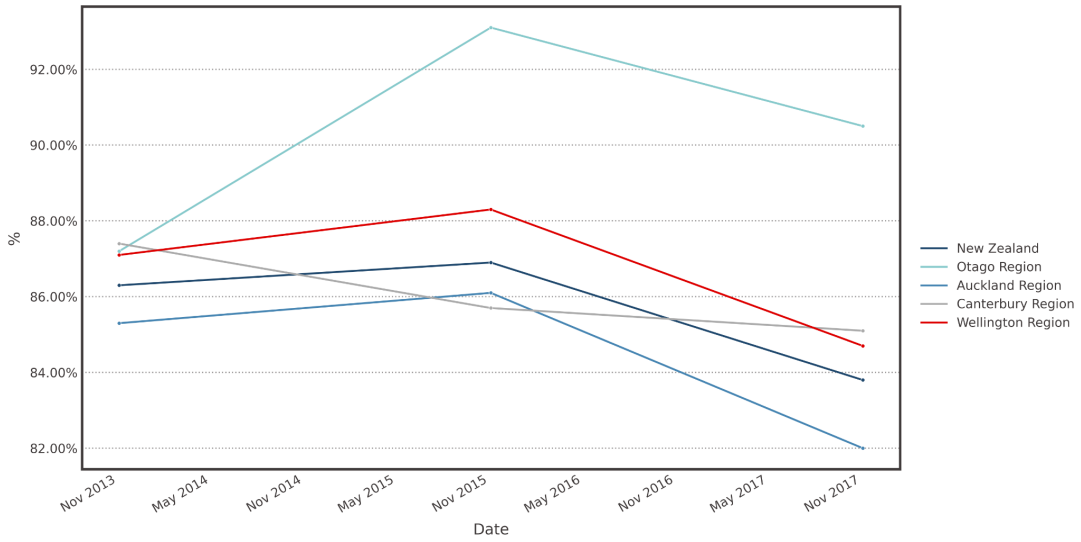
Overall, the data reflects varying levels of loneliness across different regions of New Zealand, with Otago and Canterbury demonstrating similar levels to the New Zealand proportion in 2018. Auckland had relatively lower levels and Wellington experienced a notable increase of loneliness. These findings can help inform policymakers and community stakeholders in developing strategies and interventions to promote connectedness and combat loneliness in specific regions.

Dimension 4: Belonging and identity

Indicator summary for the Otago Region

Indicator 23: Proportion of the population reporting it easy or very easy to express their identity	✓
Indicator 24: Proportion of the population speaking Te Reo Māori	!
Indicator 25: Proportion of Otago Māori population speaking Te Reo Māori	!

Indicator 23: Proportion of the population reporting it easy or very easy to express their identity



This section reports on the proportion of the population reporting it is easy or very easy to express their identity, which serves as the best available indicator for individual and shared identity. Here we compare the data covering two time periods, 2014 and 2018.

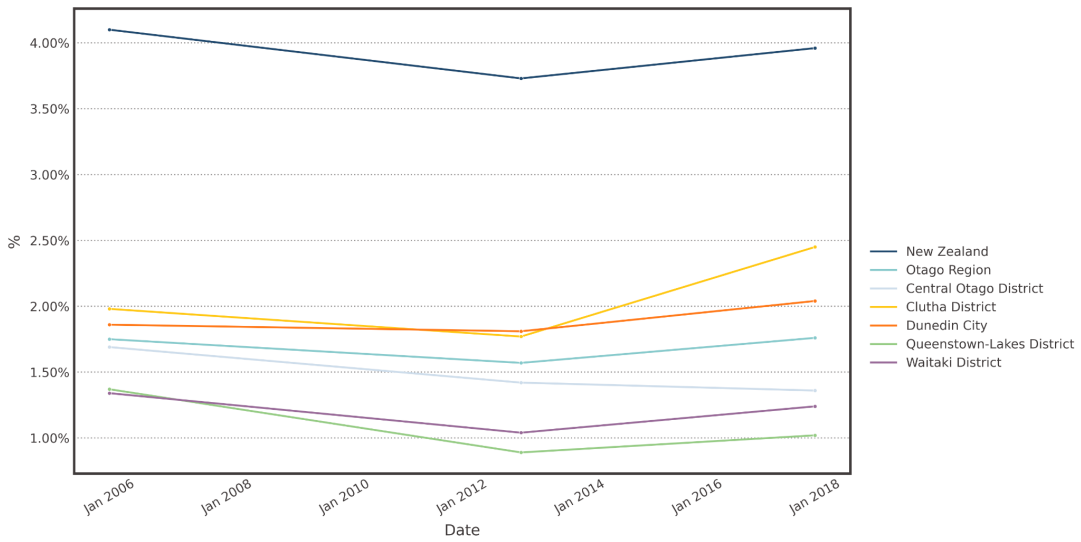
New Zealand demonstrates a high level of ease in expressing identity, with 86.3% of the population reporting it easy or very easy in 2014. However, there was a slight decline to 83.8% in 2018. Among the regions examined, Otago stands out with consistently high percentages, ranking 6th in 2014 at

87.2% and improving again to 2nd place in 2018 at 90.5%. This indicates a positive environment where individuals feel comfortable expressing their identity.

Auckland, Canterbury, and Wellington also exhibit favourable results, with ease of expressing identity percentages of 85.3%, 87.4%, and 87.1% in 2014, respectively. However, there were slight declines in Auckland (-3.3%) and Wellington (-2.4%) in 2018, suggesting the need for continued efforts to support individuals in expressing their identity in these regions.

The data reflects a generally positive environment in New Zealand for expressing identity, with Otago showcasing consistently high percentages and notable improvement over time. While Auckland, Canterbury, and Wellington also exhibit favourable results, the slight declines in Auckland and Wellington emphasise the importance of ongoing support to foster an inclusive and supportive atmosphere for individuals to express their identity.

Indicator 24: Proportion of the population speaking Te Reo Māori



Te Reo Māori, the indigenous language of Aotearoa New Zealand, holds profound cultural significance, representing the identity, traditions, and values of the Māori people. By integrating Te Reo Māori into education, community engagement, and public discourse, we contribute to its preservation and empower Māori communities, fostering a society that embraces cultural diversity

and intercultural understanding. The data provided here focuses on the proportion of the Otago population who speak Te Reo, serving as an indicator of shared identity and belonging. Analysing the rankings and values from 2013 to 2018 offers insights into the prevalence of Te Reo usage within different areas of Otago.

1. New Zealand:
    - Across New Zealand, the proportion of the population speaking Te Reo increased from 3.73% in 2013 to 3.96% in 2018, reflecting modest growth.

2. Otago Region:
    - The Otago Region consistently ranked lower in terms of Te Reo usage compared to other regions, placing 16th out of 16 regions in 2013 with a percentage of 1.57% and maintaining the last rank in 2018 with a slight increase to 1.76%.

3. Central Otago District:
    - Within the Central Otago District, the proportion of Te Reo speakers was relatively low, ranking 61st out of 67 territorial authorities in 2013 with 1.42% and experiencing a slight drop to 62nd in 2018 with 1.36%.

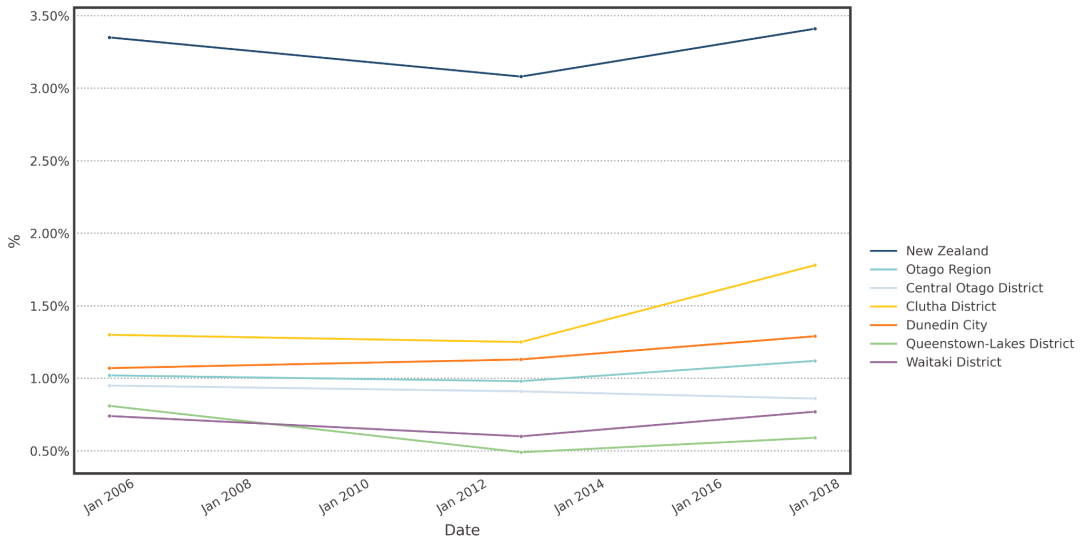
4. Clutha District:
    - The Clutha District displayed a higher proportion of Te Reo speakers compared to other TA's within the Otago Region, ranking 54th out of 67 territorial authorities in 2013 with 1.77% and improving to 44th in 2018 with 2.45%.

5. Dunedin City:
    - In the Dunedin City area, the percentage of Te Reo speakers was moderate, ranking 53rd in 2013 with 1.81% and maintaining that ranking in 2018, with a slight increase to 2.04%.

6. Queenstown-Lakes District:
    - The Queenstown-Lakes District had the lowest proportion of Te Reo speakers of all districts, consistently ranking last among the districts in both 2013 and 2018, with 0.89% and a slight increase to 1.02%, respectively.

7. Waitaki District:
    - The Waitaki District, while still presenting a relatively low proportion, experienced a slight growth in Te Reo usage, ranking 66th in 2013 with 1.04% and improving to 65th in 2018 with 1.24%.

Indicator 25: Proportion of Otago Māori population speaking Te Reo Māori



Indicator 25 shows the proportion of the Otago Māori population who speak Te Reo, serving as an indicator of Māori identity and the intergenerational sustainability of Te Reo Māori. The contrasting rankings and values from 2013 to 2018 have been used to analyse the prevalence of Te Reo usage within specific areas of Otago. The data highlights the challenges faced in sustaining Te Reo Māori within the Māori population of New Zealand. Efforts to revitalise and promote the use of Te Reo should be a priority, particularly in areas where the proportion of speakers is lower.

1. New Zealand:
    - In New Zealand as a whole, the proportion of Māori individuals speaking Te Reo increased from 3.08% in 2013 to 3.41% in 2018, reflecting a modest growth in the preservation of the language.

2. Otago Region:
    - Among the regions, the Otago Region consistently ranked lower in terms of Te Reo usage. In 2013, it had a proportion of 0.98%, placing it 15th out of 16 regions. By 2018, the proportion slightly increased to 1.12%, resulting in the last rank among the regions. This highlights the challenges faced in sustaining Te Reo Māori within the Otago Māori population.

3. Central Otago District:
    - Within the Central Otago District, the proportion of Te Reo speakers was relatively low. In 2013, it ranked 58th out of 67 territorial authorities with a proportion of 0.91%. By 2018, the proportion further decreased to 0.86%, resulting in a rank of 62nd.

4. Clutha District:
    - The Clutha District in 2013 ranked 52nd with a proportion of 1.25%. By 2018, the proportion improved slightly to 1.78%, resulting in a rank of 48th.

5. Dunedin City:
    - In Dunedin City, the proportion of Te Reo speakers in 2013 was 1.13%, where it ranked 54th. In 2018, the proportion increased slightly at 1.29%, resulting in a rank of 53rd.

6. Queenstown-Lakes District:
    - The Queenstown-Lakes District had the lowest proportion of Te Reo speakers, consistently ranking last among the districts. In 2013, it had a proportion of 0.49%, which slightly increased to 0.59% in 2018, resulting in a rank of 66th.

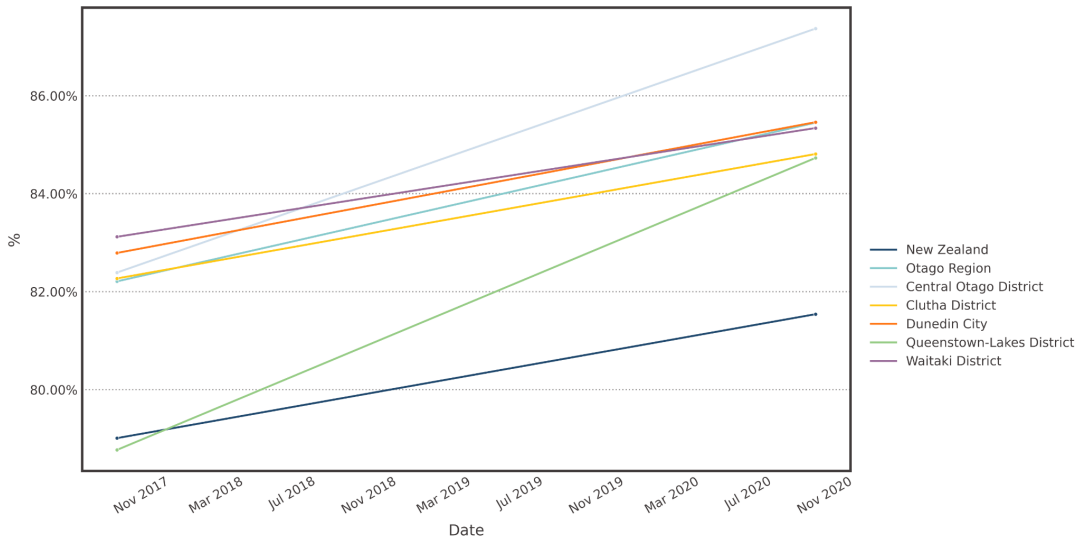
7. Waitaki District:
    - The Waitaki District, while still presenting a relatively low proportion, experienced a slight growth in Te Reo usage. In 2013, it ranked 66th with a proportion of 0.6%, and by 2018, the proportion improved to 0.77%, resulting in a rank of 65th.

Dimension 5: Participation and governance

Indicator summary for the Otago Region

Indicator 26: Voter turnout rate in general elections	✓
Indicator 27: Mean trust in health, education, and policy institutions	✓
Indicator 28: Mean generalised trust	✓

Indicator 26: Voter turnout rate in general elections



The voter turnout rate in general elections data provides insight to the level of participation and engagement of citizens in the democratic process, reflecting their trust and belief in the electoral system. Analysing the data from 2017 and 2020, we can summarise the findings as follows:

1. New Zealand:
    - New Zealand, as a whole, demonstrates a positive trend in voter turnout rates.
    - In 2017, the country had a turnout rate of 79.01%, which increased to 81.54% in 2020, indicating a growing level of confidence and participation in the democratic process.

2. Otago Region:
    - The Otago Region exhibited a consistently high level of voter turnout. In 2017, it had a turnout rate of 82.21%, ranking 3rd out of 16 regions.
    - By 2020, its turnout rate increased to 85.45%, securing the 2nd rank. This suggests a strong level of participation and trust in the democratic institutions within the region.

3. Clutha District:
    - Clutha District had a notable voter turnout rate in 2017 of 82.27%, ranking 19th out of 67 territorial authorities.
    - In 2020, its turnout rate increased to 84.81%, placing it in the 21st rank. This indicates a solid level of civic engagement and trust in the democratic process within the Clutha District.

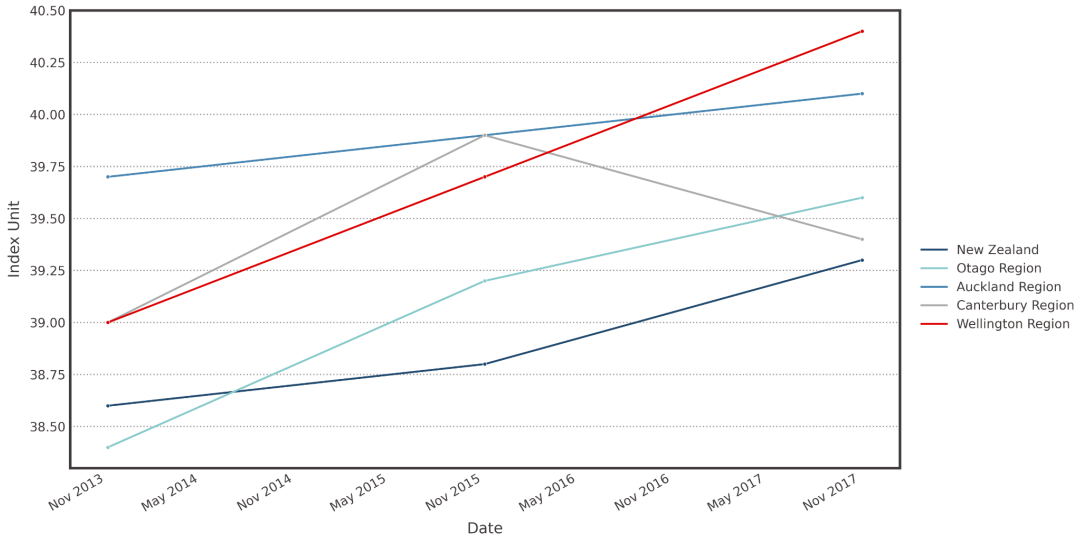
4. Dunedin City:
    - In the Otago Region, Dunedin City showcased a consistently high level of voter turnout. In both 2017 and 2020, it had a turnout rate of 82.79%, securing the 14th rank out of 67 territorial authorities.
    - This reflects a strong sense of civic participation and trust in the democratic institutions within Dunedin City.

5. Queenstown-Lakes District:
    - Within the Otago Region, the Queenstown-Lakes District also demonstrated a commendable voter turnout rate. In 2017, it had a turnout rate of 78.77%, ranking 43rd out of 67 territorial authorities.
    - In 2020, its turnout rate significantly increased to 84.73%, improving its ranking to 22nd place. This indicates a notable increase in civic engagement and trust in the democratic process within the Queenstown-Lakes District.

6. Waitaki District:
    - The Waitaki District also showcased a consistently high level of voter turnout. In 2017, it had a turnout rate of 83.12%, ranking 10th out of 67 territorial authorities.

- By 2020, its turnout rate increased to 85.34%, placing it in the 15th rank. This highlights a solid level of civic participation and trust in the democratic process within the Waitaki District.

Indicator 27: Mean trust in health, education, and policy institutions



Indicator 27 is the mean trust in health, education, and policy institutions, and serves as the headline indicator of trust in service delivery institutions. Here we compare rankings and values from 2014 to 2018 to provide insights into the level of trust across different regions.

In New Zealand, the overall mean trust value increased from an index level of 38.6 in 2014 to 39.3 in 2018, indicating a moderate level of trust. The Otago Region consistently maintained trust levels, with a mean value of 38.4 in 2014 and 39.6 in 2018. Otago ranked 4th out of 13 regions in 2014 and improved to 3rd rank in 2018.

The Auckland Region exhibited one of the highest levels of trust over the compared years. In 2014, Auckland had a mean trust value of 39.7 index units, ranking 1st among the regions. In 2018, it maintained a strong level of trust with a value of 40.1 index units, ranking 2nd.

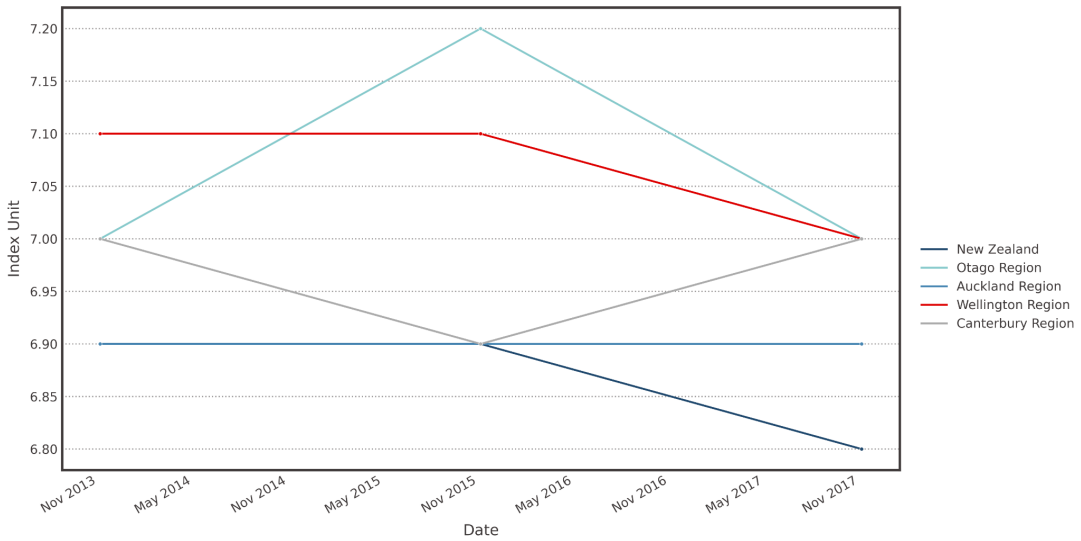
Similarly, in 2014, the Canterbury Region displayed a mean trust value of 39.0 index units, securing the 2nd rank among the regions. However, by 2018, it experienced a drop in ranking to 4th place. In

2018, the region maintained a solid level of trust with a value of 39.4 index units, but dropped to 4th ranked due to other regions' increase in mean trust. The Canterbury region indicates consistent trust level in service delivery institutions.

The Wellington Region consistently showcased a high level of trust, ranking 3rd in 2014 with a mean trust value of 39.0 index units. In 2018, it claimed the top rank with an increased value of 40.4 index units.

Overall, the data highlights variations in trust across regions, with Auckland and Wellington exhibiting higher levels of trust, with Otago and Canterbury maintaining solid levels of trust in service delivery institutions. These findings emphasise the importance of nurturing and sustaining trust in order to ensure effective service provision in health, education, and policy sectors.

Indicator 28: Mean generalised trust



Indicator 28 provides insight to the mean generalised trust data which gives valuable insights into the level of social capital within a community. Social capital refers to the trust, cooperation, and connections among individuals that contribute to the overall well-being and functioning of a society.

1. New Zealand:
    - New Zealand demonstrates a relatively high level of mean generalised trust. In 2014, it had a mean trust score of 6.9 and then by 2018, there was a slight decrease in the mean trust score to 6.8 index units.

2. Otago Region and Canterbury Region:
    - The Otago Region and Canterbury Region both ranked 2nd equal of the 12 regions 2014, reflecting a mean trust score of 7.0 index units.
    - By 2018, they both achieved a first equal ranking (along with Wellington), indicating a consistent level of social capital and trust within the communities.
    - Over both years, Otago and Canterbury achieved a higher mean generalised trust rate than the national benchmark.

3. Auckland Region
    - In 2014, the Auckland Region had a mean trust score of 6.9 index units, ranking 5th out of the regions. Then in 2018, it improved its ranking to 4th while maintaining the same mean trust score of 6.9 index units. This suggests a stable level of social capital within the region.

4. Wellington
    - The Wellington Region demonstrates the highest level of mean generalised trust among the analysed regions. In 2014, it had a mean trust score of 7.1 index units.
    - In 2018, it maintained its ranking, while the mean trust score also remained relatively high at 7.0 index units.
    - The Wellington Region maintains a high level of social capital. In both years, Wellington achieved a higher mean generalised trust rate than the national benchmark.

Dimension 6: A healthy natural environment

Indicator summary for the Otago Region

Indicator 30: Percentage of swimming sites deemed safe	!
Indicator 31: Tonnes of carbon dioxide equivalent gas emissions per capita	!

Please note: Certain environmental indicators in the report are subject to limitations due to the sampling sites and sampling rates of their data, such as the data obtained from the Land, Air, Water Aotearoa (LAWA) program. These limitations arise from factors such as the distribution of monitoring stations and the frequency of data collection. While the provided data can still offer valuable insights into trends and patterns, it is important to acknowledge these limitations and their potential impact on the accuracy and representativeness of the indicators.

In this report, we pursued the following indicators as a first attempt for baseline measurement. For various reasons they are unlikely to be adequate, and we have concerns regarding the accuracy and representativeness of the indicators. We report them here for completeness.

The environmental indicators in the report, obtained and aggregated from the Land, Air, Water Aotearoa (LAWA) programme, have limited utility at a region/district level. There are limitations that arise from factors such as the distribution of monitoring stations and the frequency of data collection. Water quality and air quality data are specific to particular sites. The data cannot be readily aggregated to a district level in a way that is meaningful for scientific use.

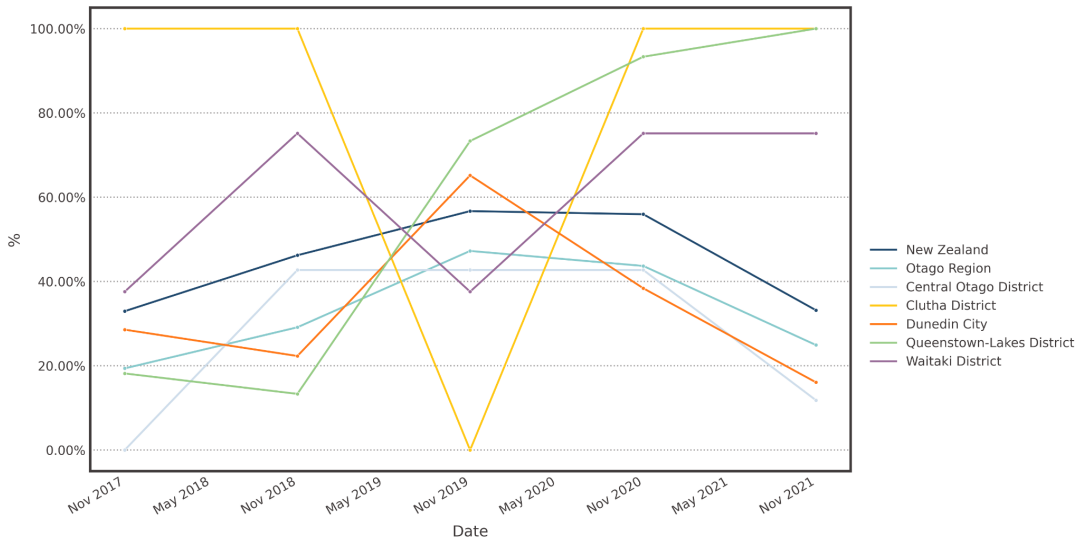
The indicator 30 below is therefore purely a comparison of aggregated data between districts to provide a rough district by district comparison.

Future iterations of this report will build on this experience, and look to determine more useful aggregate measures for environmental health.

Indicator 29: Mean PM10 concentration in micrograms per cubic metre

Indicator 29 includes data from only seven sites in Otago. ORC deliberately measures this data at sites with known air quality issues. This makes aggregation to a district level of limited use. For this reason we have currently left this indicator blank. We are aware that both the Ministry for the Environment and Environmental Health Intelligence New Zealand have done some work in developing data at a district level, which we hope to include as it becomes available.

Indicator 30: Percentage of swimming sites deemed safe



Indicator 30 focuses on the percentage of measured swimming sites that are safe, which serves as a potential headline measure of water quality used in environmental reporting by the Ministry for the Environment (MfE) and Statistics New Zealand. Here we will compare the rankings and values of data from the years 2018-2022 of safe swimming sites across different regions in New Zealand. By examining the trends and changes over time, we can assess the effectiveness of water quality management efforts and the effectiveness of environmental measures in ensuring safe recreational water facilities.

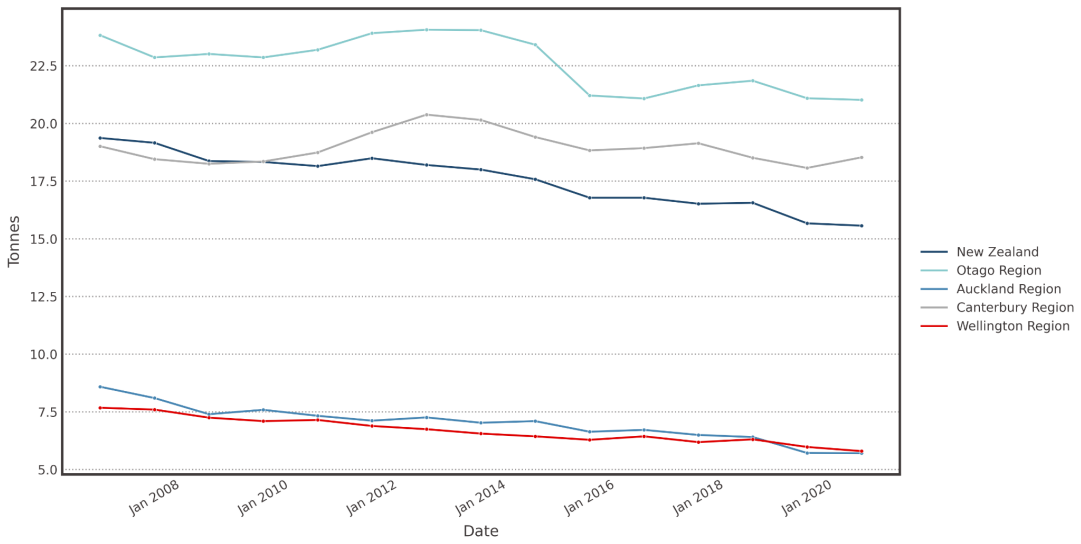
It is important to note, Contact recreation, while it is a relatable measure for public communication and is used in the NPSFM, has some difficulties as a statistical measure. Criteria for a safe swimming site is very stringent. Some sites are good nearly all the time but can be drastically

altered by transient events. Key among these is that sampling is very susceptible to the influence of climate conditions, especially rain events. Differences in results between years are therefore not necessarily meaningful. This is borne out in current ORC SOE reporting.
We note that the improvement in results for the Queenstown Lakes District is likely a result of improvement in sampling methods.

The dramatic swing in results for the Clutha District is likely a result of aggregation being susceptible to a limited number of poor sampling results. The two sites sampled in the district (Kaka Point and Pounawea) are listed as “Excellent” and “Fair” on the LAWA site. Comparisons between sites must be made with caution, given the drastically different conditions at those sites.

With the above caveats, we can comment that the national average for safe swimming sites has remained stable but low. In Otago, 70% of sites monitored have a ‘fair’ to ‘excellent’ long-term grade.

Indicator 31: Tonnes of carbon dioxide equivalent gas emissions per capita



Indicator 31 focuses on CO2 emissions per capita, a critical measure of atmospheric outcomes related to climate change and a significant indicator of sustainability. This section looks at the data range specifically from 2014 to 2021, comparing the values of CO2 emissions per capita for different regions in New Zealand. By examining these over time, we can gain insights into the

outcomes of initiatives and identify areas that have made progress or face challenges in reducing carbon emissions.

The data reveals varying levels of sustainability and progress across different regions in New Zealand. Auckland and Wellington consistently display lower carbon emissions per capita, and set the benchmark for other regions such as Otago and Canterbury to follow. However overall, New Zealand as a whole and all regions display a continued downward trend, which is positive to acknowledge.

1. New Zealand:
    - In 2014, the emissions were recorded at 18.0 tonnes per capita, which decreased to 15.57 tonnes per capita in 2021.

2. Otago Region:
    - In 2014, Otago ranked 9th out of 16 regions, with 24.04 tonnes per capita.
    - However, over time, the region showed improvement and reduced its emissions to 21.02 tonnes per capita by 2021, ranking 10th out of 16 regions.

3. Auckland Region:
    - In 2014, the region ranked 2nd out of 16 regions, with 7.03 tonnes per capita.
    - By 2021, it further reduced emissions to 5.71 tonnes per capita, securing the top rank.

4. Canterbury Region:
    - In 2014, Canterbury ranked 8th out of 16 regions, with 20.15 tonnes per capita, and maintained a similar level with 18.53 tonnes per capita in 2021, holding the 8th rank.

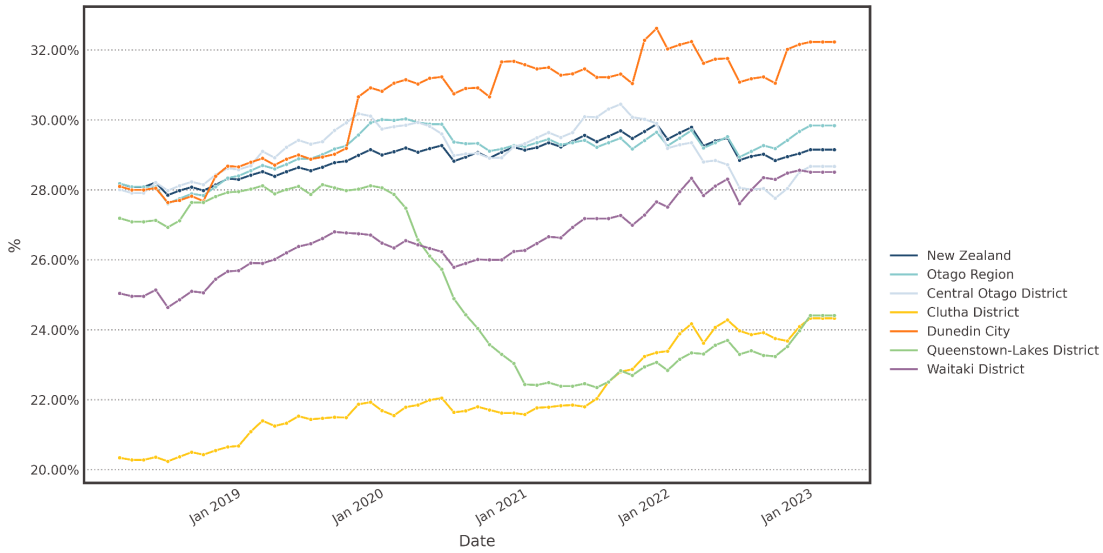
5. Wellington Region:
    - The Wellington Region consistently demonstrated lower CO2 emissions per capita. In 2014, it ranked 1st out of 16 regions, with 6.56 tonnes per capita
    - In 2021, emissions reduced further to 5.8 tonnes per capita, but its ranking dropped marginally and ranked 2nd behind Auckland.

Dimension 7: An enabling built environment

Indicator summary for the Otago Region

Indicator 32A: Rent affordability	✓
Indicator 32B: Purchasing Affordability	✓
Indicator 33: Percentage of the population reporting that their dwelling is cold sometimes or most of the time	!

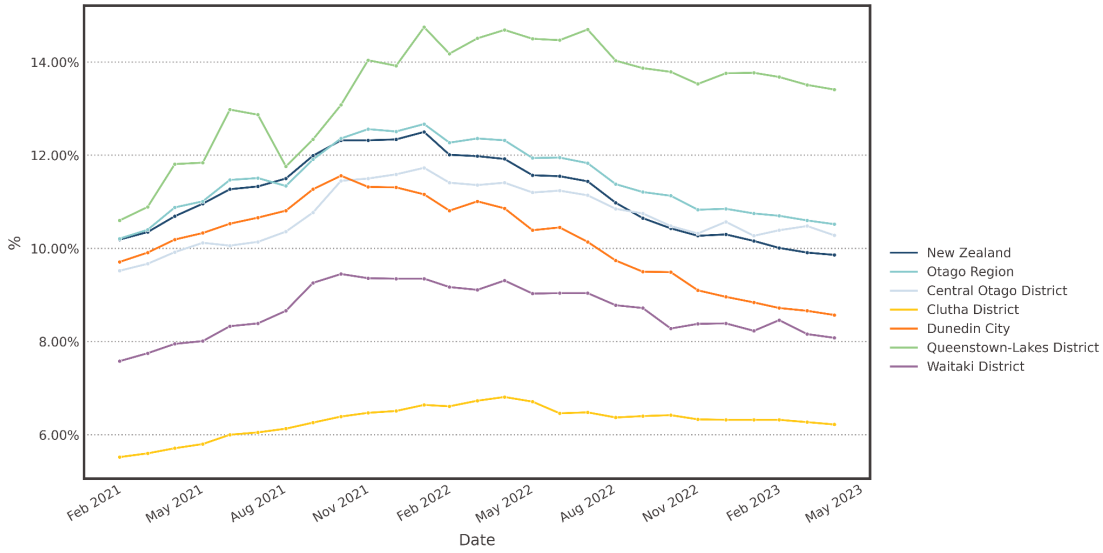
Indicator 32A: Rent Affordability



Indicator 32A focuses on Rent Affordability and depicts the percentage of household income spent on rent. Here we compare the years 2018 and 2023 to see how the regions fare over time. In 2018, the Otago region had a value of 28.09%, which is a very similar value percentage for New Zealand at the same time of 28.08%. However by 2023, the percentage of household income spent on rent in the Otago Region increased to 29.84%, while the New Zealand percentage increased to 29.15%. This increase over time demonstrates a small decrease in the affordability of rent in these areas.

Dunedin City over this time period saw declining rental affordability, going from 28.00% to 32.23% between 2018 and 2023. Whilst the Clutha and Queenstown-Lakes districts currently sit below the national average at around 24.33% and 24.41% respectively in 2023. In Queenstown this is due to high levels of household income, while in Clutha it largely reflects lower rental levels.

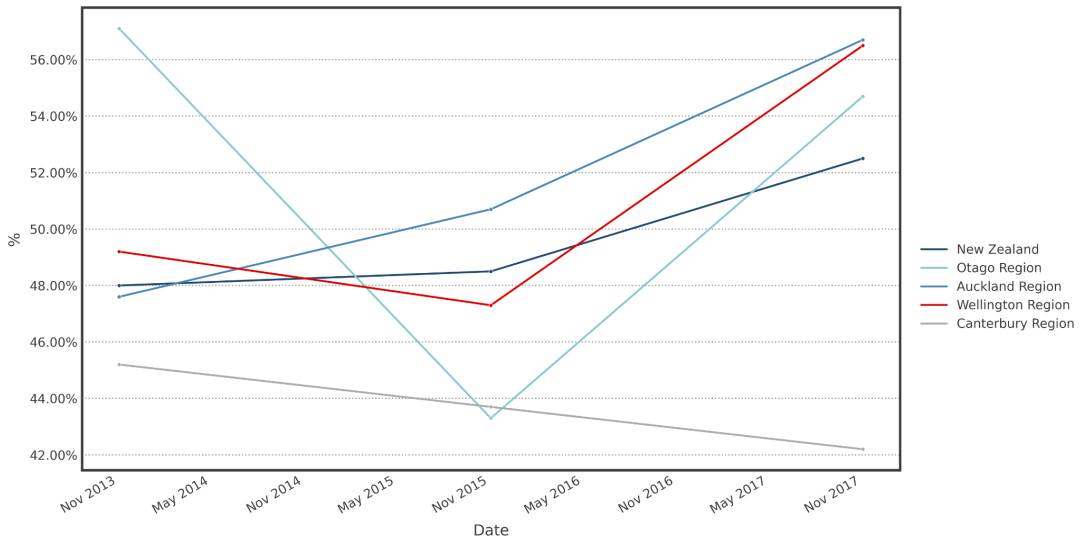
Indicator 32B: Purchasing affordability



The purchasing affordability Indicator data provides insights into the affordability of purchasing property in various regions of New Zealand. Here we have compared 2021 with 2023. Purchasing affordability is defined as the percentage of annual median household income that is spent on mortgage repayments (based on purchasing the median house price with a 20% deposit over 30 years with a 4% fixed interest rate).

New Zealand, as a whole, experienced a purchasing affordability rate of 10.19% of income in 2021, and by 2023, this had decreased to 9.86% due to softening house purchase prices. The Otago Region had a purchasing affordability rate of 10.21% in 2021, slightly higher than the national average, and by 2023, its purchasing affordability increased to 10.52%, still above the national average.

Indicator 33: Percentage of the population reporting that their dwelling is cold sometimes or most of the time



The percentage of the population reporting that their dwelling is cold sometimes or most of the time serves as a headline indicator of housing quality. This section analyses the data from 2014 and 2018 to assess the performance of different regions in New Zealand, with a specific focus on the Otago Region. The data highlights the importance of addressing housing conditions and provides insights into the changes in dwelling temperature perception over time.

1. New Zealand:

In 2014, the national average for New Zealand was 48.0% of the population reporting cold dwellings sometimes or most of the time. By 2018, this percentage had increased to 52.5%, indicating a rise in the prevalence of cold dwellings at the national level.

2. Otago Region:

In 2014, the Otago Region ranked 1st out of 12 regions, with 57.1% of the population reporting cold dwellings. By 2018, the Otago Region's ranking dropped to 7th, with a percentage of 54.7%. Despite a slight decrease, the Otago Region still had a higher proportion of the population reporting cold dwellings compared to the national average.

3. Auckland Region:

In 2014, the Auckland Region ranked 9th, with 47.6% of the population reporting cold dwellings. By 2018, the region's ranking improved to 4th, with a percentage of 56.7%. This indicates a significant increase in the proportion of individuals reporting cold dwellings in Auckland.

4. Canterbury Region:

The Canterbury Region had relatively low percentages in both 2014 and 2018. In 2014, it ranked 11th, with 45.2% reporting cold dwellings, and in 2018, it ranked last, with a reduced percentage of 42.2%.

5. Wellington Region:

The Wellington Region displayed consistent rankings over the analysed period. In 2014, it ranked 6th, with 49.2% reporting cold dwellings, and in 2018, it maintained its 6th position with a percentage of 56.5%.

6. Conclusion

The Otago Region demonstrates strong wellbeing in the dimensions of Healthy and Fulfilled people, Belonging and Identity, as well as Participation and Governance. The Otago Region not only surpasses the national benchmark in these areas but also showcases excellence in initiatives that deserve recognition. To maintain their accomplishments, the Otago Regional Council and supporting organisations within the Otago region should continue to prioritise and invest in these dimensions.

Within these dimensions, the indicators where Otago exceeds national performance are:

- Indicator 4 - Mean sense of life being worthwhile: Otago's leadership in this indicator signifies the Council's commitment to fostering a sense of wellbeing and contentment amongst its community. This indicator reflects Otago's dedication to providing opportunities for individuals to lead meaningful and fulfilling lives.
- Indicator 23 - Proportion of the population reporting it easy or very easy to express their identity: Otago's focus on creating an inclusive environment is evident in the proportion of the population reporting it easy to express their identity. This indicator highlights the region's efforts in promoting acceptance, diversity, and a strong sense of belonging. It is worth mentioning that whilst Otago is a leader in this indicator, there is still room to minimise this gap to improve community wellbeing.
- Indicator 28 - Mean generalised trust: Otago's success in this indicator emphasises the region's achievements in cultivating social capital and fostering trust amongst community members. This trust serves as a foundation for cooperation, collaboration, and a harmonious society.

By excelling in these dimensions and indicators, the Otago region sets itself apart as a region that prioritises the wellbeing of its community, fosters inclusivity and belonging, encourages active participation and democratic engagement, and builds strong social connections. Moving forward, Otago Regional Council and agencies within Otago should continue its endeavours in these areas to maintain its exceptional achievements and serve as an inspiration for other regions to follow suit.

7. Recommendations

The Otago Regional Council and organisations within the Otago region will need to work closely with agencies and its community to focus on four key dimensions of their efforts in the years to come to improve the overall wellbeing. These dimensions are:

Dimension 3 **Connected communities**	The Otago Region performs much lower than the national benchmark for Connected Communities. This should be a key focus area for the Otago Region to improve connection within communities.
Dimension 2 **A good standard of living**	Otago has a good standard of living relative to other regions and the national benchmark. However, it requires monitoring.
Dimension 6 **A healthy natural environment**	Otago's natural environment performs below the other main regions, but above the national average. New initiatives should be considered within this dimension.
Dimension 7 **An enabling built environment**	Otago's built environment performs below the national benchmark and initiatives should be considered to improve the current baseline, particularly in relation to housing.

Through targeted efforts in these key dimensions, the Otago Regional Council can make significant progress in enhancing the wellbeing of its communities. By prioritising connected communities, enabling built environments, good standards of living, and a healthy natural environment, the Council can foster social cohesion, improve livability, sustain economic prosperity, and protect the region's natural assets. Continuous monitoring, stakeholder engagement, and collaboration will be essential in successfully implementing initiatives that address specific challenges and leverage opportunities for the betterment of the Otago region.

When comparing the most recent ranking of how the Otago region compares to other regions in New Zealand per indicator, the analysis reveals areas of concern and potential focus for the Otago region to address to enhance the well-being and living conditions of its residents. The indicators in particular that stand out:

- Indicator 9: Regional real GDP per capita
- Indicator 24 & 25: Proportion of the population speaking Te Reo Māori and Proportion of Otago Māori population speaking Te Reo Māori.

Indicator 9 evaluates regional real GDP per capita and indicates the Otago region's performance lagging behind the national benchmark and other regions. Although there has been some growth in GDP per capita between 2014 and 2021, the region still does not meet the national benchmark and lags behind the other regions. To address this, the Otago Regional Council and supporting agencies could prioritise initiatives aimed at stimulating economic development, attracting investment, and fostering innovation and entrepreneurship. By creating a supportive environment for high-value industries and implementing targeted policies and incentives, the region can enhance its economic performance, generate higher-paying job opportunities, and improve the overall standard of living for its residents.

Indicator 24 and Indicator 25 both measure the proportion of the population and Otago Māori population speaking Te Reo Māori. Here the Otago Region again ranks last among the observed regions in the latest data. This highlights the importance of enhancing efforts to revitalise and promote the use of Te Reo Māori within the region, but at the same time it is important to note that Otago has the lowest Māori population of all New Zealand regions at 9%, compared with a national population of 17% (NZ Census, 2018).

Overall, the Otago Region's rankings in these three indicators highlight areas that require attention and improvement. By stimulating economic development and promoting the Te Reo Māori language revitalization, the Otago Regional Council and agencies can take significant strides towards enhancing the wellbeing and living conditions of its residents.

8. Appendix

a. Indicators by Dimension

The Otago Regional Council wellbeing framework outlines what dimensions of wellbeing need to be measured to monitor the wellbeing of the people of Otago. Indicators are statistics that are used to monitor social conditions providing information on progress towards a particular goal or outcome.

#	Dimension	Indicator	Rationale	Data Source
1	Healthy and Fulfilled People	Life expectancy	Headline indicator of health status	Stats NZ
2	Healthy and Fulfilled People	Victimisations per 10,000 people	Headline indicator of safety	New Zealand Police
3	Healthy and Fulfilled People	Mean life satisfaction score	Standard headline indicator of subjective wellbeing.	Stats NZ
4	Healthy and Fulfilled People	Mean sense of life being worthwhile	Complementary indicator of overall wellbeing.	Stats NZ
5	Healthy and Fulfilled People	Māori/non-Māori gap in life expectancy	Indicator of distribution of health outcomes	Stats NZ
6	Healthy and Fulfilled People	Gender gap in life expectancy	Indicator of distribution of health outcomes	Stats NZ
9	Good Standard of Living	Regional real GDP per capita	Headline indicator of access to employment	Stats NZ
10	Good Standard of Living	Real median hourly earnings	Supplementary indicator of access to employment	Stats NZ
11	Good Standard of Living	Employment rate	Supplementary measure of young people not developing or using human capital	Stats NZ
12	Good Standard of Living	Job Seeker Support rate	Headline measure of the flow of formal educational attainment	Ministry of Social Development
13	Good Standard of Living	Proportion of 15 to 24 year-olds Not in Education, Employment, or Training (NEET)	Headline measure of school readiness	Stats NZ
14	Good Standard of Living	School leavers with NCEA level 2 and above	Headline measure of flow of formal educational attainment	Education Counts
15	Good Standard of Living	School entrants with prior ECE	Headline indicator of distribution in incomes	Education Counts

16	Good Standard of Living	Percentage of school leavers enrolled in tertiary education	Supplementary indicator of distribution in incomes	Education Counts
17	Good Standard of Living	Median hourly earnings as a percentage of mean hourly earnings	Female median hourly earnings as a percentage of male median hourly earnings	Stats NZ
18	Good Standard of Living	Māori median hourly earnings as a percentage of non-Māori median hourly earnings	Indicator of the distribution of knowledge outcomes	Stats NZ
19	Good Standard of Living	Female median hourly earnings as a percentage of male median hourly earnings	Indicator of the distribution of knowledge outcomes	Stats NZ
20	Good Standard of Living	Ratio of the proportion of males leaving with NCEA level 2 as their highest qualification, compared to the proportion of females	A potential headline measure of connectedness	Education Counts
21	Good Standard of Living	Ratio of the proportion of Māori leaving with NCEA level 2 as their highest qualification, compared to the proportion of the total population	Best available indicator for individual and shared identity	Education Counts
22	Connected Communities	Proportion of the population who reported feeling lonely some/most/all of the time	Indicator of shared identity and belonging	Stats NZ
23	Belonging and Identity	Proportion of the population reporting it easy or very easy to express their identity	Indicator of Māori identity and of the intergenerational sustainability of Te Reo Māori	Stats NZ
24	Belonging and Identity	Proportion of the population speaking Te Reo	Headline indicator of confidence in democratic institutions	Stats NZ
25	Belonging and Identity	Proportion of the Māori population speaking Te Reo	Headline indicator of trust in service delivery institutions	Stats NZ

26	Participation and Governance	Voter turnout rate in at General Election	Indicator of the level of social capital in the community	Electoral Commission
27	Participation and Governance	Mean trust in health, education, and policy institutions	Headline measure of air quality used in MfE/Statistics New Zealand environmental reporting	Stats NZ
28	Participation and Governance	Mean generalised trust	Potential headline measure of air quality used in MfE/Statistics New Zealand environmental reporting	Stats NZ
29	A Healthy Natural Environment	Mean PM10 concentration in micrograms per cubic metre	Headline measure of atmospheric outcomes relating to climate change and an indicator of the sustainability of outcomes	LAWA
30	A Healthy Natural Environment	Percentage of measured swimming sites that are safe	Headline indicator of housing affording	LAWA
31	A Healthy Natural Environment	Tonnes of carbon dioxide equivalents per capita	Headline indicator of housing quality	Stats NZ
32	An Enabling Built Environment	Rent and purchasing affordability	Headline indicator of housing affording	Homes.co.nz and Stats NZ
33	An Enabling Built Environment	Percentage of the population reporting that their dwelling is cold sometimes or most of the time	Headline indicator of housing quality	Stats NZ

b. Alterations to proposed indicators

The selection of indicators by DOT often involves considering various factors, such as data availability and suitability of different data sources. In some cases, constraints on data collection or limitations in data quality may require DOT to carefully choose alternative indicators to monitor the desired outcomes effectively. This process ensures that despite data constraints, DOT can still gather relevant and meaningful information to assess transportation conditions and make informed decisions. DOT made alterations to the following indicators:

#	Originally Proposed Indicator	Actual Indicator	Change and rationale
2	Victimisations per 100,000 people (violent and burglaries)	Victimisations per 10,000 people	As a headline indicator of safety, DOT felt this indicator would better reflect community impact. Victimisations include: abduction; assault; motor vehicle theft; robbery, extortion and related offenses; sexual assault, theft and illegal use of property; unlawful entry, burglary, breaking and entering.
4	Mean sense of purpose in life	Mean sense of life being worthwhile	The Wellbeing 2018 statistics did not include a 'purpose in life' question, so 'life worthwhile' was used.
7	Māori/non-Māori gap in mean life satisfaction	-	This indicator could not be constructed as the data was not available below a national level.
8	Gender gap in mean life satisfaction	-	This indicator could not be constructed as the data was not available below a national level.
12	Unemployment rate	Job Seeker Support rate	DOT used this as an alternative indicator as the unemployment rate reflects no more than the opposite of the employment rate already reported on . The Jobseeker rate reflects those actively seeking work.

16	Students in tertiary education as a proportion of the population	Percentage of school leavers enrolled in tertiary education	DOT used this as an alternative headline measure of flow of formal educational attainment.
20	Male NCEA level 2 attainment rate as a percentage of female	Ratio of the proportion of males leaving with NCEA level 2 as their highest qualification, compared to the proportion of females	DOT used this as an alternative indicator of the distribution of knowledge outcomes.
21	Māori NCEA level 2 attainment rate as a percentage of non-Māori	Ratio of the proportion of Māori leaving with NCEA level 2 as their highest qualification, compared to the proportion of the total population	DOT used this as an alternative indicator of the distribution of knowledge outcomes.
26	Voter turnout rate in last local body elections	Voter turnout rate in at General Election	DOT used this as an alternative headline indicator of confidence in democratic institutions.
29	River water quality: macroinvertebrate community index	Mean PM10 concentration in micrograms per cubic metre (air quality measure)	ORC deliberately measures this data at sites with known air quality issues. This makes aggregation to a district level of limited use
30	River water quality: macroinvertebrate community index	Percentage of measured swimming sites that are safe	DOT used this as an alternative indicator.
31	C02 emissions per capita	Tonnes of carbon dioxide equivalents per capita	DOT defined the unit of measurement as tonnes per capita.
32	Percentage of households spending more than 30% of income on housing	32A: Rent Affordability 32B: Purchasing Affordability	DOT used these as an alternative indicator headline indicator of housing affording.

c. Indicator tables

Indicator 1: Life expectancy

Area	Ranking 2014	Value (Units) 2014	Ranking 2019	Value (Units) 2019
New Zealand	N/A	81.35 Years	N/A	81.75 Years
Otago Region	7/16	81.15 Years	4/16	82.35 Years
Central Otago District	8/67	82.4 Years	5/67	83.75 Years
Clutha District	34/67	81.05 Years	20/67	82.0 Years
Dunedin City	41/67	80.65 Years	26/67	81.7 Years
Queenstown-Lakes District	1/67	84.85 Years	1/67	86.05 Years
Waitaki District	46/67	80.4 Years	34/67	81.45 Years

Indicator 2: Victimisations per 10,000 people

Area	Ranking 2018	Value (Units) 2018	Ranking 2023-	Value (Units) 2023
New Zealand	N/A	34.59 Rate	N/A	50.27 Rate
Otago Region	15/17	18.44 Rate	15/17	23.3 Rate
Central Otago District	64/67	14.53 Rate	66/67	10.03 Rate

Clutha District	53/67	19.43 Rate	62/67	17.14 Rate
Dunedin City	58/67	17.71 Rate	48/67	26.26 Rate
Queenstown-Lakes District	52/67	19.57 Rate	52/67	23.76 Rate
Waitaki District	39/67	24.91 Rate	56/67	21.14 Rate

Indicator 3: Mean life satisfaction score

Area	Ranking 2014	Mean life satisfaction (Index Unit) in 2014	Ranking 2018	Mean life satisfaction (Index Unit) in 2018
New Zealand	N/A	7.8 Index Unit	N/A	7.7 Index Unit
Otago Region	11/11	7.7 Index Unit	3/13	7.8 Index Unit
Auckland Region	3/11	7.8 Index Unit	13/13	7.6 Index Unit
Canterbury Region	11/11	7.7 Index Unit	6/13	7.7 Index Unit
Wellington Region	3/11	7.8 Index Unit	6/13	7.7 Index Unit

Indicator 4: Mean sense that life is worthwhile

Area	Ranking 2014	Mean sense of life being worthwhile (Index Unit) in 2014	Ranking 2018	Mean sense of life being worthwhile (Index Unit) in 2018
New Zealand	N/A	8.1 Index Unit	N/A	8.1 Index Unit
Otago Region	8/13	8.1 Index Unit	1/9	8.2 Index Unit
Auckland Region	13/13	8.0 Index Unit	9/9	8.0 Index Unit
Canterbury	8/13	8.1 Index Unit	7/9	8.1 Index Unit

Region				
Wellington Region	6/13	8.2 Index Unit	9/9	8.0 Index Unit

Indicator 5: Māori/non-Māori gap in life expectancy

Area	Ranking 2014-01-01	Value (Units) 2014-01-01	Ranking 2019-01-01	Value (Units) 2019-01-01
New Zealand	N/A	7.05 Years	N/A	7.3 Years
Otago Region	16/16	1.1 Years	15/15	1.5 Years
Auckland Region	7/16	7.1 Years	5/15	7.65 Years
Canterbury Region	12/16	2.7 Years	12/15	3.15 Years
Wellington Region	9/16	5.45 Years	9/15	5.15 Years

Indicator 6: Gender gap in life expectancy

Area	Ranking 2014	Gender gap in life expectancy (Years) 2014	Ranking 2019	Gender gap in life expectancy (Years) 2019
New Zealand	N/A	3.7 Years	N/A	3.5 Years
Otago Region	5/15	3.7 Years	3/15	3.4 Years
Central Otago District	7/67	3.5 Years	2/66	2.9 Years
Clutha District	35/67	3.9 Years	50/66	3.8 Years
Dunedin City	25/67	3.8 Years	50/66	3.8 Years
Queenstown-Lakes	35/67	3.9 Years	3/66	3.0 Years

District				
Waitaki District	12/67	3.6 Years	19/66	3.5 Years

Indicator 9: Regional real GDP per capita

Area	Ranking 2014	GDP Per Capita ($) 2014	Ranking 2021	GDP Per Capita ($) 2021
New Zealand	N/A	47409.19 NZD	N/A	59049.79 NZD
Otago Region	9/13	43224.05 NZD	10/13	51921.83 NZD
Auckland Region	4/13	49741.17 NZD	2/13	66539.22 NZD
Canterbury Region	5/13	49351.45 NZD	6/13	56844.28 NZD
Wellington Region	2/13	57585.21 NZD	1/13	69065.68 NZD

Indicator 10: Real median hourly earnings

Area	Ranking 2014	Real median hourly earnings ($) 2014	Ranking 2022	Real median hourly earnings ($) 2022
New Zealand	N/A	21.92 NZD	N/A	29.0 NZD
Otago Region	4/12	21.58 NZD	4/13	28.77 NZD
Auckland Region	2/12	23.25 NZD	2/13	30.3 NZD
Canterbury Region	3/12	21.63 NZD	6/13	28.28 NZD
Wellington Region	1/12	24.04 NZD	1/13	32.0 NZD

Indicator 11: Employment rate

Area	Ranking 2013	Employment rate 2013	Ranking 2018	Employment rate 2018
New Zealand	N/A	92.89 %	N/A	94.18 %
Otago Region	8/17	94.3 %	8/17	95.17 %
Central Otago District	5/67	97.42 %	4/67	97.86 %
Clutha District	10/67	96.51 %	16/67	96.11 %
Dunedin City	46/67	92.47 %	51/67	93.28 %
Queenstown-Lakes District	3/67	97.51 %	2/67	98.65 %
Waitaki District	14/67	96.11 %	14/67	96.26 %

Indicator 12: Job seeker support rate

Area	Ranking 2013	Job Seeker Support rate 2013	Ranking 2018	Job Seeker Support rate 2018
New Zealand	N/A	6.04 %	N/A	5.44 %
Otago Region	1/16	4.01 %	1/16	3.31 %
Central Otago District	2/66	1.69 %	2/66	1.22 %
Clutha District	9/66	3.62 %	10/66	3.51 %
Dunedin City	26/66	5.37 %	23/66	4.5 %
Queenstown-Lakes District	1/66	1.34 %	1/66	0.74 %
Waitaki District	20/66	4.64 %	20/66	3.94 %

Indicator 13: Proportion of 15 to 24 year-olds Not in Education, Employment, or Training (NEET)

Area	Ranking 2014	% of 15 to 24 year-olds NEET 2014	Ranking 2022	% of 15 to 24 year-olds NEET 2022
New Zealand	N/A	13.2 %	N/A	11.4 %
Otago Region	1/12	7.4 %	8/13	10.9 %
Auckland Region	5/12	12.4 %	7/13	10.8 %
Canterbury Region	2/12	9.2 %	4/13	9.6 %
Wellington Region	6/12	12.9 %	3/13	8.2 %

Indicator 14: School leavers with NCEA level 2 and above

Area	Ranking 2014	% of School Leavers with NCEA Level 2 or above 2014	Ranking 2021	% of School Leavers with NCEA Level 2 or above 2021
New Zealand	N/A	79.82 %	N/A	80.01 %
Otago Region	3/16	83.91 %	3/16	84.35 %
Central Otago District	23/66	81.82 %	10/66	83.54 %
Clutha District	5/66	88.77 %	47/66	75.77 %
Dunedin City	15/66	83.16 %	8/66	84.13 %
Queenstown-Lakes District	3/66	90.32 %	4/66	90.14 %
Waitaki District	43/66	76.36 %	22/66	81.09 %

Indicator 15: School entrants with prior ECE

Area	Ranking 2014	% of School entrants with prior ECE 2014	Ranking 2021	% of School entrants with prior ECE 2021
New Zealand	N/A	64.75 %	N/A	63.73 %
Otago Region	3/17	72.78 %	3/17	70.02 %
Central Otago District	16/67	72.03 %	13/67	68.88 %
Clutha District	47/67	58.06 %	61/67	48.23 %
Dunedin City	8/67	78.43 %	6/67	74.09 %
Queenstown-Lakes District	21/67	69.92 %	9/67	70.89 %
Waitaki District	53/67	55.36 %	30/67	63.01 %

Indicator 17: Median hourly earnings as a percentage of mean hourly earnings

Area	Ranking 2014	Median hourly earnings as a percentage of mean hourly earnings 2014	Ranking 2022	Median hourly earnings as a percentage of mean hourly earnings 2022
New Zealand	N/A	78.85 %	N/A	79.91 %
Otago Region	10/13	77.65 %	12/12	75.65 %
Auckland Region	8/13	78.57 %	6/12	81.1 %
Canterbury Region	3/13	82.03 %	11/12	79.57 %
Wellington Region	9/13	77.9 %	10/12	79.84 %

Indicator 18: Māori median hourly earnings as a percentage of non-Māori median hourly earnings

Area	Ranking 2014	Māori median hourly earnings as a percentage of non-Māori median hourly earnings 2014	Ranking 2022	Māori median hourly earnings as a percentage of non-Māori median hourly earnings 2022
New Zealand	N/A	91.24 %	N/A	91.38 %
Otago Region	13/13	82.95 %	6/13	94.3 %
Auckland Region	2/13	94.8 %	12/13	89.11 %
Canterbury Region	11/13	88.86 %	4/13	95.47 %
Wellington Region	12/13	87.35 %	13/13	87.5 %

Indicator 19: Female median hourly earnings as a percentage of male median hourly earnings

Area	Ranking 2014	Female median hourly earnings as a percentage of male median hourly earnings 2014	Ranking 2022	Female median hourly earnings as a percentage of male median hourly earnings 2022
New Zealand	N/A	90.57 %	N/A	92.93 %
Otago Region	8/13	88.3 %	8/13	93.13 %
Auckland Region	1/13	94.83 %	6/13	93.42 %
Canterbury Region	13/13	82.73 %	10/13	88.99 %
Wellington Region	2/13	93.76 %	7/13	93.4 %

Indicator 20: Ratio of the proportion of males leaving with NCEA level 2 as their highest qualification, compared to the proportion of females

Area	Ranking 2014	Ratio of males leaving with NCEA Level 2 compared to females 2014	Ranking 2021	Ratio of males leaving with NCEA Level 2 compared to females 2021
New Zealand	N/A	1.36 Ratio	N/A	1.36 Ratio
Otago Region	14/16	1.59 Ratio	13/16	1.6 Ratio
Central Otago District	43/65	1.54 Ratio	17/66	1.25 Ratio
Clutha District	42/65	1.53 Ratio	61/66	2.08 Ratio
Dunedin City	45/65	1.58 Ratio	39/66	1.52 Ratio
Queenstown-Lakes District	56/65	1.7 Ratio	51/66	1.74 Ratio
Waitaki District	47/65	1.6 Ratio	56/66	1.83 Ratio

Indicator 21: Ratio of the proportion of Maori leaving with NCEA level 2 as their highest qualification, compared to the proportion of the total populationMāori

Area	Ranking 2014	Ratio of Māori NCEA level 2 attainment rate compared to non-Māori 2014	Ranking 2021	Ratio of Māori NCEA level 2 attainment rate compared to non-Māori 2021
New Zealand	N/A	1.16 Ratio	N/A	1.14 Ratio
Otago Region	11/16	1.22 Ratio	4/16	1.0 Ratio
Central Otago District	11/66	0.79 Ratio	5/66	0.66 Ratio
Clutha District	24/66	0.95 Ratio	33/66	1.03 Ratio
Dunedin City	58/66	1.3 Ratio	60/66	1.21 Ratio
Queenstown-Lakes	64/66	1.53 Ratio	2/66	0.55 Ratio

District				
Waitaki District	15/66	0.87 Ratio	27/66	1.01 Ratio

Indicator 22: Proportion of the population who reported feeling lonely some/most/all of the time

Area	Ranking 2014	% of the reported lonely population 2014	Ranking 2018	% of the reported lonely population 2018
New Zealand	N/A	36.1 %	N/A	39.0 %
Otago Region	12/12	38.7 %	4/13	39.5 %
Auckland Region	3/12	35.2 %	1/13	35.5 %
Canterbury Region	7/12	36.8 %	4/13	39.5 %
Wellington Region	5/12	36.5 %	12/13	43.8 %

Indicator 23: Proportion of the population reporting it easy or very easy to express their identity

Area	Ranking 2014	% of population reporting it easy or very easy to express their identity 2014	Ranking 2018	% of population reporting it easy or very easy to express their identity 2018
New Zealand	N/A	86.3 %	N/A	83.8 %
Otago Region	5/13	87.2 %	2/13	90.5 %
Auckland Region	9/13	85.3 %	10/13	82.0 %
Canterbury Region	4/13	87.4 %	5/13	85.1 %
Wellington Region	7/13	87.1 %	6/13	84.7 %

Indicator 24: Proportion of the population speaking Te Reo Māori

Area	Ranking 2013	% of the population speaking Te Reo Māori 2013	Ranking 2018	% of the population speaking Te Reo Māori 2018
New Zealand	N/A	3.73 %	N/A	3.96 %
Otago Region	16/17	1.57 %	17/17	1.76 %
Central Otago District	61/67	1.42 %	62/67	1.36 %
Clutha District	54/67	1.77 %	44/67	2.45 %
Dunedin City	53/67	1.81 %	53/67	2.04 %
Queenstown-Lakes District	67/67	0.89 %	66/67	1.02 %
Waitaki District	66/67	1.04 %	65/67	1.24 %

Indicator 25: Proportion of Otago Māori population speaking Te Reo Māori

Area	Ranking 2013	% of Māori population speaking Te Reo Māori 2013	Ranking 2018	% of Māori population speaking Te Reo Māori 2018
New Zealand	N/A	3.08 %	N/A	3.41 %
Otago Region	15/16	0.98 %	16/16	1.12 %
Central Otago District	58/67	0.91 %	62/67	0.86 %
Clutha District	52/67	1.25 %	48/67	1.78 %
Dunedin City	54/67	1.13 %	53/67	1.29 %
Queenstown-Lakes District	67/67	0.49 %	66/67	0.59 %
Waitaki District	66/67	0.6 %	65/67	0.77 %

Indicator 26: Voter turnout rate in general elections

Area	Ranking 2017	% of Voter turnout in general elections 2017	Ranking 2020	% of Voter turnout in general elections 2020
New Zealand	N/A	79.01 %	N/A	81.54 %
Otago Region	3/17	82.21 %	2/17	85.45 %
Central Otago District	18/67	82.39 %	7/67	87.37 %
Clutha District	19/67	82.27 %	21/67	84.81 %
Dunedin City	14/67	82.79 %	14/67	85.46 %
Queenstown-Lakes District	43/67	78.77 %	22/67	84.73 %
Waitaki District	10/67	83.12 %	15/67	85.34 %

Indicator 27: Mean trust in health, education, and policy institutions

Area	Ranking 2014	Mean trust in health, education, and policy institutions 2014	Ranking 2018	Mean trust in health, education, and policy institutions 2018
New Zealand	N/A	38.6 Index Unit	N/A	39.3 Index Unit
Otago Region	4/13	38.4 Index Unit	3/13	39.6 Index Unit
Auckland Region	1/13	39.7 Index Unit	2/13	40.1 Index Unit
Canterbury Region	2/13	39.0 Index Unit	4/13	39.4 Index Unit
Wellington Region	3/13	39.0 Index Unit	1/13	40.4 Index Unit

Indicator 28: Mean generalised trust

Area	Ranking 2014	Mean generalised trust 2014	Ranking 2018	Mean generalised trust 2018
New Zealand	N/A	6.9 Index Unit	N/A	6.8 Index Unit
Otago Region	2/12	7.0 Index Unit	1/11	7.0 Index Unit
Auckland Region	5/12	6.9 Index Unit	4/11	6.9 Index Unit
Canterbury Region	2/12	7.0 Index Unit	1/11	7.0 Index Unit
Wellington Region	1/12	7.1 Index Unit	1/11	7.0 Index Unit

Indicator 30: Percentage of safe swimming sites

Area	Ranking 2018	% of safe swimming sites in 2018	Ranking 2022	% of safe swimming sites in 2022
New Zealand	N/A	32.95 %	N/A	33.18 %
Otago Region	12/15	19.38 %	8/15	24.92 %
Central Otago District	43/43	0.0 %	41/45	11.82 %
Clutha District	1/43	100.0 %	1/45	100.0 %
Dunedin City	27/43	28.57 %	37/45	16.07 %
Queenstown-Lakes District	31/43	18.18 %	1/45	100.0 %
Waitaki District	22/43	37.58 %	10/45	75.15 %

Indicator 31: C02 emissions per capita

Area	Ranking 2014	C02 emissions (Tonnes) per capita in 2014	Ranking 2021	C02 emissions (Tonnes) per capita in 2021
New Zealand	N/A	18.0 Tonnes	N/A	15.57 Tonnes
Otago Region	9/16	24.04 Tonnes	10/16	21.02 Tonnes
Auckland Region	2/16	7.03 Tonnes	1/16	5.71 Tonnes
Canterbury Region	8/16	20.15 Tonnes	8/16	18.53 Tonnes
Wellington Region	1/16	6.56 Tonnes	2/16	5.8 Tonnes

Indicator 32A: Rent Affordability

Area	Ranking 2018	Value (Units) 2018	Ranking 2023	Value (Units) 2023
Area	**Ranking 2018**	**Value (Units) 2018**	**Ranking 2023**	**Value (Units) 2023**
New Zealand	N/A	28.08%	N/A	29.15%
Otago Region	7/16	28.09%	8/16	29.84%
Central Otago District	15/66	27.91%	33/66	28.67%
Clutha District	62/66	20.28%	55/66	24.33%
Dunedin City	14/66	28.00%	16/66	32.23%
Queenstown-Lakes District	20/66	27.09%	54/66	24.41%
Waitaki District	37/66	24.96%	34/66	28.51%

Indicator 32B: Purchasing Affordability

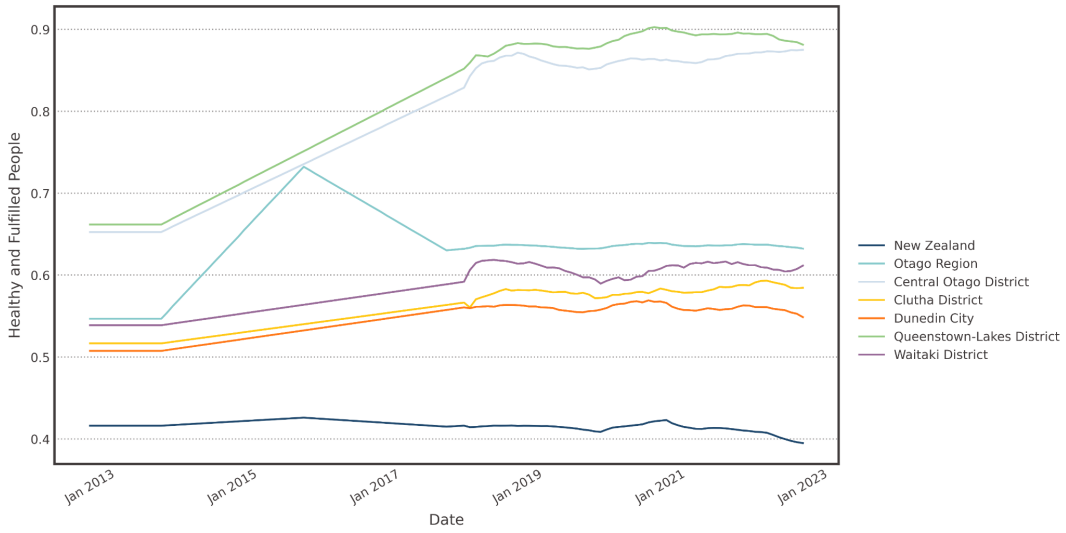
Area	Ranking 2021	Value (Units) 2021	Ranking 2023	Value (Units) 2023
New Zealand	N/A	10.19%	N/A	9.86%
Otago Region	8/16	10.21%	7/16	10.52%
Central Otago District	25/66	9.52%	22/66	10.28%
Clutha District	62/66	5.52%	66/66	6.22%
Dunedin City	20/66	9.71%	40/66	8.57%
Queenstown-Lakes District	12/66	10.60%	4/66	13.41%
Waitaki District	45/66	7.58%	47/66	8.08%

Indicator 33: Percentage of the population reporting that their dwelling is cold sometimes or most of the time

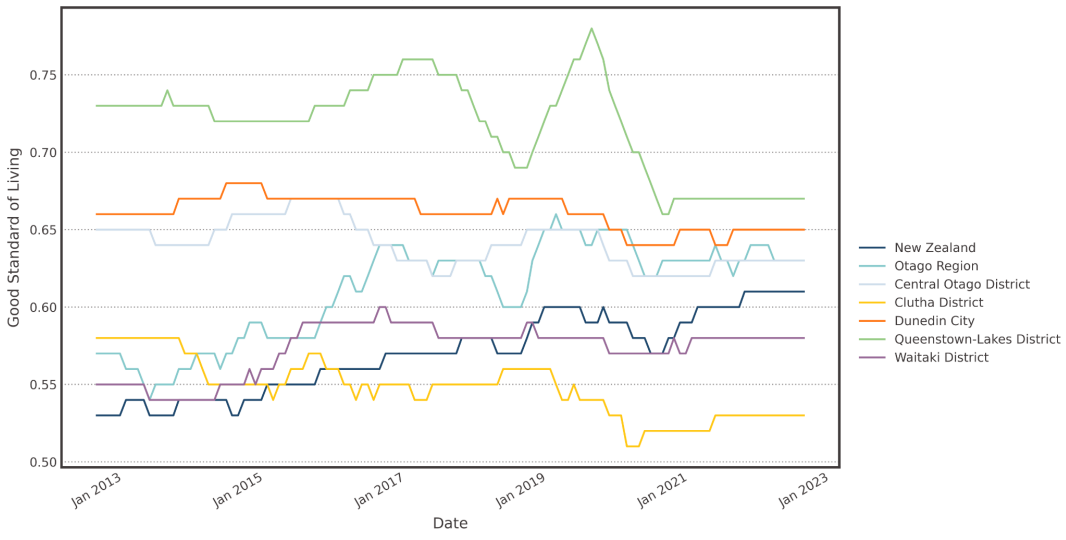
Area	Ranking 2014	% of the population reporting cold dwelling in 2014	Ranking 2018	% of the population reporting cold dwelling in 2018
New Zealand	N/A	48.0 %	N/A	52.5 %
Otago Region	1/13	57.1 %	7/13	54.7 %
Auckland Region	9/13	47.6 %	4/13	56.7 %
Canterbury Region	11/13	45.2 %	13/13	42.2 %
Wellington Region	6/13	49.2 %	5/13	56.5 %

d. Dimension scores by Territorial Authorities

Dimension 1: Healthy and Fulfilled People

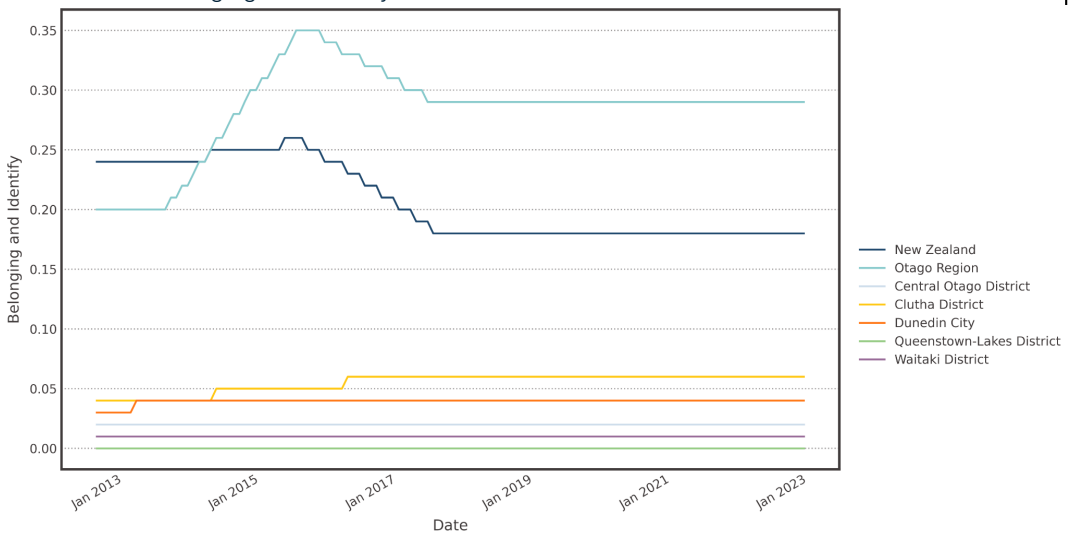


Dimension 2: A good standard of living

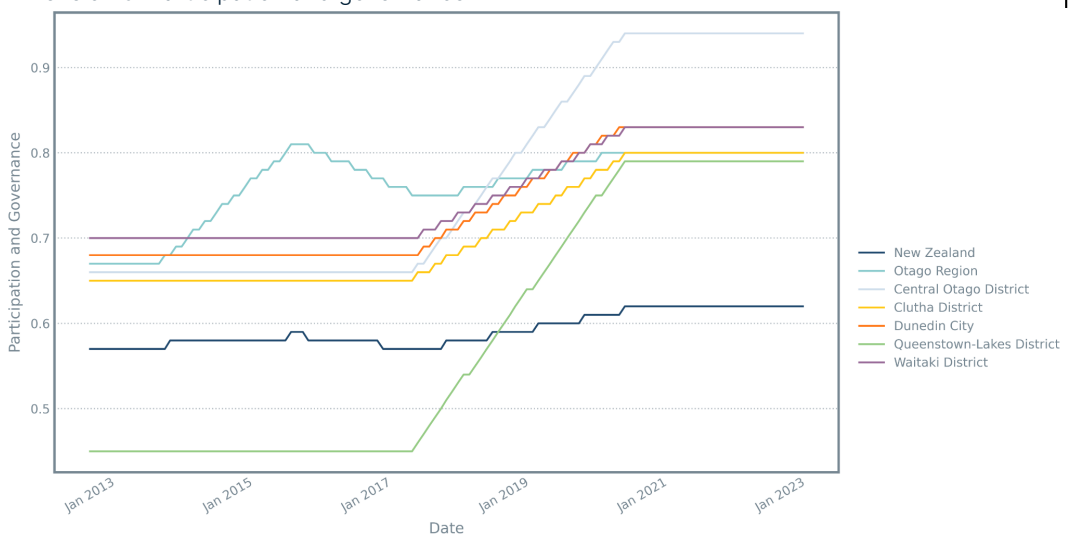


Dimension 3: Connected communities - *No data at the TA level*

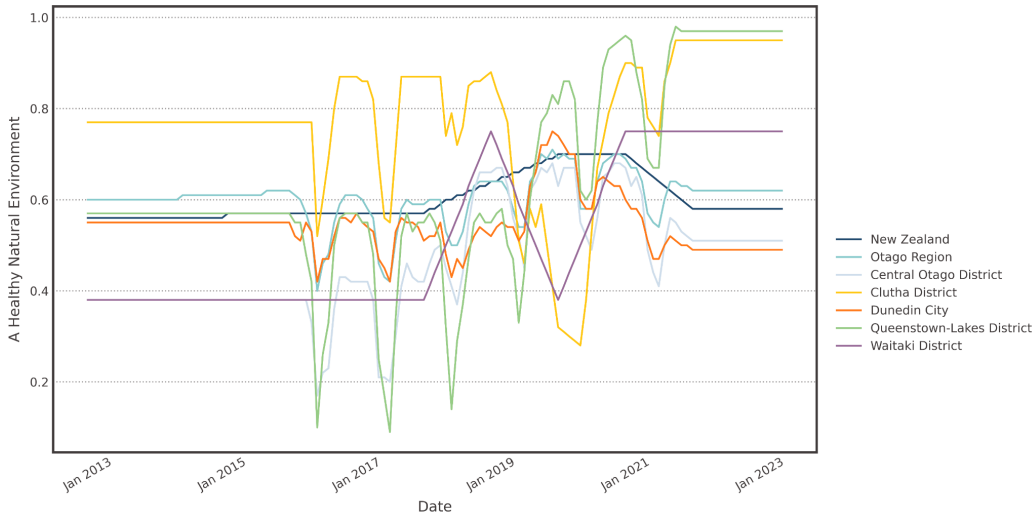
Dimension 4: Belonging and identity



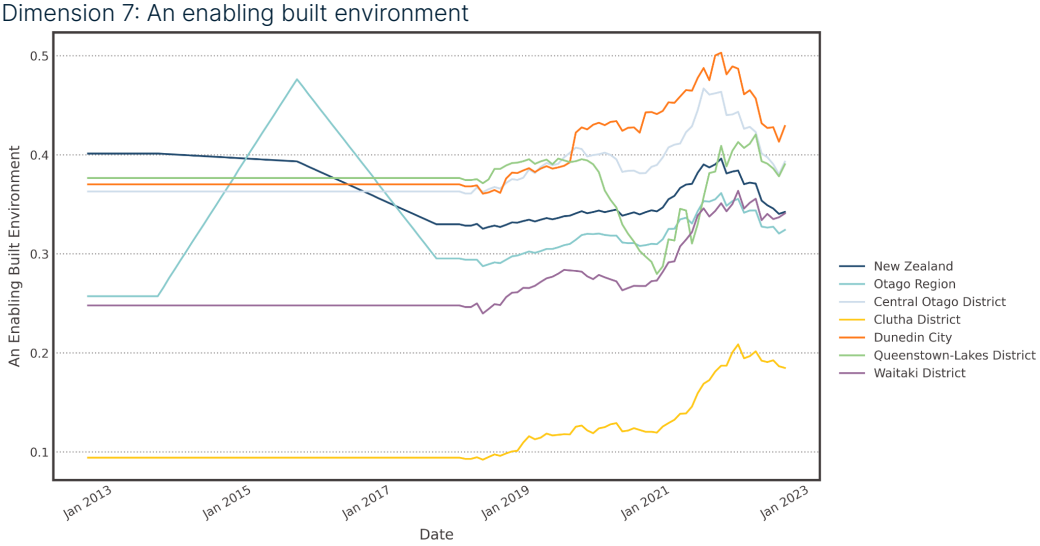
Dimension 5: Participation and governance



Dimension 6: A healthy natural environment



Dimension 7: An enabling built environment



e. Methodology

DOT embarked on a comprehensive process to gather and analyse data for the 33 selected indicators. Initially, data was sourced from a wide range of sources for each indicator. Once collected, the data underwent a thorough cleaning and preprocessing phase to ensure accuracy and consistency. Additionally, efforts were made to align the time scales of the data whenever possible, allowing for meaningful comparisons across different periods.

The availability of data varied across national, regional, and territorial authority levels. While some data covered all levels, certain indicators were only available at specific geographic levels. To address this discrepancy and calculate indicators at subsequent levels, where appropriate, DOT employed a weighted average approach. By utilising the populations of territorial authorities and regions, weighted average indicators were computed, providing a comprehensive view of the wellbeing across New Zealand.

Once the indicators were prepared, DOT organised the data by date and area, categorising them based on territorial authority or region. Subsequently, the data was ranked in either ascending or descending order within these groupings, depending on the meaning of the values. For example, higher the percentage of safe swimming sites, the better, and hence 100% is assigned rank 1. On the other hand, the higher job seeker support rate means the worse outcome, and hence the ranking is reversed.

When groups shared the same value, the ‘minimum ranking’ approach was applied to all of those values - for example, if two groups had the highest value, they would both be assigned the rank of 1. These rankings, along with the defined dimensions and domains, were then utilised to generate aggregated scores.

In addition to the aforementioned steps, it is important to note that due to the diverse sources from which data was collected, the actual total number of territorial authorities and regions included in the analysis may differ from the expected figures of 67 territorial authorities and 16 regions. The availability and inclusion of data from different sources might result in variations in the count of territorial authorities and regions considered in the analysis. The equation for weighted averaging is:

*Weighted Average = (Sum of (Value * Population)) / Total Population*

In this equation, "Value" represents the individual values or scores that need to be averaged, "Population" represents the corresponding populations associated with each value, and "Total Population" represents the sum of all populations.

Scoring Methodology

The scoring methodology used in this report combines the indicators within each dimension to calculate overall dimension scores. To ensure comparability across regions and time, the indicators are first normalised. Here a value of 1 represents the best wellbeing result achieved by any region or territorial authority (TA) since 2013, while a value of 0 represents the worst result in that time period.

The dimension score is then derived by averaging the individual indicator scores. A score of 1 indicates that all the indicators within the dimension have achieved the level of the best wellbeing observed in any area since 2013. For instance, a score of 0.6 means that the dimension is 60% towards reaching the best possible result.

This scoring methodology enables a relative assessment of each dimension's wellbeing performance, allowing for comparisons and understanding of progress over time. It provides a standardised approach to quantifying and summarising the overall wellbeing within each dimension, contributing to a comprehensive understanding of the wellbeing landscape in the Otago region.

Step 1: normalise the indicators

The Dimension score gathers many indicators, expressed on very different units (dollars, years, etc). To compare and aggregate values expressed in different units, the values have to be normalised.

This normalisation is done according to a standard formula which converts the original values of the indicators into numbers varying in a range between 0 (for the worst possible outcome) and 1 (for the best possible outcome). The formula is:

$$\frac{value\ to\ convert - minimum\ value}{maximum\ value - minimum\ value}$$

When an indicator measures a negative component of well-being (e.g. unemployment) the formula used is:

$$1 - \frac{value\ to\ convert - minimum\ value}{maximum\ value - minimum\ value}$$

For normalisation, data was limited from 1/1/2013. Data was interpolated to each month linearly within the range of actual values (for example, life satisfaction data was measured at Jan 2014, 2016 and 2018. Monthly values were interpolated between these actual data points). Data was held constant outside of this range (life satisfaction for 2013 was set to be the Jan 2014 value).

Step 2: Aggregate the indicators into scores

Each dimension of well-being is measured by one to four indicators. After normalisation, indicators are averaged with equal weights. For instance Belonging and Identify is measured through expressing identity, speaking Te Reo and Māori speaking Te Reo. The Belonging and Identity will thus be given by:

$$\frac{(\textit{reporting it easy or very easy to express their identity}) + (\textit{Otago population speaking Te Reo}) + (\textit{Māori population speaking Te Reo})}{3}$$

8.7. Electoral System for 2025 and 2028 Local Body Elections

Prepared for:	Council
Report No.	GOV2321
Activity:	Community - Governance and Democracy
Author:	Amanda Vercoe, General Manager Governance, Culture and Customer
Endorsed by:	Richard Saunders, Chief Executive
Date:	23 June 2023

PURPOSE

[1] To consider electoral systems for the 2025 (and possibly 2028) local body elections.

EXECUTIVE SUMMARY

[2] Under the Local Electoral Act 2001, a decision is required by 12 September 2023 should the Council wish to change its voting system for the 2025 and 2028 local body elections. The Council currently uses First Past the Post (FPP), the alternative is Single Transferable Vote (STV).

[3] The Council does not have to make a decision however, as the current system will continue to apply unless changed as a result of a poll of electors or a further resolution[1].

[4] Regardless, the Council must give public notice by 19 September 2023 of the right to demand a poll on the electoral system used at triennial elections. The notice must include any resolution of the Council on the system to be used.

[5] The Council can also decide by 21 February 2024 to hold a poll on the voting system.

RECOMMENDATION

That the Council:

1) ***Receives*** *this report.*

2) ***Agrees*** *to:*

a. retain FPP for the 2025 election; or

b. change electoral system to Single Transferable Vote for the 2025 and 2028 local body elections; or

c. not make a decision, in which case the current system of First Past the Post would continue to apply; or

d. signal an intention to hold a poll, and revisit this prior to 21 February 2024; or

[1] section 27(2)(b)(i) of the Local Electoral Act 2001

e. bring the paper back to the August 2023 Council meeting, and in the meantime undertake engagement with local territorial authorities and other key stakeholders on the options and organise a workshop for councillors on electoral systems.

*3) **Notes** a public notice will be made prior to 19 September 2023 advising of the right of electors to demand a poll on the electoral system for the 2025 and 2028 elections.*

*4) **Notes** that should a decision be made to change electoral systems to Single Transferable Vote, options for a public education campaign will be brought back to Council for consideration as part of Long-term Plan considerations.*

BACKGROUND

[6] The Local Electoral Act 2001 is the legislation under which local elections and polls are held. This legislation sets out the voting systems that may be used, and the processes under which a local authority may change its systems.

[7] The Otago Regional Council last considered the issue of voting systems in 2020. At that time the Council resolved to retain FPP for the 2022 election, but hold a public poll alongside the 2022 election, for the public to decide which electoral system would be used for the following two elections. Council revoked its decision to hold a poll on 23 May 2022, due to considerations on electoral systems by the Future for Local Government Review Panel.

DISCUSSION

[8] Section 27 of the Local Electoral Act 2001 requires local authorities to make a decision no later than 12 September 2023, if they wish to change the electoral system for the 2025 and 2028 triennial elections. Council does not have to make a decision however, and where no decision is made, the current system will continue to apply (unless changed as a result of a poll of electors or by a further resolution[2]). Council can also resolve by 21 February 2024 to hold a poll on the issue.

[9] Regardless of any decision by Council on the system to be used, the Council must give public notice, by 19 September 2023 of the decision made (if any) and the right of electors to demand a poll on the electoral system to be used at the next two triennial general elections of that Council, i.e. 2025 and 2028.

Electoral Systems

[10] Two electoral systems are available for use in the local government elections, First Past the Post and Single Transferable Vote. An explanation of each system is provided below:

[11] **First Past the Post (FPP)**

For local electoral purposes, the First Past the Post electoral system,—

(a) in the case of an election, has the following features:

i) voters may cast as many votes as there are positions to be filled:

(ii) where a single position is to be filled, the candidate who receives the highest number of votes is elected:

(iii) where more than 1 position is to be filled, the candidates equal to the number of positions who receive the highest number of votes are elected:

(b) in the case of a poll, has the features specified in paragraph (a) as if, with all necessary modifications, every reference to a candidate were a reference to the matter or matters that are the subject of the poll.

[12] **Single Transferable Vote (STV)**

[2] section 27(2)(b)(i) of the Local Electoral Act 2001

For local electoral purposes, the Single Transferable Voting electoral system,—

(a) in the case of an election for multi-member vacancies, has the following features:
  (i) voters express a first preference for 1 candidate and may express second and further preferences for other candidates:
  (ii) a quota for election is calculated from the number of votes and positions to be filled:
  (iii) the first preferences are counted and any candidate whose first preference votes equal or exceed the quota is elected:
  (iv) if insufficient candidates are elected under subparagraph (iii), the proportion of an elected candidate's votes above the quota is redistributed according to voters' further preferences, and—
    (A) candidates who then reach the quota are elected; and
    (B) the candidate with the fewest votes is excluded:
  (v) the excluded candidate's votes are redistributed according to voters' further preferences:
  (vi) if insufficient candidates are elected under subparagraphs (iv) and (v), the steps described in subparagraphs (iv) and (v) are repeated until all positions are filled:

(b) in the case of an election for a mayoral or single member vacancy, has the following features:
  (i) voters express a first preference for 1 candidate and may express second and further preferences for other candidates:
  (ii) an absolute majority of votes for election is calculated from the number of votes and positions to be filled:
  (iii) the first preferences are counted and, if a candidate's first preference votes equal or exceed the absolute majority of votes, that candidate is elected:
  (iv) if no candidate is elected under subparagraph (iii), the candidate with the fewest votes is excluded and that candidate's votes are redistributed according to voters' further preferences:
  (v) if no candidate is elected under subparagraph (iv), the steps described in subparagraph (iv) are repeated until a candidate is elected:

(c) in the case of a poll, has the features specified in paragraphs (a) and (b) as if, with all necessary modifications, every reference to a candidate were a reference to the matter or matters that are the subject of the poll.

d) The vote processing costs of STV are more expensive, as due to capturing all the different preferences there is more data to collect. A rough estimate for the ORC is that STV would cost around $25,000 more than FPP.

[13] For information, a comparison of systems used by Otago authorities is shown in the table below.

Otago Councils	System used
Central Otago District	FPP
Clutha District	FPP
Dunedin City Council	STV
Queenstown Lakes District	FPP
Waitaki District	FPP

Changing the Voting System

[14] There are three ways in which the electoral system used by a local authority may change, and these are as follows:

By a Resolution of Council:

[15] Section 27 of the Local Electoral Act 2001 provides that a council **may** resolve to change its system, with the resolution having to be made by 12 September 2023. If council does resolve to change the system from FPP to STV, then that system would be in place for two elections, i.e. 2025 and 2028.

Elector Demand for Poll:

[16] Section 28 of the Act provides that a council **must** give public notice no later than 19 September 2023 of the right of electors to demand a poll on the electoral system to be used, whether or not a resolution under Section 27 has been passed.

[17] If a resolution has been passed to change the voting system, the public notice must include notice of the resolution, the electoral system to be used and that a valid demand for a poll would be required to countermand the resolution made by Council

[18] To be successful, a demand for a poll must be signed by at least 5 percent of the electors enrolled to vote at the previous triennial election. If a valid demand is received prior to 21 February 2024 the poll must be held by 21 May 2024 and the results of the poll will be valid for the next two elections, being 2025 and 2028.

[19] If a valid demand is received after 21 February 2024 the poll must be held after 21 May 2024. The results of the poll would then be effective for the 2025 and 2028 elections.

Poll Held on Initiative of Council:

[20] Council may resolve that a poll be held on a proposal that a specified electoral system be used for its next two triennial elections. Such a resolution must be made no later than 21 February 2024 and the poll must be held by 21 May 2024. The costs associated with holding a poll would be unbudgeted expenditure.

Summary of timeframes

Date	Acting
12 September 2023 (or earlier)	Local authority **may** make a resolution on electoral system (S27)
19 September 2023 (or earlier)	Local authority **must** make a public notice on electoral system (S28)
21 February 2024	Last date to receive valid demand for poll on electoral systems for the 2025 elections (S30)
21 February 2024	Last date by which local authority **may** resolve to hold a poll (S31)
21 May 2024	Last date to conduct poll on electoral system for the 2025 elections (S33)

OPTIONS

[21] **Option 1** Council could resolve to either retain FPP or change to STV by 12 September 2023. A public notice by 19 September 2023 advising of the decision and the right of

electors to hold a poll will still be necessary. A workshop on electoral systems for councillors could be organised ahead of making the decision.

[22] **Option 2** Council could express the intention of holding a poll, but defer any decision on this until later, ensuring that such a resolution is made any time prior to 21 February 2024. A public notice by 19 September 2023 advising the right of electors to hold a poll will still be necessary.

[23] **Option 3** Council could choose not to make a decision and give public notice by 19 September 2023 that electors have the right to demand a poll on the electoral system to be used for the next two elections. If no demand for a poll is received by 21 February 2024, FPP continues to be used for the 2025 election.

CONSIDERATIONS

Policy Considerations

[24] N/A

Financial Considerations

[25] The costs for holding a poll have not been budgeted for in the 2023/24 Annual Plan.

[26] Should Council choose to change to STV voting, provision would be made in the 2025 elections budget for the additional costs associated with STV (estimated $25,000, due to the data processing being more expensive). Options would also be brought to Council for consideration for public education campaigns for ORC voters, so that they are aware of the shift and how STV works (particularly for voters in the districts that use FPP, where voted will use different systems on the voting forms).

Significance and Engagement

[27] Advice suggests that this decision does not meet the significance and engagement policy requiring consultation with the public. Public participation is enabled through the poll provisions within the Local Electoral Act.

[28] Council could choose to undertake some targeted engagement ahead of making a decision (for example with territorial authorities) should it wish to.

[29] Should Council decide to hold a poll, or to change the electoral system to STV, however, Council would need to consider public education activities, to ensure the options and outcomes were well understood by the public and also understood by voters in districts that may use the opposite electoral system.

Legislative Considerations

[30] The Local Electoral Act sets out the legislative requirements for the options available to Council.

Risk Considerations

[31] This decision is one for council to make under the Local Electoral Act, and there is limited risk to it.

NEXT STEPS

[32] To be determined.

ATTACHMENTS

Nil

8.8. Rates Report and Rates Resolution

Prepared for:	Council
Report No.	CS2323
Activity:	Governance Report
Author:	Sarah Munro, Finance Manager - Reporting
Endorsed by:	Nick Donnelly, General Manager Corporate Services
Date:	28 June 2023

PURPOSE

[1] The purpose of this report is to provide details of each of the rates to be set, and to recommend that Council adopts the rates resolution for the 2023-24 financial year.

EXECUTIVE SUMMARY

[2] Following the adoption of the Annual Plan 2023-24, Council is required to adopt a rates resolution, which formally sets the rates for the 2023-24 financial year.

[3] The rates resolution is attached to this report.

[4] A table is attached to this report showing the rate effect of the rates contained in the rating resolution on a range of properties within the Otago region. The table includes rates for the 2022-23 year for comparative purposes.

RECOMMENDATION

That the Council:

1) **Receives** this report and the attached Rating and Sample Reports.

2) **Adopts** the Rating Resolution for the 2023-24 financial year.

DISCUSSION

GENERAL RATES

[5] The GST inclusive general rate requirement for the 2023-24 year of $32,502,000 represents an increase of 22% on the 2022-23 rate of $26,596,000.

[6] Of the general rate requirement, the total amount of rates to be collected by way of Uniform Annual General Charge is $8,125,000 equating to a charge of $68.76 (including GST) on each rateable property compared to $57.11 in the 2022-23 year.

[7] General rates, excluding the portion collected as a Uniform Annual General Charge, are charged on a capital value basis.

Equalisation of capital values

[8] Revaluations of property for rating purposes are conducted on a cyclic three-yearly basis.

[9] The Dunedin City and the Central Otago Districts were reviewed during the current rating year. Waitaki and Clutha Districts were revalued in 2020. Queenstown Lakes District revaluation was carried out in 2021.

[10] Council obtained a certificate of projected values from Quotable Value Limited that provides an assessment of the overall "equalised" capital values of the city and each of the districts within Otago, as at the common date of 1 September 2022.

[11] The equalised values are applied to apportion the general rate amount to be collected on a capital value basis from the region as a whole and are also applied in those instances where rates are to be collected on a common basis where the rating base takes in more than one district.

[12] The following table shows the equalised values for the city and districts as at 1 September 2022 that are applicable for 2023-24 rates and the comparative values applicable to the 2022-23 rates.

Equalised capital values of Otago region				
	Value for the 2023/2024 year		Value for the 2022/2023 year	
City/District	Value $billion	District %	Value $billion	District %
Central Otago	17.911	12.56%	16.109	11.93%
Clutha	10.890	7.64%	9.821	7.28%
Dunedin	43.924	30.81%	44.404	32.89%
Queenstown	60.420	42.38%	56.315	41.71%
Waitaki (part)	9.429	6.61%	8.353	6.19%
Total	**142.574**	**100.00%**	**135.002**	**100.00%**

Significant general rate amounts

[13] The following are the significant general rate amounts to be levied on the basis of capital value:

	General Rates 2023/24 (GST Inclusive) $	General Rates 2023/24 (GST Inclusive) $
Contact Energy Limited:		
Clyde Hydro Dam	114,462	94,437
Roxburgh Hydro Dam	56,032	47,170
Dunedin Waste Water Business Unit:		
Three major facilities	186,564	203,029
Total	**357,058**	**346,636**
Percentage of total general rates	**1.10%**	**1.74%**

[14] The amount of general rate to be collected from these ratepayers, and the percentage of these rates in relation to the total general rate, is not considered unreasonable given the effects of the presence and operations of these properties.

RIVER AND WATERWAY MANAGEMENT RATES

[15] The targeted rates to be levied for the purposes of maintenance and enhancement of rivers and waterways within the territorial authority city/districts and within the Lower Waitaki river area are as follows:

River and waterway management rates (inclusive of GST)		
Rating Area	**2023/24 $**	**2022/23 $**
Central Otago District	414,000	391,000
Clutha District	483,000	449,000
Dunedin City	402,500	356,000
Queenstown-Lakes District- Wakatipu area	477,250	446,000
Queenstown-Lakes District- Wanaka area	362,250	336,000
Waitaki District	460,000	460,000
Lower Waitaki rating area	207,000	196,000
Total	**2,806,000**	**2,634,000**

[16] River and waterway management rates are assessed differentially on the rateable capital value of all rateable land situated within the territorial authority city/districts and within the Wakatipu and Wanaka waterway and river management rating districts. In respect of the Lower Waitaki scheme, the rates are assessed differentially on the rateable capital value of all rateable land within two scheme classifications.

FLOOD AND DRAINAGE SCHEME RATES

[17] The rating levels for the various flood protection and drainage scheme rating districts are as follows:

Flood and drainage scheme rates (inclusive of GST)		
Targeted Rating district	**2023/24 $**	**2022/23 $**
Rates charged on a capital value basis:		
Lower Taieri Flood	1,207,500	1,208,000
Lower Clutha Flood and drainage	1,207,500	1,092,000
Tokomairiro Drainage	195,501	184,000
Leith Flood protection	1,679,633	1,680,000
Rates charged on an area basis:		
West Taieri Drainage	943,001	943,000
East Taieri Drainage	736,001	736,000
Total	**5,969,136**	**5,843,000**

[18] These rates are levied on either a classified or differentially targeted basis in accordance with assessed benefits.

Lower Taieri, Lower Clutha and Tokomairiro Schemes

[19] The total rate requirement for these schemes is set on the capital value within each of the relevant classifications. The Lower Taieri Scheme has 21 classifications (WF5, WF6, WF7 and WF9 are not financially viable to rate on due to the administration cost being higher than rate collected e.g. less than $10 per classification), the Lower Clutha has 10 classifications, and the Tokomairiro has 7 classifications.

Leith Flood Protection

[20] This rate is set on a capital value basis comprising two classifications, the Direct Benefit Zone and the Indirect Benefit Zone.

[21] The Forsyth Barr Stadium is to contribute 4% of the rate requirement attributed to the Direct Benefit Zone, with other Direct Benefit Zone properties contributing 96% of the Direct Benefit Zone rate requirement.

West Taieri Drainage

[22] This rate is set on an area basis comprising five differential classifications.

[23] Of the total rate requirement, 30% is collected by way of a targeted uniform rate on classifications WD1 through to WD4 (inclusive), and the remainder is collected by way of a differential rate on classifications WD1 through to WD5 (inclusive).

East Taieri Drainage

[24] This rate is set on an area basis comprising 10 classifications.

[25] Of the total rate requirement, 25% is collected by way of a targeted uniform rate on all classifications except ED3, ED6 and ED7, and the remainder is collected by way of a differential rate on all classifications except ED3 and ED6.

DUNEDIN TRANSPORT RATE

[26] The Dunedin transport services targeted rate is to be levied on two classifications of ratepayer, Class A and Class B.

[27] Class A ratepayers are made up of those properties within the inner city and St Kilda/St Clair areas that do not have a land use description of any of the following:

- Residential: bach,
- Residential: multi-use within residential, multi-use residential,
- Residential: multi-unit,
- Residential: single unit excluding bach,
- Residential: vacant,
- MU: Residential

[28] Class B comprises all properties within the transport services targeted rating area other than those designated as Class A. Class A ratepayers will pay a differential rate equating to 3.75 times the amount paid by Class B ratepayers.

[29] Dunedin Transport rates to be levied are as follows:

Dunedin Transport Rate (inclusive of GST)		
Classification	**2023/24 $**	**2022/23 $**
Class A	2,532,960	2,164,000
Class B	7,069,519	5,901,000

Total	**9,602,479**	**8,065,000**

QUEENSTOWN TRANSPORT RATE

[30] The Queenstown transport services targeted rate is to be levied on two classifications of ratepayer, Class A and Class B. Class A ratepayers will pay a differential rate equating to 2.0 times the amount paid by Class B ratepayers.

[31] Class A ratepayers are made up of those properties within the Queenstown Transport Services Rating Area that have the land use description of:

- Commercial: Retail, Multi-use within Commercial, and Services,
- Community Services: Multi-use within Community Services,
- Multi-use: Commercial,
- Residential: Public Communal-licensed, and Public Communal-unlicensed,
- Transport: Air Transport, and Multi-use within Transport, and
- Recreational: Entertainment, Multi-use within recreational, Active indoor, Active outdoor, Passive indoor, and Passive outdoor.

[32] Class B comprises all properties within the Queenstown Transport Services rating area other than those designated as Class A.

[33] The Queenstown transport rates to be levied are as follows:

Queenstown Transport Rate (inclusive of GST)		
Classification	**2023/24 $**	**2022/23 $**
Class A	610,131	528,000
Class B	1,756,921	1,469,000
Total	**2,367,052**	**1,997,000**

RURAL WATER QUALITY RATE

[34] Rural Water Quality rate will be levied on the capital value of all rateable land situated within the Otago region that:
(a) Has a rural land use description; or
(b) Has a lifestyle land use description and a land area of at least two hectares.

[35] The proportion of the total rate requirement to be collected within each territorial authority district/city will be based on the equalised capital values of each district/city.

[36] The GST inclusive rate requirement of $2,015,000 for the 2023-24 year represents an increase of 102% on the amount of $995,000 levied in the 2022-23 period.

Rural Water Quality (inclusive of GST)		
Classification	**2023/24 $**	**2022/23 $**
Central Otago	441,431	219,000
Clutha	484,877	230,000
Dunedin	309,031	161,000
Queenstown	488,074	247,000

Waitaki (part)	291,655	138,000
Total	**2,015,068**	**995,000**

DAIRY MONITORING RATE

[37] The Dairy Monitoring rate will be levied on a targeted uniform basis on all rateable land, situated within the Otago region that operates a Dairy Farm.

[38] The GST inclusive rate requirement of $241,000 for the 2023-24 year represents an increase of 5% on the amount of $230,000 levied in the 2022-23 period.

WILDING TREE RATE

[39] The Wilding Tree rate will be levied on a targeted uniform basis on all rateable land situated within the Otago region.

[40] The GST inclusive rate requirement of $230,000 for the 2023-24 year remains the same as the rates levied in the 2022-23 period.

CIVIL DEFENCE AND EMERGENCY MANAGEMENT RATE

[41] The Civil Defence and Emergency Management rate will be levied on a targeted uniform basis on all rateable land situated within the Otago region.

[42] The GST inclusive rate requirement of $3,836,000 for the 2023-24 remains the same as the rates levied in the 2022-23 period.

BIOSECURITY RATE

[43] The Biosecurity rate is to fund the management of pest plants and animals. It will be assessed differentially on the rateable land value of all rateable land situated within the territorial authority city/districts.

Biosecurity Rates (inclusive of GST)		
Classification	**2023/24 $**	**2022/23 $**
Central Otago	545,555	441,000
Clutha	372,078	313,000
Dunedin	1,303,463	1,174,000
Queenstown	2,095,417	1,739,000
Waitaki (part)	258,175	218,000
Total	**4,574,688**	**3,885,000**

[44] The attached resolution provides that the due date for rates to be paid is 31 October 2023.

[45] It also provides for penalty dates in November 2023 and May 2024 as follows:

- A 10% penalty will apply to all unpaid rates on 1 November 2023.
- A 10% penalty will apply to all rates levied in previous financial years remaining unpaid on 1 May 2024.

Financial Considerations

[1] Financial considerations associated with this report have been reported separately as part of the Annual Plan 2023-24 adoption process.

Significance and Engagement

[2] Consultation on these rates requirements was undertaken as part of the Annual Plan 2023-24 consultation process with feedback submitted and considered as part of that process. Recommendations were made in regard to rate requirements and the details in the rates resolution reflect the amounts agreed.

Legislative and Risk Considerations

[3] The Otago Regional Council sets its rates in accordance with the requirements of the Local Government (Rating) Act 2002 - Sections 23 and 24, and the Local Government Act 2002.

Climate Change Considerations

[4] There are no climate change considerations associated with this report.

Communications Considerations

[5] There are no communications considerations associated with this report.

ATTACHMENTS

1. Rating Resolution for Adoption June 2023 [**8.8.1** - 9 pages]
2. Rating Report 2023 Sample Rates [**8.8.2** - 14 pages]

Rating Resolution for Adoption

That in accordance with the provisions of the Local Government (Rating) Act 2002, the Otago Regional Council Annual Plan 2023-24, and all other power or authorities in that behalf enabling it, the Otago Regional Council sets the following rates for the period commencing on the 1st day of July 2023 and ending on the 30th day of June 2024, namely:

1. General Rates

A Uniform Annual General Charge set under section 15 of the Local Government (Rating) Act 2002 made on every rating unit within the Otago region, assessed as a fixed amount of $68.76 per rating unit. Revenue sought from the Uniform Annual General Charge amounts to $8,125,487 (including GST).

A general rate set under sections 13 and 14 of the Local Government (Rating) Act 2002 made on every rating unit within the Otago region, assessed differentially on the rateable capital value of all rateable land situated within the territorial authority districts as detailed below:

District	Rate in $ on Capital Value	Revenue sought $
Central Otago	0.00016130	2,904,540
Clutha	0.00022294	1,955,417
Dunedin	0.00020013	8,813,338
Queenstown Lakes	0.00015825	9,072,319
Waitaki	0.00022276	1,630,846
Total		**24,376,460**

2. River and Waterway Management Rates

2.1 Territorial Authority Districts

For the purpose of providing for maintenance and enhancement works of waterways within the Otago region, a targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit, assessed differentially on the rateable capital value of all rateable land situated within the territorial authority districts and the Wakatipu and Wanaka river and waterway management rating districts, as detailed below:

District	Rate in $ on Capital Value	Revenue sought $
Central Otago District	0.00002299	414,000
Clutha District	0.00005507	483,000
Dunedin City	0.00000914	402,500
Waitaki District	0.00006283	460,000
Wakatipu River and Waterway Management Rating District	0.00001272	477,250
Wanaka River and Waterway Management Rating District	0.00001829	362,250
Total		**2,599,000**

2.2 Lower Waitaki Rating Area

For the purpose of providing for maintenance and enhancement works of waterways within the Lower Waitaki Rating Area, a targeted rate set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on every rating unit within the rating area, assessed differentially on the rateable capital value of all rateable land within the classifications as detailed below:

Lower Waitaki Rating Area		
Classification	**Rate in $ on Capital Value**	**Revenue sought $**
A	0.00154375	133,094
B	0.00077188	73,906
Total		**207,000**

3. Flood Protection and Drainage Scheme Rates

3.1 Lower Clutha, Tokomairiro and Lower Taieri Schemes

For the purpose of providing for the maintenance and improvement of works, in the river and drainage schemes listed below, a targeted rate set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, assessed differentially on the rateable capital value of all rateable land within the scheme classifications as detailed below.

The targeted rates set below are the rate in the dollar on the rateable capital value of rateable land situated within each classification.

Lower Clutha Flood Protection & Drainage Scheme		
Classification	**Rate in $ on Capital Value**	**Revenue Sought $**
A	0.00827182	51,550
B	0.00328441	199,668
C	0.00310193	389,782
D	0.00194629	69,761
E	0.00103397	64,103
F	0.00012164	42,890
U1	0.00328470	4,453
U2	0.00109480	284,385
U3	0.00024330	20,499
U4	0.00018247	80,409
Total		**1,207,500**

Tokomairiro Drainage Scheme		
Classification	**Rate in $ on Capital Value**	**Revenue Sought $**
A	0.00089669	9,422
B	0.00067254	19,004
C	0.00053802	23,784
D	0.00040353	37,388
E	0.00022418	21,580
F	0.00008967	29,161
U1	0.00013451	55,162
Total		**195,501**

Lower Taieri Flood Protection Scheme					
Classification	**Rate in $ on Capital Value**	**Revenue Sought $**	**Classification**	**Rate in $ on Capital Value**	**Revenue Sought $**
WF1	0.00194891	481,169	EF3	0.00109322	1,032
WF2	0.00115316	588,927	EF4	0.00088737	12,755
WF3	0.00001822	239	EF5	0.00002466	2,862
WF4	0.00002845	123	EF6	0.00109077	1,394
WF5	-	-	EF7	0.00001498	830
WF6	-	-	EF8	0.00001416	43,749
WF7	-	-	EF9	0.00000656	4,304
WF8	0.00013697	1,007	EF10	0.00000818	1,976
WF9	-	-	EF12	0.00128958	2,289
EF1	0.00105038	25,520	EF13	0.00128970	3,557
EF2	0.00109869	35,768			
Total					**1,207,500**

NOTE: The Lower Taieri Scheme has 21 classifications but WF5, WF6, WF7 and WF9 are not financially viable to rate on due to the administration cost being higher than rate collected e.g. less than $10 per classification.

3.2 East Taieri Scheme

For the purpose of providing for the maintenance and improvement of works, in the East Taieri drainage scheme, the following two rates are set:

Targeted Uniform Rate

A targeted uniform rate of $39.43 per hectare set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on all rating units on all land within the scheme area, except for land situated within classifications ED3, ED6 and ED7.

Revenue sought from the targeted uniform rate amounts to $184,000.

Targeted Differential Rate

A targeted rate set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, except those rating units situated within classifications ED3 and ED6, assessed differentially on the area of land of all rateable land situated within the scheme classifications as detailed below.

The targeted differential rates set below, are the dollars per hectare of rateable land situated within each classification.

East Taieri Drainage Scheme - Targeted Differential Rate		
Classification	**Rate $ per hectare**	**Revenue Sought $**
ED1	219.46	199,500
ED2	167.41	132,111
ED4	185.02	20,845
ED5	83.46	81,527
ED7	289.19	23,531
ED8	55.37	46,748
ED9	48.03	32,140
ED10	42.67	15,599
Total		**552,001**

3.3 West Taieri Scheme

For the purpose of providing for the maintenance and improvement of works, in the West Taieri drainage scheme, the following two rates are set:

Targeted Uniform Rate

A targeted uniform rate of $39.13 per hectare set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on all rating units on all land situated within classifications WD1, WD2, WD3 and WD4 located within the scheme area.

Revenue sought from the targeted uniform rate amounts to $282,900.

Targeted Differential Rate

A targeted rate set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, assessed differentially on the area of land of all rateable land situated within the scheme classifications as detailed below.

The targeted differential rates set below, are the dollars per hectare of rateable land situated within each classification.

West Taieri Drainage Scheme - Targeted Differential Rate		
Classification	**Rate $ per hectare**	**Revenue Sought $**
WD1	125.01	529,266
WD2	34.35	88,744
WD3	93.28	28,382
WD4	125.01	13,467
WD5	0.51	242
Total		**660,101**

3.4 Leith Flood Protection Scheme

For the purpose of providing for flood protection works, in the Leith Flood Protection scheme area, a targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, assessed differentially on the rateable capital value of all rateable land situated within the scheme classifications as detailed below:

Leith Flood Protection Scheme		
Classification	**Rate in $ on Capital Value**	**Revenue Sought $**
A – Direct benefit zone – Excluding Forsyth Barr Stadium	0.00054145	806,224
A – Direct benefit zone – Forsyth Barr Stadium only	0.00013161	33,593
B – Indirect benefit zone	0.00002848	839,816
Total		**1,679,633**

4. Transport Services Rates

For the purpose of providing for urban passenger transport services within the Dunedin city area and a service to Palmerston, and public passenger transport services within the Queenstown area, targeted rates set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit within the transport rating areas, assessed differentially on the rateable capital value of all rateable land situated within the transport rating classifications, as detailed below:

Dunedin Transport Services Rate		
Classification	**Rate in $ on Capital Value**	**Revenue Sought $**
Class A	0.00077984	2,532,960
Class B (within Dunedin City)	0.00020796	7,022,631
Class B (within Waitaki District)	0.00026617	46,888
Total		**9,602,479**

Queenstown Transport Services Rate		
Classification	**Rate in $ on Capital Value**	**Revenue Sought $**
Class A	0.00012264	610,131
Class B	0.00006132	1,756,921
Total		**2,367,052**

5. Rural Water Quality

Rate For the purpose of providing for the monitoring of rural water quality, a targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on the capital value of all rateable land situated within the territorial authority districts within the Otago region, that has a land use type being:

Rural land use types, as follows:

- Rural - Arable Farming
- Rural - Dairy
- Rural – Forestry
- Rural - Market Gardens and Orchards
- Rural - Mineral Extraction
- Rural - Multi-Use within Rural Industry
- Rural - Specialist Livestock
- Rural - Stock Finishing
- Rural - Store Livestock
- Rural - Vacant
- MU Rural Industry

Lifestyle land use types, with a land area of 2 hectares or greater, as follows:

- Lifestyle - Multi-Unit
- Lifestyle - Multi-Use within Lifestyle
- Lifestyle - Single Unit
- Lifestyle - Vacant
- MU Lifestyle

Rural Water Quality Rate		
	Rate in $ on Capital Value	**Revenue Sought $**
Central Otago	0.00006616	441,431
Clutha	0.00008255	484,877
Dunedin	0.00006616	309,031
Queenstown Lakes	0.00007052	488,074
Waitaki	0.00008468	291,655
Total		**2,015,068**

6. Dairy Monitoring Rate

For the purpose of providing for monitoring the environmental effect of dairy farms, a targeted uniform rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on all rateable land used for dairy farming in the Otago region.

Dairy Monitoring Rate		
	Uniform rate $	**Revenue Sought $**
All rating units	560.32	241,500
Total		**241,500**

7. Wilding Tree Rate

For the purpose of providing for the control of wilding trees, a targeted uniform rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on all rateable land in the Otago region.

Wilding Tree Rate		
	Uniform rate $	**Revenue Sought $**
All rating units	1.95	230,000
Total		**230,000**

8. Civil Defence and Emergency Management

Rate For the purpose of providing for Civil Defence and Emergency Management functions undertaken by the Council, a targeted uniform rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on all rateable land in the Otago region.

Civil Defence and Emergency Management Rate		
	Uniform rate $	**Revenue Sought $**
All rating units	32.47	3,836,398
Total		**3,836,398**

9. Biosecurity Rate

9.1 Territorial Authority Districts

For the purpose of managing pest plants and animals through inspections, education and promotion of landowner led initiatives alongside undertaking control works for specified pests including rooks and wallabies within the Otago region. This is a targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit, assessed differentially on the rateable land value of all rateable land situated within the territorial authority, as detailed below:

District	Rate in $ on Land Value	Revenue Sought $
Central Otago	0.00005468	545,555
Clutha	0.00006650	372,078
Dunedin	0.00005468	1,303,463
Queenstown Lakes	0.00006103	2,095,417
Waitaki	0.00006939	258,175
Total		**4,574,688**

10. Other Matters

10.1 Rate Collection

That the Otago Regional Council collects the rates set and assessed in the Otago region, and that the rates become due and payable on or before 31 October 2023.

10.2 Penalties on Unpaid Rates

Pursuant to Sections 57 and 58 of the Local Government (Rating) Act 2002, penalties will be added to unpaid rates assessed by the Council within the Otago region and due to the Council during the 2023/2024 financial year as follows:

a) A penalty of 10% to be added to rates assessed during the 2023/2024 financial year, or any previous financial year, and which remain unpaid on 1 November 2023.

b) A penalty of 10% to be added to rates which have been levied in any previous financial year and which remain unpaid on 1 May 2024.

Penalties will not be added to rate balances where the ratepayer has elected the weekly, fortnightly, month or tri-annual direct debit option of payment and where all payments under this payment option are honoured on the due payment date.

The amount of unpaid rates to which a penalty shall be added shall include:

- Any penalty previously added to unpaid rates under Section 58 of the Local Government (Rating) Act 2002.
- Any additional charges previously added to the amount of unpaid rates, and under Section 132 of the Rating Powers Act 1988.
- Any rates previously levied under the Rating Powers Act 1988 that remain unpaid.

10.3 Valuation and Rating Records

That the valuation rolls and rate records for the rates collected by the Otago Regional Council be made available for inspection during normal working hours at the office of the Council, Philip Laing House, Level 2, 144 Rattray Street, Dunedin.

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Dunedin City	Amount of rate per capital value							
Dunedin Residential 2023/2024	**$350,000**		**$700,000**		**$1,050,000**		**$1,400,000**	
Dunedin Residential 2022/2023	**$250,000**		**$500,000**		**$750,000**		**$1,000,000**	
Assumed Land Value - Biosecurity rate 2023/2024	*$195,500*		*$408,000*		*$612,000*		*$935,000*	
Assumed Land Value - Biosecurity rate 2022/2023	*$115,000*		*$240,000*		*$360,000*		*$550,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional rates								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	70.05	61.15	140.09	122.29	210.14	183.44	280.18	244.59
River & Waterway Management (CV)	3.20	2.81	6.40	5.63	9.60	8.44	12.80	11.25
Biosecurity (LV)	10.69	9.58	22.31	20.00	33.46	30.00	51.12	45.84
Leith scheme - indirect benefit (CV)	9.97	9.90	19.94	19.79	29.91	29.69	39.88	39.59
Transport - class B (CV)	72.79	60.75	145.57	121.49	218.36	182.24	291.14	242.98
	166.69	**144.19**	**334.31**	**289.21**	**501.46**	**433.81**	**675.12**	**584.25**
Total rates including Leith scheme indirect rate	**269.87**	**236.22**	**437.48**	**381.24**	**604.64**	**525.84**	**778.30**	**676.28**
Add the Leith scheme direct benefit rate margin (CV)	189.51	192.15	379.02	384.29	568.53	576.44	758.03	768.59
Total for properties in the Leith Direct Benefit zone	**449.41**	**418.47**	**796.56**	**745.74**	**1,143.26**	**1,072.60**	**1,496.46**	**1,405.28**

Due to the revaluation of the Dunedin district in the current year the capital values for the 2023/2024 rating period have been adjusted by 40% and land value by 70% to make the properties comparable to the 2022/2023 rating period.

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Dunedin City	Amount of rate per capital value							
Mosgiel Residential 2023/2024	**$350,000**		**$700,000**		**$1,050,000**		**$1,400,000**	
Mosgiel Residential 2022/2023	**$250,000**		**$500,000**		**$750,000**		**$1,000,000**	
Assumed Land Value - Biosecurity rate 2023/2024	*$195,500*		*$408,000*		*$612,000*		*$935,000*	
Assumed Land Value - Biosecurity rate 2022/2023	*$115,000*		*$240,000*		*$360,000*		*$550,000*	
Assumed hectares	*0.050*		*0.065*		*0.075*		*0.085*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	70.05	61.15	140.09	122.29	210.14	183.44	280.18	244.59
River & Waterway Management (CV)	3.20	2.81	6.40	5.63	9.60	8.44	12.80	11.25
Biosecurity (LV)	10.69	9.58	22.31	20.00	33.46	30.00	51.12	45.84
Transport - class B (CV)	72.79	60.75	145.57	121.49	218.36	182.24	291.14	242.98
Lower Taieri Flood - Class-EF8 (CV)	4.96	4.68	9.91	9.37	14.87	14.05	19.82	18.73
East Taieri Differential rate per ha - Class ED7	14.46	18.07	18.80	23.49	21.69	27.10	24.58	30.72
	176.13	**157.04**	**343.08**	**302.27**	**508.11**	**445.28**	**679.64**	**594.12**
Total rates	**279.31**	**249.07**	**446.25**	**394.30**	**611.28**	**537.31**	**782.82**	**686.15**

Due to the revaluation of the Dunedin district in the current year the capital values for the 2023/2024 rating period have been adjusted by 40% and land value by 70% to make the properties comparable to the 2022/2023 rating period.

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Dunedin City	Amount of rate per capital value							
Dunedin Commercial 2023/2024	**$700,000**		**$1,400,000**		**$2,100,000**		**$2,800,000**	
Dunedin Commercial 2022/2023	**$500,000**		**$1,000,000**		**$1,500,000**		**$2,000,000**	
Assumed Land Value - Biosecurity rate 2023/2024	*$425,000*		*$850,000*		*$1,275,000*		*$1,700,000*	
Assumed Land Value - Biosecurity rate 2022/2023	*$250,000*		*$500,000*		*$750,000*		*$1,000,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	140.09	122.29	280.18	244.59	420.27	366.88	560.37	489.18
River & Waterway Management (CV)	6.40	5.63	12.80	11.25	19.19	16.88	25.59	22.51
Biosecurity (LV)	23.24	20.84	46.48	41.67	69.71	62.51	92.95	83.34
Transport - class A (CV)	545.89	455.59	1,091.78	911.18	1,637.66	1,366.78	2,183.55	1,822.37
Leith scheme - indirect (CV)	19.94	19.79	39.88	39.59	59.82	59.38	79.76	79.17
	735.55	**624.14**	**1,471.11**	**1,248.28**	**2,206.66**	**1,872.43**	**2,942.22**	**2,496.57**
Total Rates	**838.73**	**716.17**	**1,574.29**	**1,340.31**	**2,309.84**	**1,964.46**	**3,045.39**	**2,588.60**

Due to the revaluation of the Dunedin district in the current year the capital values for the 2023/2024 rating period have been adjusted by 40% and land value by 70% to make the properties comparable to the 2022/2023 rating period.

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Dunedin City	Amount of rate per capital value							
West Taieri Farm 2023/2024	**$700,000**		**$1,120,000**		**$1,400,000**		**$2,100,000**	
West Taieri Farm 2022/2023	**$500,000**		**$800,000**		**$1,000,000**		**$1,500,000**	
Assumed Land Value - Biosecurity rate 2023/2024	*$765,000*		*$1,275,000*		*$1,615,000*		*$1,870,000*	
Assumed Land Value - Biosecurity rate 2022/2023	*$450,000*		*$750,000*		*$950,000*		*$1,100,000*	
Assumed hectares	15		20		30		50	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	140.09	122.29	224.15	195.67	280.18	244.59	420.27	366.88
River & Waterway Management (CV)	6.40	5.63	10.24	9.00	12.80	11.25	19.19	16.88
Biosecurity (LV)	41.83	37.50	69.71	62.51	88.30	79.17	102.25	91.67
Rural water quality (CV)	46.31	24.27	74.10	38.83	92.62	48.54	138.94	72.81
Lower Taieri Flood - Class WF1 (CV)	1,364.24	1,289.44	2,182.78	2,063.10	2,728.48	2,578.87	4,092.72	3,868.31
West Taieri drainage - Uniform rate per ha	586.98	630.52	782.65	840.69	1,173.97	1,261.04	1,956.61	2,101.73
West Taieri Differential rate per ha - Class WD1	1,875.18	2,038.21	2,500.24	2,717.61	3,750.36	4,076.42	6,250.60	6,794.03
	4,061.03	**4,147.86**	**5,843.86**	**5,927.42**	**8,126.71**	**8,299.89**	**12,980.58**	**13,312.32**
Total Rates - Non-Dairy Farm	**4,164.21**	**4,239.89**	**5,947.04**	**6,019.45**	**8,229.89**	**8,391.92**	**13,083.76**	**13,404.35**
Add Dairy Farm uniform rate	560.32	532.41	560.32	532.41	560.32	532.41	560.32	532.41
Total Rates - Dairy Farm	**4,724.54**	**4,772.30**	**6,507.37**	**6,551.85**	**8,790.22**	**8,924.33**	**13,644.09**	**13,936.76**

Due to the revaluation of the Dunedin district in the current year the capital values for the 2023/2024 rating period have been adjusted by 40% and land value by 70% to make the properties comparable to the 2022/2023 rating period.

Attachment to the Rates Resolution Report 2023/24 2023/24 rates for a sample of properties (2022/2023 year rates included for comparative purposes)								
Queenstown Lakes District	**Amount of rate per capital value**							
Wakatipu Residential	**$500,000**		**$750,000**		**$1,000,000**		**$1,500,000**	
Assumed Land Value - Biosecurity rate	*$340,000*		*$440,000*		*$560,000*		*$750,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	79.13	64.18	118.69	96.27	158.25	128.37	237.38	192.55
River & Waterway Management (CV)	6.36	6.08	9.54	9.12	12.72	12.16	19.08	18.24
Biosecurity (LV)	20.75	17.34	26.85	22.44	34.18	28.56	45.77	38.25
Transport - class B (CV)	30.66	26.54	45.99	39.81	61.32	53.08	91.98	79.62
	136.90	**114.14**	**201.07**	**167.65**	**266.47**	**222.17**	**394.22**	**328.66**
Total Rates	**240.08**	**206.17**	**304.25**	**259.68**	**369.65**	**314.20**	**497.39**	**420.69**

Attachment to the Rates Resolution Report 2023/24 2023/24 rates for a sample of properties (2022/2023 year rates included for comparative purposes)								
Queenstown Lakes District	**Amount of rate per capital value**							
Wanaka Residential	**$500,000**		**$750,000**		**$1,000,000**		**$1,500,000**	
Assumed Land Value - Biosecurity rate	*$340,000*		*$440,000*		*$560,000*		*$750,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	79.13	64.18	118.69	96.27	158.25	128.37	237.38	192.55
River & Waterway Management (CV)	9.14	8.71	13.72	13.06	18.29	17.42	27.43	26.13
Biosecurity (LV)	20.75	17.34	26.85	22.44	34.18	28.56	45.77	38.25
	109.02	**90.23**	**159.26**	**131.78**	**210.72**	**174.34**	**310.58**	**256.92**
Total Rates	**212.20**	**182.26**	**262.44**	**223.81**	**313.89**	**266.37**	**413.76**	**348.96**

Attachment to the Rates Resolution Report 2023/24 2023/24 rates for a sample of properties (2022/2023 year rates included for comparative purposes)								
Queenstown Lakes District	**Amount of rate per capital value**							
Wakatipu Commercial	**$500,000**		**$1,000,000**		**$1,500,000**		**$2,000,000**	
Assumed Land Value - Biosecurity rate	*$250,000*		*$500,000*		*$750,000*		*$1,000,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	79.13	64.18	158.25	128.37	237.38	192.55	316.51	256.73
River & Waterway Management (CV)	9.14	6.08	18.29	12.16	27.43	18.24	36.58	24.33
Biosecurity (LV)	15.26	12.75	30.51	25.50	45.77	38.25	61.03	51.00
Transport - class A (CV)	61.32	53.08	122.64	106.16	183.97	159.24	245.29	212.32
	164.85	**136.09**	**329.70**	**272.19**	**494.55**	**408.28**	**659.40**	**544.38**
Total Rates	**268.03**	**228.12**	**432.88**	**364.22**	**597.73**	**500.31**	**762.58**	**636.41**

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Central Otago District	Amount of rate per capital value							
Alexandra Residential 2023/2024	**$350,000**		**$700,000**		**$1,050,000**		**$1,400,000**	
Alexandra Residential 2022/2023	**$250,000**		**$500,000**		**$750,000**		**$1,000,000**	
Assumed Land Value - Biosecurity rate 2023/2024	*$172,500*		*$360,000*		*$540,000*		*$825,000*	
Assumed Land Value - Biosecurity rate 2022/2023	*$115,000*		*$240,000*		*$360,000*		*$550,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	56.45	43.52	112.91	87.04	169.36	130.56	225.82	174.09
River & Waterway Management (CV)	8.05	7.65	16.09	15.31	24.14	22.96	32.19	30.62
Biosecurity (LV)	9.43	7.60	19.68	15.85	29.53	23.78	45.11	36.33
	73.93	**58.77**	**148.69**	**118.20**	**223.03**	**177.31**	**303.12**	**241.03**
Total Rates	**177.11**	**150.80**	**251.87**	**210.24**	**326.21**	**269.34**	**406.29**	**333.06**

Due to the revaluation of the Central Otago district in the current year the capital values for the 2023/2024 rating period have been adjusted by 40% and land value by 50% to make the properties comparable to the 2022/2023 rating period.

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Central Otago District	Amount of rate per capital value							
Central Otago Farm 2023/2024	**$700,000**		**$1,400,000**		**$2,100,000**		**$2,800,000**	
Central Otago Farm 2022/2023	**$500,000**		**$1,000,000**		**$1,500,000**		**$2,000,000**	
Assumed Land Value - Biosecurity rate 2023/2024	*$562,500*		*$1,125,000*		*$1,687,500*		*$2,250,000*	
Assumed Land Value - Biosecurity rate 2022/2023	*$375,000*		*$750,000*		*$1,125,000*		*$1,500,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	112.91	87.04	225.82	174.09	338.73	261.13	451.64	348.17
River & Waterway Management (CV)	16.09	15.31	32.19	30.62	48.28	45.93	64.37	61.23
Biosecurity (LV)	30.76	24.77	61.51	49.54	92.27	74.31	123.02	99.08
Rural water quality - on qualifying land use types (CV)	46.31	22.17	92.62	44.34	138.94	66.52	185.25	88.69
	206.07	**149.29**	**412.14**	**298.59**	**618.21**	**447.88**	**824.29**	**597.18**
Total Rates - Non-Dairy Farm	**309.25**	**241.33**	**515.32**	**390.62**	**721.39**	**539.91**	**927.46**	**689.21**
Add Dairy Farm uniform rate	560.32	532.41	560.32	532.41	560.32	532.41	560.32	532.41
Total Rates - Dairy Farm	**869.57**	**773.73**	**1,075.65**	**923.03**	**1,281.72**	**1,072.32**	**1,487.79**	**1,221.62**

Due to the revaluation of the Central Otago district in the current year the capital values for the 2023/2024 rating period have been adjusted by 40% and land value by 50% to make the properties comparable to the 2022/2023 rating period.

Attachment to the Rates Resolution Report 2023/24 2023/24 rates for a sample of properties (2022/2023 year rates included for comparative purposes)								
Clutha District	**Amount of rate per capital value**							
Balclutha Residential	**$250,000**		**$500,000**		**$750,000**		**$1,000,000**	
Assumed Land Value - Biosecurity rate	*$115,000*		*$240,000*		*$360,000*		*$550,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	55.73	44.22	111.47	88.45	167.20	132.67	222.94	176.90
River & Waterway Management (CV)	13.77	12.85	27.53	25.70	41.30	38.55	55.07	51.40
Biosecurity (LV)	7.65	6.44	15.96	13.44	23.94	20.16	36.58	30.80
Lower Clutha Flood Protection - Class U2 (CV)	273.70	246.50	547.40	493.01	821.10	739.51	1,094.80	986.01
	350.85	**310.02**	**702.36**	**620.59**	**1,053.54**	**930.89**	**1,409.38**	**1,245.10**
Total Rates	**454.03**	**402.05**	**805.54**	**712.62**	**1,156.72**	**1,022.92**	**1,512.56**	**1,337.14**

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Clutha District	Amount of rate per capital value							
Milton Residential	**$250,000**		**$500,000**		**$750,000**		**$1,000,000**	
Assumed Land Value - Biosecurity rate	*$115,000*		*$240,000*		*$360,000*		*$550,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	55.73	44.22	111.47	88.45	167.20	132.67	222.94	176.90
River & Waterway Management (CV)	13.77	12.85	27.53	25.70	41.30	38.55	55.07	51.40
Biosecurity (LV)	7.65	6.44	15.96	13.44	23.94	20.16	36.58	30.80
Tokomairiro Drainage - Class U1 (CV)	33.63	31.93	67.25	63.85	100.88	95.78	134.51	127.71
	110.78	**95.44**	**222.22**	**191.44**	**333.32**	**287.16**	**449.09**	**386.80**
Total Rates	**213.95**	**187.47**	**325.39**	**283.47**	**436.50**	**379.19**	**552.26**	**478.83**

Attachment to the Rates Resolution Report 2023/24
2023/24 rates for a sample of properties
(2022/2023 year rates included for comparative purposes)

Clutha District	Amount of rate per capital value							
Clutha Farm	**$500,000**		**$1,000,000**		**$1,500,000**		**$2,000,000**	
Assumed Land Value - Biosecurity rate	*$375,000*		*$750,000*		*$1,125,000*		*$1,500,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	111.47	88.45	222.94	176.90	334.41	265.35	445.88	353.80
River & Waterway Management (CV)	27.53	25.70	55.07	51.40	82.60	77.10	110.13	102.80
Biosecurity (LV)	24.94	21.00	49.88	41.99	74.81	62.99	99.75	83.99
Lower Clutha Flood Protection - Class C (CV)	1,550.96	1,396.85	3,101.93	2,793.70	4,652.89	4,190.55	6,203.86	5,587.39
Rural water quality - on qualifying land use types (CV)	41.27	19.66	82.55	39.31	123.82	58.97	165.09	78.63
	1,756.18	**1,551.65**	**3,512.36**	**3,103.30**	**5,268.53**	**4,654.96**	**7,024.71**	**6,206.61**
Total Rates - Non-Dairy Farm	**1,859.36**	**1,643.68**	**3,615.53**	**3,195.34**	**5,371.71**	**4,746.99**	**7,127.89**	**6,298.64**
Add Dairy Farm uniform rate	560.32	532.41	560.32	532.41	560.32	532.41	560.32	532.41
Total Rates - Dairy Farm	**2,419.68**	**2,176.09**	**4,175.86**	**3,727.74**	**5,932.04**	**5,279.39**	**7,688.22**	**6,831.05**

Attachment to the Rates Resolution Report 2023/24 2023/24 rates for a sample of properties (2022/2023 year rates included for comparative purposes)								
Waitaki District	Amount of rate per capital value							
Oamaru Residential	**$250,000**		**$500,000**		**$750,000**		**$1,000,000**	
Assumed Land Value - Biosecurity rate	*$115,000*		*$240,000*		*$360,000*		*$550,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	55.69	43.12	111.38	86.23	167.07	129.35	222.76	172.47
River & Waterway Management (CV)	15.71	15.89	31.42	31.79	47.12	47.68	62.83	63.58
Biosecurity (LV)	7.98	6.77	16.65	14.12	24.98	21.18	38.16	32.36
	79.38	**65.78**	**159.45**	**132.14**	**239.17**	**198.21**	**323.75**	**268.40**
Total rates	**182.55**	**157.81**	**262.63**	**224.17**	**342.35**	**290.24**	**426.93**	**360.43**

Attachment to the Rates Resolution Report 2023/24 2023/24 rates for a sample of properties (2022/2023 year rates included for comparative purposes)								
Waitaki District	Amount of rate per capital value							
Waitaki Farm	**$500,000**		**$1,000,000**		**$1,500,000**		**$2,000,000**	
Assumed Land Value - Biosecurity rate	*$375,000*		*$750,000*		*$1,125,000*		*$1,500,000*	
	2023/2024	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23	**2023/2024**	2022/23
Uniform regional charges								
Uniform annual general charge	68.76	57.11	68.76	57.11	68.76	57.11	68.76	57.11
Emergency management uniform rate	32.47	32.95	32.47	32.95	32.47	32.95	32.47	32.95
Wilding trees uniform rate	1.95	1.98	1.95	1.98	1.95	1.98	1.95	1.98
	103.18	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**	**103.18**	**92.03**
Variable charges (capital value/land value/hectares)								
General rate (CV)	111.38	86.23	222.76	172.47	334.14	258.70	445.51	344.93
River & Waterway Management (CV)	31.42	31.79	62.83	63.58	94.25	95.37	125.66	127.16
Biosecurity (LV)	26.02	22.06	52.04	44.12	78.06	66.19	104.08	88.25
Rural water quality - on qualifying land use types (CV)	42.34	20.16	84.68	40.32	127.02	60.48	169.36	80.63
	211.15	**160.24**	**422.31**	**320.49**	**633.46**	**480.73**	**844.62**	**640.97**
Total Rates - Non-Dairy Farm	**314.33**	**252.27**	**525.49**	**412.52**	**736.64**	**572.76**	**947.79**	**733.00**
Add Dairy Farm uniform rate	560.32	532.41	560.32	532.41	560.32	532.41	560.32	532.41
Total Rates - Dairy Farm	**874.66**	**784.68**	**1,085.81**	**944.93**	**1,296.96**	**1,105.17**	**1,508.12**	**1,265.41**

8.9. May 2023 Budget Provision for Free & Half Price Public Transport Fares

Report No. OPS2322

Activity: Transport

LGOIMA:

Author: Lorraine Cheyne, Manager Transport

Endorsed by: Richard Saunders, Chief Executive

Date: 28 June 2023

PURPOSE

[1] The purpose of this report is to advise Council on the approach that staff have taken to enable ORC to implement the Government's policy to extend the Community Connect concessionary fares policy in Otago. The report also draws Councillor's attention to potential financial implications for future operation of bus services.

[2] There is also an update on the 26 April 2023 Council resolution to investigate free off-peak fares.

EXECUTIVE SUMMARY

[3] Community Connect is a programme to make public transport more affordable for Community Services Card (CSC) holders by providing a 50% discount on the standard adult fare for public transport services. The May 2022 Budget confirmed $98m across four years to support Public Transport Authorities (PTAs) to implement a national wide rollout. This scheme is due to take effect in Otago on 01 July 2023.

[4] On 18 May 2023 in the Budget, the Government announced $337 million of funding to extend the Community Connect scheme to:

- Children under 13 years of age – who will travel free at all times; and
- People aged 13 to 25 years of age – who will benefit from 50% off the normal fare (again at all times).

[5] The Community Connect extension is also the funding package to make half price Total Mobility fares permanent.

[6] There was no obligation for any Passenger Transport Authority (PTA) to opt into the Government scheme from 1 July. However, on the basis of previous councillor support for lower fares, and in alignment with the Regional Integrated Ticketing System (RITS) consortium, officers have worked to implement these changes. Opting in as of 1 July 2023, when the current half price scheme for all passengers comes to an end, ensures all fare changes come into effect on the same date, thereby minimising public confusion and costs of publicity and communications.

[7] There has also been interest in the idea of free off-peak fares. At the 26 April 2023 Regional Council meeting there was a resolution (Res CM22-290) which:
"Requests a report to be drafted by the transport team for presentation to the PATC on the feasibility of free off-peak public transport and the potential costs (e.g. lost revenue) and benefits (e.g. reduced pressure at peak times, reduced delays at peak times, equity impacts, reputation impacts) to help inform relevant LTP decisions."

[8] In addition, work is still underway on the Dunedin Fares & Frequency business case which will establish the costs and benefits of various changes to payment regimes in Dunedin.

RECOMMENDATION

That the Committee:

a) ***Receives** this report.*
b) ***Notes** implementation of the Community Connect extension from 01 July 2023, thereby changing current fare policies for people aged 5 to 24; and those who use Total Mobility.*
c) ***Notes** the concessionary fare will apply to all Council-operated bus services across the region, but not the ferry in Queenstown.*
d) ***Notes** that the Government will cover the cost of fare revenue foregone under the scheme.*
e) ***Notes** risks of future unbudgeted costs if additional peak bus capacity is required, because of increases in demand from the free / cheaper fares.*
f) ***Notes** that a policy assessment of free off-peak fares across the region will be reported to Council in August and will take account as much as possible of the implementation of the Community Connect extension.*
g) ***Notes** that the outcome of the Dunedin Fares & Frequencies business case is due to be reported back to Council in August, and the preferred fares option will be inclusive of the full Community Connect scheme fares regime.*

BACKGROUND

[9] The extension of the Community Connect scheme provides for everyone under the age of 25 to receive a concession – free for children under 13, and 50% off the standard fare for people 13 to 24 years of age. Reduced fares with the scheme in place (highlighted in green) are set out in the following tables:

Table 1: Dunedin Fares

Type	Passenger	Bee Card ($)	Cash ($)
Standard Fare (urban services)	Adult	2	3
	Child (5-18)	1.20	3
	Child (under 5)	0	0
Community Connect Extension Concessionary Fare (urban services)	Adult (19-24)	1	1.50
	Child (13-18)	0.60	1.50
	Child (under 13)	0	0

Table 2: Queenstown Fares

Type	Passenger	Bee Card ($)	Cash ($)
Standard Fare (urban services)	Adult	2	4
	Child (5-18)	1.50	4
	Child (under 5)	0	0
Community Connect Extension Concessionary Fare (urban services)	Adult (19-24)	1	2
	Child (13-18)	0.75	2
	Child (under 13)	0	0
Standard Fare (airport service)	Adult	2	10
	Child (5-18)	1.50	8
	Child (under 5)	0	0

Community Connect Extension Concessionary Fare (airport service)	Adult (19-24)	1	5
	Child (13-18)	0.75	4
	Child (under 13)	0	0

[10] The Community Connect scheme extension will replace current half price public transport fares, which have been in place for all passengers since April 2022. The likely impacts of the Community Connect scheme in conjunction with the return to the full $2.00 flat fare are unclear.

[11] A comparison of changes in passenger demand and revenue for the months of March 2022 (pre-half price fares) and March 2023 (post-half price fares), is shown in the following table:

Table 3: Comparison of Passenger Demand and Revenue: March 2022 Versus March 2023

Network	**Passenger Demand (March 2022 versus March 2023)**		**Revenue (March 2022 versus March 2023)**	
	Change (number)	*Change (%)*	*Change ($)*	*Change (%)*
Dunedin	+78,667	+37	-70,799	-27
Queenstown	+66,998	+125	+41,707	+49

[12] Following the COVID-19 pandemic, passenger demand and revenue was still not back to "normal" in March 2022, and so not all the increase can necessarily be attributed to the government's half fare policy. It should also be noted that the comparison is only for one month of data in each year. Nevertheless, the table shows a large passenger number and percentage increase in Dunedin (+37%) and especially Queenstown (+125%). The passenger demand increase in Queenstown more than offsets the halving of revenue from each fare collected. In Dunedin, reduction in revenue of 27% is lower than the 50% that would be expected if passenger numbers stayed the same.

DISCUSSION

[13] The Government's announcement of the extension to the Community Connect Scheme, provided a short time to prepare for the changes. However, which there has been media coverage of issues for the larger PTAs, all the RITS consortium will implement the Community Connect extension as the same date as the original scheme of 1 July 2023. There are clear advantages from a customer perspective in making one set of changes to fares at the same time. There were also efficiencies for the RITS group to design and test the fares changes as a group.

[14] As with other PTAs, ORC need to determine whether the Community Connect extension will only apply to people who possess a valid Bee Card. In line with the approach to the original scheme, and Council's policy in the Regional Public Transport Plan (RPTP) to employ a fare structure that supports the transition to cashless payment on public transport service over *threes*, it was determined to appropriate to only grant the free or half fare concession to Bee Card holders, to:

- Reduce the amount of cash that bus drivers have on the vehicle (which is a source of crime risk);
- Discourage abuse of the system by people who are not eligible for the concession;

- Reduce potential for confrontations with bus drivers, who could refuse people demanding a free or half price cash fare, if it is suspected they are not eligible, and
- Retain ability to obtain origin and destination data for passengers (when they tag on and tag off)

[15] Currently under 5s do not need a card to travel for free, and with free fares for under 13s their travel will be cashless. Additionally, there is a desire to support the principle of the government's intention when people who do not purchase a Bee Card (currently $5) could be disadvantaged, as they would have to pay the full cash fare.

[16] This concern can be addressed by Council offering free Bee Cards for new registered users for an initial period of three months as a suitable means of providing inclusive access to the scheme. This is consistent with initiatives Council typically undertakes to remove the barriers to students and younger passengers to becoming bus user, such as supplying card at "Tent City" and other orientation events.

[17] Currently no concessionary fares of any type are currently offered on the ferry in Queenstown and everyone, including Super Gold passengers and children over five years old, must pay $5 (with a Bee Card) or $7 (with a bank card). If a Community Connect concession was to be offered, then it would only be fair to do the same for others such as Super Gold. The Ferry Service is currently a trial service and is being run as net contract. Offering a concession would result in a significant financial cost to the Council and run the risk of increasing demand beyond capacity of the ferry.

[18] Revenue foregone, because of free and half price fares under the Community Connect extension, will be 100% funded by the Government. However, the Government will not fund:

- Issuing of free Bee cards for the first three months (and any subsequent promotional periods);
- Additional concessions which are more generous that the funded scheme; and
- Additional bus capacity which may be required because of an increase in passenger numbers resulting from the Community Connect extension.
- Potential increase in costs of providing security

[19] The bus capacity issue is one that result in additional unbudgeted expenditure, in terms of additional bus purchase, in-service hours and route kilometres. However, as seen in Table 3 some patronage growth may have been due to the half-price fares. While under 13s will travel for free from 1 July; 13 to 25-year-olds will merely continue to enjoy half price fares, but for adults over 26 and older the fare for card holders will return to $2.00. Staff will monitor passenger loadings at peak times and advise councillors of any required variations to current contracts, or if through the investigation of free off-peak fares, this presents as a means of managing peak demand.

[20] Councillors should also be aware of potential risks associated with the Community Connect scheme introduction, which will be monitored by staff as the scheme is implemented and evaluated. For this reason, it is advisable to wait for a period and allow the Community Connect scheme to bed in, before making any further changes to fares.

[21] Finally, it is noted that the Dunedin Fares & Frequency business case is nearing completion. Reporting and further advice on the outcome of the business case will take account of the full implementation of Community Connect and any learnings post 1 July.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[22] The ORC 2021/31 Long-term Plan (LTP) outlines how activities will help to achieve community outcomes. One of the outcomes that ORC aims to achieve is sustainable, safe, and inclusive transport.

[23] The Community Connect extension will significantly contribute to social inclusion through reducing financial barriers to use of bus services.

Financial Considerations

[24] For the free Bee card promotion, appropriate levels of budget have been identified and prioritised to deliver the proposed programme of activity. As noted above, further provision for additional bus capacity at peak times may also be required.

Significance and Engagement Considerations

[25] The decision to participate in the Community Connect scheme extension is within the RPTP policy:
"Provide and apply consistent fare concessions to targeted groups to improve community access to the public transport network."

[26] As such the scheme do not require public consultation.

Legislative and Considerations

[27] The Regional Public Transport Plan (RPTP) is produced under Part 5 (section 116 to 129) of the Land Transport Management Act 2003.

[28] The Regional Land Transport Plan (RLTP) is produced under Part 2 (sections 12 to 18) of the LTMA 2003.

Climate Change Considerations

[29] One of the aims of Community Connect is to reduce the number of Single Occupancy Vehicle (SOV) trips, in line with Vehicle Kilometres Travelled (VKT) targets which are part of the New Zealand Government Emissions Reduction Plan (ERP). Success in reducing levels of motor vehicle traffic have a direct climate change benefit through reducing levels of Greenhouse Gas (GHG) emissions.

NEXT STEPS

[30] Staff will actively monitor implementation, including the impact on passenger numbers.

[31] Future reporting on free off-peak fares and the outcome of the Dunedin Fares and Frequencies business case from August onwards will take into account full implementation of the Community Connect Scheme and any learnings post 1 July 2023.

ATTACHMENTS

{Attachment 1: Preliminary Risk Assessment - Extension to Community Connect}

Attachment 1: Risk and Mitigation Assessment

Risk	Description	Mitigation
Timing of scheme introduction.	There is only a very short time between a Council decision to proceed with the scheme, and implementation.	Staff have been preparing for the change in advance of a formal decision by Council, including testing of fare changes within the various systems.
Risk of scheme abuse.	Anyone who pays cash could simply ask for a concessionary fare, irrespective of whether they are eligible. Bus drivers could be put in an awkward and more dangerous position if they are expected to make judgements as to who is eligible (Ministry of Transport strongly discourage this approach).	The concession will only apply to people with a valid and registered Bee card. Whilst not infallible, the process of applying for a Bee card provides an extra step which may discourage at least some people from abusing the system. In the medium term, the council could consider an age-validation process and revenue protection scheme.
Lack of passenger data.	If Bee cards are not required for the concession, it will be impossible to collect complete information about where people get on or off, which is important for network planning purposes.	The concession will only apply to people with a valid and registered Bee card, which will be free to purchase for the first three months.
Anti-social behaviour on buses.	In some parts of the country free fares for children has been accompanied by a rise in anti-social behaviour. Bay of Plenty had to invest significant resources in security guards to deal with problems at several bus interchanges.	There is no specific evidence that a rise in anti-social behaviour is a significant risk in Otago. Staff will monitor the situation. Additional security / revenue protection officers could be deployed if required.
Levels of cash on buses.	Experience suggests that bus drivers can be seen as a relatively easy target. There may be a higher degree of robbery risk because of having higher amounts of cash in their box.	The concession will only apply to people with a valid and registered Bee card, which will be free to purchase for the first three months.
Stocks of Bee cards.	There may not be enough Bee cards for everyone who wants one, especially if they are made compulsory for everyone who wishes to benefit from the concession.	Discussions with the provider suggest there will be enough Bee cards to cover the three-month period where they are free.

Attachment 1: Risk and Mitigation Assessment

Risk	Description	Mitigation
	It is not clear how many people, who currently do not have a Bee card, may request one.	
Cash balances on Bee cards for children under 13.	Council may come under pressure to refund balances on Bee cards for children under 13 who will benefit from free fares (and therefore will no longer need their account to have a positive cash balance). There is no easy way to provide refunds on Bee card balances. Any refunds are currently not budgeted for by the council.	Clear communications have been issued which encourages children, who will be eligible for the free concession, to use up their balance before 01 July. When children get to 13 years of age, they will require a cash balance for the half price fare.
Current $3 default fare for failure to tag off.	The council may receive complaints if people are charged the full $3 fare, when they are expecting a charge of just $1 (i.e. half the adult Bee card fare).	The rules around application of default fares are well established and should be easy to understand. Communications on the rules have been issued in advance of scheme commencement.
Queenstown ferry.	There may be an expectation that concessionary fares apply to the ferry in Queenstown. If concessionary fares were to be introduced, it would need to be for all groups, including Super Gold. This could put pressure on ferry service capacity, and have significant financial implications for Council.	The policy of no concessionary fares for the ferry is clear and well-established. Communications on the rules have been issued in advance of scheme commencement.
Peak bus capacity.	Additional demand for travel may lead to over-capacity services, and additional costs of more buses, driver hours, and vehicle kilometres. Free fares for under 13s, and half fares for 13-24s, could increase demand to a point where peak services become crowded, and some passengers are not able to board. There could be resulting negative publicity and reputational damage to the council.	The recent half price fares scheme provides data on how demand has responded to cheaper bus travel. The fares and frequency business case (currently in preparation) can provide evidence on where buses are under pressure. Bee card data can provide information on number of people on individual peak services. Staff will monitor demand and peak loadings, and bring forward

Attachment 1: Risk and Mitigation Assessment

Risk	Description	Mitigation
	The government will not cover any additional operating costs resulting from increases in peak travel, and these will fall on the Council and, if they agree to provide FAR, Waka Kotahi.	proposals for service increases if required.
Fare reviews.	The government is basing the concession on fares as they were on 17 May 2023, which means that any future increase cannot be implemented until another date is set as the baseline. It will be difficult to forecast future revenue and farebox recovery in the absence of clarity as to when fares can be reviewed to cover increases in operating costs (especially in new contracts) or because of more buses to cover the peak demand. A peak / off peak price differential to manage demand on services could not be implemented in the short term, as the concessions would apply to fares frozen on 17 May.	The fares and frequency business case (currently in preparation) should set out future fare and ticketing policies, including future reviews and increases.

10.1. Chairperson's Report

Prepared for: Council

Activity: Governance Report

Author: Cr Robertson, Chairperson

Date: 21 June 2023

Welcome

This is the first Council Meeting for Richard Saunders as our new Chief Executive. Nau mai, haere mai (welcome) Richard!

Attendance at events

26 May Regional Sector Meeting, Wellington

A newsletter is being produced after each meeting to keep all member Councils informed of the meeting content, this has been circulated.

During this meeting, national portfolio themes were allocated to chairs. I was given the lead role on 2 of these: Freshwater Reform and Science. Chairs will work with Te Ura Kahika (collective identity for Regional and Unitary Authorities) to apply local knowledge and expertise for advancement of wellbeing, environment and community across the agreed priority themes through collective action. More information is available in the newsletter.

29 May Otago Boys High School (OBHS) Joint Students' Council

Cr Weir, Robyn Zink (Enviroschools Coordinator) and I met with Rohan O'Shea and students to discuss Buses, Bus Hub, Environment, etc... The Student Council have attracted national media attention for their proactive action to establish a national student council. There are opportunities for establishing a fruitful ongoing relationship here. Richard will also meet with Rohan this week.

29 May Mayor Dan Gordon

Met with Mayor Dan Gordon of Waimakariri District Council briefly. Mayor Gordon is the current Chair of Zone 5 (Upper South Island) and is standing for President of LGNZ.
Other candidates are Mayor Sam Broughton (Selwyn District Council) and Mayor Neil Holdom (New Plymouth District Council). Nominations for President and Deputy were open until 31 May. Mayor Broughton may also visit the South (TBC), if so there may be an opportunity for Councillors to meet him. The elections will be at the LGNZ AGM on 26 July.

30 May QLDC/ORC Joint Council Workshop on Future Development Strategies in Queenstown

30 May National Wilding Conifer Control Programme in Queenstown

The National Wilding Conifer Control Programme team at Biosecurity New Zealand jointly hosted this gathering with Whakatipu Wilding Control Group, Central Otago Wilding Conifer Control Group and Otago Regional Council.
Speakers: I was amongst the invited speakers who included Sherman Smith, Manager, National Wilding Conifer Control Programme, Biosecurity New Zealand; John Cooney, Chair, Central Otago Wilding Conifer Control Group; Grant Hensman, Chair, Whakatipu Wilding Control Group, Rob Phillips, Chair, Upper Clutha Wilding Tree Group.

31 May Pim Borren's Final Day
A farewell for Pim was held in the Council Chambers and over Teams in the morning.

1 June Richard Saunder's First Day as Chief Executive
Met with Richard and Cr MCall for our first weekly meeting.

1 June Hon Michael Wood, Minister of Transport - Community Connect (Zoom Meeting)
Meeting to discuss the implementation date of the Community Connect initiative, which will commence on 1 July 2023. The Government has committed $327 million in funding through Budget 2023 to expand the existing Community Connect programme. This funding will enable free public transport for children aged 5 to 12, half-price public transport fares for 13- to 24-year-olds, and half-price fares for Total Mobility Scheme passengers. Total Mobility is a bespoke transport service available to those unable to use public transport due to an impairment. Media have covered the 1 July implementation of this programme which sees the above changes (as well as retention of the off-peak concessions for SuperGold Card holders).

6 June South Dunedin Future - Joint workshop with DCC/ORC Councils

6 June Andrew Simms - Gordon Road Floodway
Introductory meeting with Cr McCall, Mr Simms and myself. This was a chance to speak about our respective roles and desire for open communication and engagement. We were able to give Andrew a high-level overview of engineering work we have planned on the Taieri this coming year and referred him for more detailed info from relevant staff.

7 June Pōwhiri for ORC Incoming Chief Executive Richard Saunders at Ōtākou Marae
A wonderful event to signify the important new beginnings for Richard and ORC as he commences his role as CE. The event involved Richard's family, Iwi, ORC Management Staff, Councillors and community stakeholders. Thank you to Te Runaka o Otakou for hosting the powhiri and the manaakitanga extended to us all. Thank you to the ORC Waiata Group for being with us and supporting us on the day, music was a special contribution to a moving day. Best wishes to Richard in his leadership of 'team ORC'.

8 June LWRP Governance Group Meeting

8 June CDEM Joint Committee
Agendas of these meetings are publicly available on:
https://www.otagocdem.govt.nz/otago-cdem/otago-cdem-group-joint-committee

9 June Otago Mayoral Forum/Te Rōpū Taiao
A website is being created to share the agendas and work of the forum, this should be completed within the next few weeks.

14 & 15 June LTP Current State Briefings
An excellent 2 days of internal presentations on current state (upcoming year's financial plan) work programmes by all managers. This information will be very useful in preparing for the LTP.

19 June Whare Rūnaka - Internal Steering Group Meeting

20 June Future for Local Government (FFLG) report: Confidential briefing for Mayors, Chairs and CEs

21 June ORC New Starter Induction with CE

RECOMMENDATION

That the Council:

1) ***Notes** this report.*

ATTACHMENTS

Nil

10.2. Chief Executive's Report

Prepared for: Council

Activity: Governance Report

Author: Richard Saunders, Chief Executive

Date: 21 June 2023

PURPOSE

[1] The purpose of this report is to update Councillors on key activities of the organisation as well as provide a suite of attachments to enable regular governance oversight of financial performance, service level delivery and key projects.

RECOMMENDATION

That the Council:

1) ***Notes** this report.*

DISCUSSION

[2] I would like to take this chance to formally thank the Council, along with mana whenua for the welcome I received at Ōtākau marae. The day was very special and it was great to have Councillors, mana whenua, ORC staff and key stakeholders present.

[3] I have drafted a new format for the CE's report aimed at giving governance regular oversight of the key areas of the business. I would welcome feedback from Councillors on the effectiveness of this reporting style which can be considered ahead of submitting my next report for the first Council meeting of the new financial year.

[4] The focus for the first month in my new role has been to connect with the wider ORC organisation and ensure the key deliverables of the council remain on track.

[5] The regional sector remains extremely busy. There are a number of legislative changes or reports which will impact on our business which we need to remain aware of. Some of the more significant ones are included below but this should not be considered an exhaustive list:

a. Freshwater Farm Plan regulations have now been gazetted. This is a major milestone in the broader essential freshwater package and ORC will have a significant role to play in overseeing this new system. We will need to work closely with our rural communities to communicate the impacts of this legislation on farmers in Otago.
b. Between completing this report and the meeting date, the Future for Local Government report would have been published. It will be important for ORC to review this and consider any immediate or long-term implications for the organisation.
c. Resource Management reform continues at pace. We are still expecting this to land prior to central government elections. Working closely with mana whenua and our TLA counterparts to understand the changes and develop a plan for successful implementation will be critical.

[6] It was great to see ORC shortlisted for an award at the LGNZ conference taking place in late July. Having our Intensive Winter Grazing project recognised in the SuperEngaged category is a fantastic achievement for our staff and also for our rural communities and industry groups who all supported and engaged with this programme. The approach has helped build strong relationships which will be pivotal as we move towards implementation for Freshwater Farm Plans and the new Land and Water Regional Plan.

[7] This report includes a suite of attachments which enable Council to monitor monthly performance in a number of key areas. This reporting is not intended to replace the in-depth reporting that occurs quarterly through the appropriate committee, or through existing project governance structures, but rather enables Council to have regular oversight of key areas of the business.

[8] A new project reporting framework has been introduced to enable monitoring of progress for key projects. Project reports for both the Land and Water Regional Plan (LWRP) and the Long Term Plan (LTP) are included as Attachments 1 and 2 respectively.

[9] The LWRP remains on track for delivery by 30 June 2024. While the project report shows a delay to some milestones, they are currently being managed by the project team and are not expected to impact on ORC's ability to notify a plan by 30 June 2024.

[10] The LTP project structure and project reporting has now been established. This first report sets out the key milestones to deliver on ORC's legislative responsibilities. At this early stage of the project there are no issues noted in the project report. The independent efficiency review required by Council resolution has now been progressed through procurement and will be completed in time to be considered as part of LTP considerations.

[11] Attachment 3 shows the ORC's delivery against the service levels included in the annual plan. This is an exceptions report showing overall tracking along with specific service levels which have had a change in status since the previous report. A brief comment is also provided to explain the rationale for the change.

[12] Attachments 4 and 5 provide a Statement of Comprehensive Revenue and Expenditure and a Statement of Financial Position respectively. These reports are to the end of May 2023.

OPTIONS

[13] As this is a report for noting there are no options.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[14] There are no strategic framework or policy considerations associated with this report.

Financial Considerations

[15] There are no financial considerations associated with this report.

Significance and Engagement

[16] As this is a report for nothing there are no significance and engagement considerations associated with this report.

Legislative and Risk Considerations

[17] There are no legislative and risk considerations associated with this report.

Climate Change Considerations

[18] There are no climate change considerations associated with this report.

Communications Considerations

[19] There are no communications considerations associated with this report.

ATTACHMENTS

1. ORC LWRP monthly report - May 2023 [**10.2.1** - 4 pages]
2. ORC LTP Project Report 21 June 2023 (1) [**10.2.2** - 3 pages]
3. Summary Levels of Service Report May 2023 [**10.2.3** - 1 page]
4. Statement of Comprehensive revenue and expenses [**10.2.4** - 1 page]
5. Statement of Financial Position [**10.2.5** - 1 page]

ORC REPORT ON PROGRESS AGAINST CRITICAL MILESTONES AND TASKS

Project Name	Project Sponsor	Report date	Project Start Date	Project End Date
Land and Water Regional Plan for Otago	Anita Dawe	31-May-23	1-Jul-21	30-Jun-24

Progress summary and focus for next month

This past month:

Plan drafting continues with direction provided by governance group, Council Committee and science modelling information that has been delivered in May. The Manuherekia Technical Advisory Group met on 10 May. Drafts of economic reports were reviewed by external reviewers and key internal ORC staff. Planning for the remaining community consultation and other engagement required under the NPS-FM was initiated.

Next month:

The governance group is meeting on 8 June to provide direction on drinking water protection zones and gravel management as well as to monitor the progress of the project. The June Council meeting will provide confirmation of direction on key plan approaches, such as water quality and quantity. There are a number of economic and science reports being finalised in June, and work continues on a comprehensive communications and engagement plan for the remainder of the project through to notification.

RESOURCE MANAGEMENT ACT PROCESS AND CRITICAL TASKS
CP1. Environmental Outcomes, Objectives, Provisions, Rules developed (July 2023)
CP2. Community consultation prior to formal Schedule 1 process (August - October 2023)
CP3. Pre-notification consultation (February - April 2024)
CP4. Public Notification (June 2024)

KEYS

RMA CRITICAL PATH	HEALTH	STATUS
Milestone is on the critical path	Work not yet due to start	1. Not due to start
	Meets or exceeds project expectations	2. Not started
	Issues are being managed within the team and not expected to impact final deadline	3. Ready to start
	issues impacting project and overall timeline and need escalation and action	4. Start delayed
	Milestone / task finished	5. On hold
		6. In progress
		7. Complete
		8. Withdrawn

	Milestone	RMA Critical Path	Baseline		Current/Amended		End date variance	Actual End Date	Health & Status	May commentary
			Start date	End date	Start date	End date				
Preparatory and plan writing work to get to community consultation 3										
1	Initial consultations with communities and key region-wide stakeholders complete. This is required by NPS-FM prior to plan drafting	CP1		20-Dec-22		20-Dec-22		20-Dec-22	Complete	
2	Community and mana whenua values identified with community and mana whenua. This is required by NPS-FM prior to plan drafting	CP1		31-Dec-22		31-Dec-22		20-Dec-22	Complete	
3	Analysis of feedback from community and key stakeholder consultation complete	CP1		31-Jan-23		31-Jan-23		31-Jan-23	Complete	
4	Catchment Stories Summary Report complete			30-Jan-23		30-Jan-23		30-Jan-23	Complete	
5	Region-wide topics plan drafting started (Milestone)		1-Feb-23	1-Feb-23	1-Feb-23	1-Feb-23		1-Feb-23	Complete	
6	Further direction from Land and Water Regional Plan governance group on water quantity management sought. This directly informs plan drafting	CP1		6-Apr-23		6-Apr-23		6-Apr-23	Complete	
7	Region-wide hydrological modelling complete. This informs plan drafting.	CP1		30-Apr-23		**31-May-23**	**1 month**		Complete	Outputs from the modelling have been produced and were provided to Policy as per the timeline on 31/05/23. For further context, the outputs are a list of catchments which will have bespoke Blue-Book type reports produced, a list of catchments which will be managed through the consenting process, and a list of catchments considered to be under-allocated according to the John Hayes memo advice. A report on the methodology is being produced too and is due end-June.

	Milestone	RMA Critical Path	Baseline		Current/Amended		End date variance	Actual End Date	Health & Status	May commentary
			Start date	End date	Start date	End date				
8	Manuherekia hydrological statement finalised by Technical Advisory Group			30-Apr-23		**30-Jun-23**	**2 months**		In progress	The Technical Advisory Group last met 10 May. This work is being managed at Project Sponsor level due to the prior delays and amended deadline, but is on track to meet the 30 June deadline.
9	Further direction from Land and Water Regional Plan governance group on water quality management sought. This directly informs plan drafting	CP1		4-May-23		4-May-23			Complete	Positive meeting and direction provided at the project governance group level on 4 May, and subsequently via a workshop held via an Environmental Science and Policy workshop on 25 May. Direction to be confirmed with Council during its 28 June meeting.
10	Water quality scenario modelling complete. This directly informs plan drafting	CP1		31-May-23		**15-Jun-23**			In progress	The under-protection risk has now been decided by the policy team and some further modelling is under-way. It is expected that the reports will be ready for external review in mid-June for policy to use as an input to their analysis and plan development. This does not impact the plan development timeline as Science and Policy work closely together sharing information iterately so that the plan drafting deadline of 31 July is achieveable.
11	Outstanding water bodies identified			31-May-23		31-May-23		30-Apr-23	Complete	This work was completed in April. A partial revision of the draft reports and a re-assessment of the outstanding water may be required following the RPS process as a change to the identification criteria stated in the oRPS has been recommended.
12	Manuherekia ecological flow recommendation provided by Technical Advisory Group			31-May-23		**30-Jun-23**	**2 months**		In progress	The Technical Advisory Group last met 10 May. This work is being managed at Project Sponsor level due to the prior delays and amended deadline, but is on track to meet the 30 June deadline.
13	Further direction from Land and Water Regional Plan governance group on drinking water protection requirements sought.	CP1		6-Jun-23		6-Jun-23			In progress	A paper on this topic has been prepared and is being presented and discussed at the 8 June governance group meeting.
14	Regionally significant wetlands mapped and ground truthed			30-Jun-23		30-Jun-23			In progress	Groundtruthing continues and will be complete by end June.
15	Land and Water Economic Profile of Otago complete (Milestone)			30-Jun-23		30-Jun-23			In progress	The Profile has been drafted and reviewed by external parties and key ORC staff. Following feedback via this review process the Profile is being finalised now and on track to be delivered by 30 June.
16	Farmers and Growers Phase 2 report on testing the impact of actions complete (Milestone)			30-Jun-23		30-Jun-23			In progress	The draft report has been received and has been reviewed by external reviewers from MPI and Waikato Regional Council. It is in the process of being finalised now and will be delivered by 30 June.
17	Threatened species identified (via independent expert panel)			30-Jun-23		30-Jun-23			In progress	The draft report has been received and reviewed. The final report with species identifications is on track to be delivered by 30 June.
18	Environmental outcomes, current states and target attribute states determined for all FMUs	CP1		30-Jun-23		30-Jun-23			In progress	Draft environmental outcomes prepared, current state data is abailable, and FMU level target attribute state setting on track for completion by 30 June.
19	Māori economy report completed by ORC and Iwi			31-Jul-23		**31-Aug-23**	**1 month**		In progress	This work requires more time to complete as key Iwi staff are working on the RPS hearings. This isn't expected to impact on the overall timeline as there is time scheduled in the 3rd and 4th quarter of 2023 to further incorporate information from this report, as well as from work relating to the RPS hearings.

	Milestone	RMA Critical Path	Baseline		Current/Amended		End date variance	Actual End Date	Health & Status	May commentary
			Start date	End date	Start date	End date				
20	Higher allocation catchment assessments complete (excluding Taieri)			31-Jul-23		31-Jul-23			In progress	This work is tracking to time. Completion varies by catchment. Habitat modelling has been completed. Catchment assessments are being done in tranches, with first three to April successfully completed on time Next tranch over 50% complete and due to be complete by end June. In the Arrow, Cardrona and Lindis catchments the existing Science reports will be used by Policy (as discussed in meeting 31st May).
21	All draft region-wide objectives, policies, provisions, rules complete	CP2		31-Jul-23		31-Jul-23			In progress	No change from April report. This milestone is tracking to time based on successful completion of CP1 milestones.
22	Draft Catlins FMU Chapter complete			31-Jul-23		31-Jul-23			Not due to start	
23	Draft Clutha/Mata-Au Chapter complete			31-Jul-23		31-Jul-23			Not due to start	
24	Draft Dunedin and Coast Chapter complete			31-Jul-23		31-Jul-23			Not due to start	
25	Draft North Otago Chapter complete			31-Jul-23		31-Jul-23			Not due to start	
26	All draft FMU chapters complete (except Taieri and Manuherekia Rohe)	CP2		31-Jul-23		31-Jul-23			Not due to start	
27	Draft introduction, how the plan works, intepretation chapters			30-Sep-23		30-Sep-23			In progress	Early drafting has begun on this chapter which is ahead of schedule.
28	Draft national direction chapter and regional context content			30-Sep-23		30-Sep-23			In progress	Early drafting has begun on this chapter which is ahead of schedule.
29	Draft mana whenua chapter complete			30-Sep-23		30-Sep-23			In progress	ORC and Iwi are working on the integration of mana whenua values, objectives, and outcomes into the plan document and what will be contained in a mana whenua chapter at present. The mana whenua chapter will only contain what is legally required for that chapter following integration throughout the plan.
30	Draft schedules and appendices complete			30-Sep-23		30-Sep-23			In progress	A list of schedules and appendices has been compiled. The next step is to determine what changes and new schedules are required following the development of region-wide and FMU specific provisions. The internal approach to developing maps is being determined in May so that maps can then be updated or commissioned and delivered by end Sep 23.
31	Draft Taieri Chapter complete			30-Oct-23		30-Oct-23			Not due to start	
32	Manuherekia Rohe chapter complete	CP2		31-Oct-23		31-Oct-23			Not due to start	
Community consultation prior to formal Schedule 1 process										
33	3rd and final community and key stakeholder consultation planning initiated			1-Jun-23		1-Jun-23			Complete	Policy and the Communications team met 2 May to initiate this work. Planning is ongoing.
34	Community consultation 3 meetings complete	CP2		30-Sep-23		30-Sep-23			Not due to start	
35	Key stakeholder report backs on region-wide topics complete			30-Sep-23		30-Sep-23			Not due to start	
36	Report back to Manuherekia Rohe community on provisions and	CP2		15-Oct-23		15-Oct-23			Not due to start	
37	Economic Impact Assessment of draft plan complete (To inform the Section 32 Report)			30-Oct-23		30-Oct-23			Not due to start	
38	Full draft plan reviews by Planning Lead, affected ORC teams, Iwi, Legal complete			30-Nov-23		30-Nov-23			Not due to start	
39	Draft Proposed Land and Water Regional Plan and draft Section 32 report complete. These are required in order for Clause 3 & 4A pre-notification and notification	CP3		30-Nov-23		30-Nov-23			In progress	Plan authors are collating supporting evidence as they develop plan chapters throughout. The Section 32 Report involves a significant amount of work which is being worked on iteratively as the plan is developed. The project is monitoring any additional resources required here.
40	Draft Land and Water Regional Plan complete and ready for pre-notification consultation	CP3		30-Nov-23		30-Nov-23			Not due to start	
Pre-notification consultation and public notification										
41	Draft Proposed Land and Water Regional Plan pre-notification consultation with Iwi and statutory parties (under RMA Sch 1,	CP4		28-Feb-24		28-Feb-24			Not due to start	

	Milestone	RMA Critical Path	Baseline		Current/Amended		End date variance	Actual End Date	Health & Status	May commentary
			Start date	End date	Start date	End date				
42	Draft Proposed Land and Water Regional Plan pre-notification consultation with Iwi and statutory parties (under RMA Sch 1,	CP4		30-Apr-24		30-Apr-24			Not due to start	
43	Updates to Draft Proposed Land and Water Regional Plan complete			31-May-24		31-May-24			Not due to start	
44	Section 32 report complete			31-May-24		31-May-24			Not due to start	
45	Otago Regional Council resolution to notify Proposed Land and Water Regional Plan for Otago	CP4		14-Jun-24		14-Jun-24			Not due to start	
46	Proposed Land and Water Regional Plan for Otago publicly notified	CP4		28-Jun-24		28-Jun-24			Not due to start	

Otago Regional Council

ORC report on Long Term Plan project progress against critical milestones and tasks

Project Name	Project Lead	Current Reporting Period	Previous Reporting Period
Long Term Plan	**Mike Roesler**	**9 May – 21 June**	**N/A; this is the first report**

Progress summary and focus for next month

Achievements this month

- Project manager appointed.
- Draft activity planning for next 90 days completed.
- Initial engagement with managers on internal communications/lead in times for LTP processes.
- Dates for council input planned
- Council governance group established
- Current state presentations to council on 14 and 15 June

Next month

- Finalising timetable and meeting slots for engagement with council
- Reflecting on feedback and lessons from OAG report on 2018-28 process
- Engagement approach to partners and stakeholders drafted
- Futures forecast and priority statements finalised (in Strategic Directions workstream); will inform LTP risks, assumption

On the horizon (August and beyond)

- Engagement approach LTP planning socialised with councillors
- BAU/Mandatory activities for ORC presented for discussion
- Staff presentation to council on options for key proposals and service changes
- Communications plan for LTP presented to Councillors for feedback

Risks and Issues

Risk	Mitigation
That the planned time for elected governance to consider LTP matters is not available, and slippage occurs, or decisions are not made.	Project manager to meet with Amanda Vercoe to book all timeslots and sessions with council. Meeting material to be pre-circulated to enable focussed discussion at sessions. Workshops to be recorded to enable Councillors not present to review and provide feedback.
Project management and governance needs to be tightly managed to avoid quality and time issues.	Project manager has been appointed, governance group set up and regular governance cycle has started. Review in 3 months.
Alignment between LTP and strategic directions. The risk is that strategic direction is not appropriately reflected in LTP decision-making.	Project set up to cover all aspects of this and LTP is being managed within the context of this project to make sure all parts of organisation have visibility. That Council provide early feedback on 'Strategic Directions' and that staff reflect SD where possible and appropriate in planning future delivery.

Areas for discussion

Area:
At request of project sponsor as project is currently in Establishment phase.

Otago Regional Council

Key		
Status	**Health**	**Colour**
1. Not due to start	Work not yet due to start	
2. Not started	Meets or exceeds project expectations	
3. Ready to start	Issues are being managed within the team and not expected to impact final deadline	
4. Start delayed	Issues impacting project and overall timeline and need escalation and action	
5. On hold	Milestone / task finished	
6. In progress		
7. Complete		

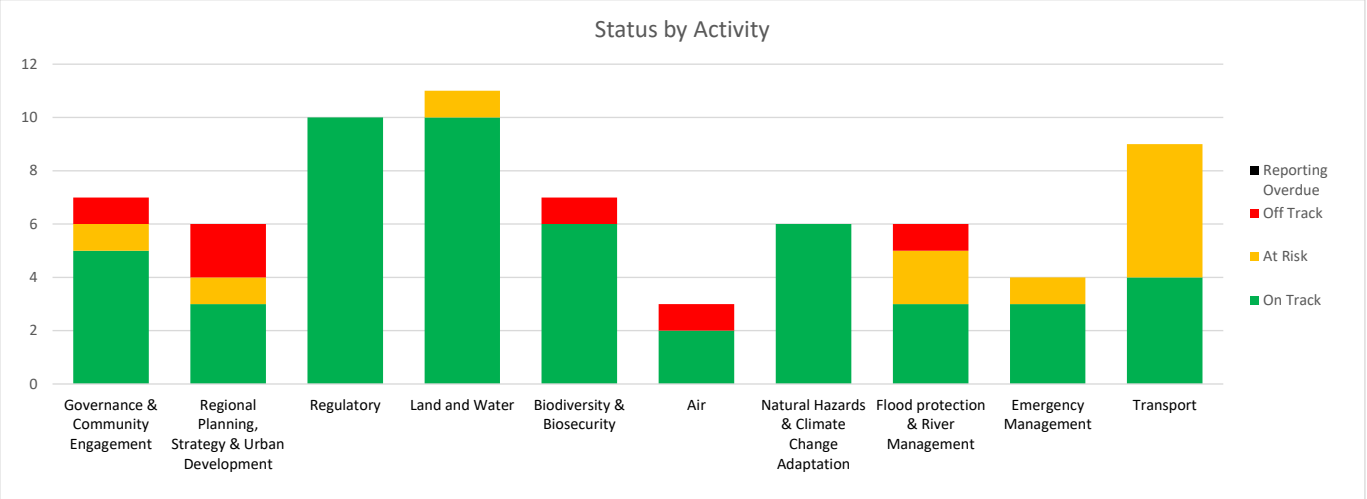
Milestone	Start date	End date	Health and Status	Commentary
Councillor workshops and decision making				
Council Briefing held: Current State presentation	14/06/2023	15/06/2023	Complete	Completed on 15/06/23.
Current State updated following council feedback	16/06/2023	29/06/2023	In progress	Mike is working through approximately 6 questions to get answers to councillors by this date.
Council session on service delivery changes	03/07/2023	26/07/2023	Not due to start	Dependency on strategic directions priority statements session with council on 29 June. These statements need to have enough detail to inform possible service delivery changes
Initial council session on engagement approach for LTP	10/07/2023	27/07/2023	Not due to start	Overview of process for council.
Infrastructure Strategy (Safety Resilience committee) Scope of infrastructure review agreed	17/07/2023	10/08/2023	Not due to start	Key dependency on confirming priorities
Draft communications plan presented to regional leadership committee for input	03/07/2023	15/08/2023	Not due to start	Key dependency on confirming engagement approach. Work has started on this that will inform communications plan.
Staff presentation to council on options for key proposals/business cases and service changes	07/08/2023	07/09/2023	Not due to start	Key dependency on confirming priorities. Manager briefing will be held.
Communications plan for LTP submitted to council	16/08/2023	07/09/2023	Not due to start	Feedback from Regional Leadership Committee will be used to inform this in advance of presenting to council.
Council update on LTP detailed planning, budgeting and other supporting information	16/10/2023	09/11/2023	Not due to start	Update item only.
Council endorsement for key LTP content and Supporting Information for consultation	06/10/2023	06/12/2023	Not due to start	Need to check if the scope of this covers supporting information for consultation.
Council approval for Consultation Document and draft supporting Information	15/01/2024	01/02/2024	Not due to start	Placeholder end date, waiting on council meeting dates for 2024.
Financial and rates				
Council presentation - Financial/funding: Financial strategy	14/06/2023	29/06/2023	In progress	Presentation being prepared by Nick.
Council presentation - Financial/funding: Rating specifics	10/07/2023	27/07/2023	Not due to start	
Council presentation - Financial/funding: report back rating models and options	04/09/2023	21/09/2023	Not due to start	
Draft Financial Strategy and Revenue & Financing Policy submitted to council for approval	02/10/2023	25/10/2023	Not due to start	
Engagement and communications				
Engagement approach for LTP consultation drafted	12/06/2023	27/07/2023	In progress	Scoping conversations held with Andrea and Mike. Initial thinking underway.

Communications plan presented to regional leadership committee	01/08/2023	15/08/2023	Not due to start	For input, as set out above.
Communications plan for LTP submitted to council	10/08/2023	15/08/2023	Not due to start	Note engagement approach confirmation is a key dependency for this plan.
Key proposals and changes engagement commences with strategic stakeholders	04/09/2023	21/09/2023	In progress	Will inform part of engagement approach.
Approach to communicating key topics to the community (for SCP) agreed internally	04/09/2023	21/09/2023	Not due to start	Note this is a separate communications plan.
Project planning				
OAG/external assessments of LTP process read and socialised	21/06/2023	26/06/2023	Not due to start	Use OAG report to support approach and update project plan as required. Add to project plan as quality control re best practice.
Lessons from OAG around consultation incorporated into project plan	21/06/2023	26/06/2023	Not due to start	Project manager to update project plan as required.
Key reporting structural elements for the LTP identified	06/06/2023	01/07/2023	In progress	Initial discussions with LTP lead and project team.
LTP project planning for next 90 days	09/06/2023	09/07/2023	In progress	Regular project team meetings underway. Workstream briefs 70% complete. Detailed activity planning 50% complete.
BAU/Mandatory/enduring activities for ORC confirmed	01/07/2023	01/08/2023	In progress	Initial conversation with ELT 19/05/23. Feedback received and approach updated. Key dependency on priority statements from council.
Key LTP proposals and service changes tested and agreed by staff	01/07/2023	01/08/2023	Not due to start	Project deliverable.
Strategic directions to inform growth models, uncertainties and assumptions identified	31/07/2023	04/08/2023	In progress	Some have been identified as part of council workshops.
Decision on key crosscutting programmes made by ELT as a subset of domains - biodiversity and climate change	21/06/2023	10/08/2023	Not due to start	Need to book time for July or August ELT meeting. Scope of this activity needs clarifying.
Growth models, uncertainties and assumptions reviewed by council to inform LTP	07/08/2023	20/09/2023	Not due to start	Council milestone.

LTP Project Workstreams GANTT Chart overview

LTP Workstreams	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Long Term Plan	Delivery of a draft LTP						
Engagement and Communications	Engagement approach		Comms Plan		Marketing and comms		Draft LTP Direction
Partnering with Mana Whenua		Plan for working with MW					

MAY PERFORMANCE REPORTING - EXCEPTIONS TO Q3 REPORT



Service Measure and Target	Q3	NOW	COMMENT
REGIONAL LEADERSHIP	**Q3**	**NOW**	**COMMENT**
Develop an integrated planning framework that enables well managed urban growth across Otago - Target: Develop draft regional Urban Development Strategy by 30 June			Future Development Strategies prioritised, scoping expected to start next financial year
ENVIRONMENT	**Q3**	**NOW**	**COMMENT**
Implement freshwater and estuarine monitoring programmes. Target: Annual report on monitoring programme completed and reported to Council			Will be presented to ES&P Committee on 29 June
Develop and implement a regional indigenous biodiversity ecosystems monitoring programme. Target: Develop monitoring programme (including requirements of NPSIB*) and report to Council by 30 June			On hold until NPS-IB lands, unlikely prior to central govt elections
TRANSPORT	**Q3**	**NOW**	**COMMENT**
Overall passenger satisfaction with Dunedin Public Transport system at annual survey - Target 97%			Overall satisfaction with the Dunedin PT network is 86%
The Regional Land Transport Plan (RLTP) is prepared and submitted in line with the Land Transport Management Act 2003 and any guidance issued by the New Zealand Transport Agency (NZTA) - Target: RLTP implementation progress reported annually to Regional Transport Committee.			Wanaka business case work on hold pending trial extension
Percentage of scheduled services delivered (reliability) - Target: 95%			Unlikely annual target of 95% will be achieved due to underperformance in previous months
Overall passenger satisfaction with Wakatipu Public Transport system at annual survey - Target 97%			Overall satisfaction with the Queenstown PT network is 92%
Percentage of users who are satisfied with the provision of timetable and services information - Target: Maintain or increase (from 2022 baselines - DN: 70%, QWTN: 88%)			Level of missed services impacted results. Dunedin 64% and Queenstown 81%

On Track	At Risk	Off Track	Not Measured	Reporting Overdue

Statement of Comprehensive Revenue and Expense for the 11-month period ended 31 May 2023

	Notes	Actual 2023 11 month period	Annual Plan 2023 11 month period	Variance 1 month period	Forecast 2023 12 month period	Budget AP 22/23 12 month period	Variance 12 month period
REVENUE							
Rates revenue		43,370	43,257	113	47,228	47,228	-
Subsidies and grant revenue		20,851	18,533	2,318	25,290	22,102	3,188
Other income		10,188	13,737	(3,548)	10,830	15,989	(5,159)
Dividends		13,272	12,833	438	14,000	14,000	-
Interest and investment income		4,363	688	3,676	4,920	750	4,170
TOTAL REVENUE		**92,044**	**89,048**	**2,996**	**102,268**	**100,069**	**2,199**
EXPENDITURE							
Employee benefits expense		(26,846)	(29,968)	3,122	(29,366)	(32,692)	3,326
Depreciation and amortisation		(3,804)	(3,990)	186	(4,356)	(4,356)	-
Finance costs		(4,549)	(229)	(4,320)	(4,470)	(250)	(4,220)
Other expenses		(59,893)	(60,908)	1,015	(69,943)	(66,022)	(3,922)
TOTAL OPERATING EXPENDITURE		**(95,091)**	**(95,095)**	**4**	**(108,136)**	**(103,320)**	**(4,817)**
OPERATING SURPLUS/(DEFICIT)		**(3,047)**	**(6,047)**	**3,000**	**(5,868)**	**(3,251)**	**(2,618)**
Other gains/(losses)		1,363	975	388	1,064	1,064	-
Revaluation gain/(loss)–shares of subsidiary		-	-	-	24,531	24,531	-
Income tax benefit/(expense)		2	-	2	100	-	100
SURPLUS/(DEFICIT)		**(1,681)**	**(5,072)**	**3,390**	**19,827**	**22,344**	**(2,518)**

Notes explaining the major factors causing variances

- Subsidies and grant revenue has increased $2,318,000 above budget. The majority of this movement is caused by the allocation of fare and NZTA revenue compared to the expectation in the budget. NZTA is paying 50% fares, this is recorded as subsidies and grant revenue but was budgeted to be other income paid as bus fares from customers. NZTA is not funding the budgeted fare difference between budgeted fares and the $2 flat fares.

- The majority of the Interest and investment income and finance cost variance of $3,676,000 and $4,320,000 has been caused by the budget showing a net position of the Port Otago loan interest. Port Otago loan interest is required to be shown as interest income and expense for Council in the Statement of Comprehensive Revenue and Expenses.

- Employee benefits expenses is $3,122,000 below budget due to vacancies in budgeted positions in the Annual Plan.

Statement of Financial Position as at 31 May 2023

	Notes	Actual 2023 11 month period	Actual 2022 12 month period	Variance	Annual plan 2023 12 month period
CURRENT ASSETS					
Cash and cash equivalents		27,963	13,243	14,720	2,049
Trade receivables		16,705	11,140	5,565	9,304
Other financial assets		24,661	23,434	1,227	36,796
Other current assets		1,463	883	580	698
TOTAL CURRENT ASSETS		**70,792**	**48,700**	**22,092**	**48,847**
NON- CURRENT ASSETS					
Property, plant and equipment		96,723	97,032	(309)	106,065
Investment property		16,795	16,795	-	16,810
Shares in subsidiary		700,290	700,290	-	657,795
Deferred tax asset		-	98	(98)	98
Related party loan- Port Otago Ltd		100,593	99,960	633	-
Intangible asset		937	1,450	(513)	3,982
TOTAL NON-CURRENT ASSETS		**915,337**	**915,625**	**(288)**	**784,750**
TOTAL ASSETS		**986,129**	**964,325**	**21,804**	**833,597**
CURRENT LIABILITIES					
Trade and other payables		(29,902)	(18,196)	(11,706)	(18,614)
Borrowings		(58,464)	(67,956)	9,492	-
Provision		-	-	-	-
Employee entitlement		(2,754)	(2,408)	(346)	(2,343)
TOTAL CURRENT LIABILITIES		**(91,120)**	**(88,560)**	**(2,560)**	**(20,957)**
NON CURRENT LIABILITIES					
Borrowings		(67,200)	(47,200)	(20,000)	(25,000)
Other financial instruments		-	-	-	-
TOTAL NON CURRENT LIABILITIES		**(67,200)**	**(47,200)**	**(20,000)**	**(25,000)**
NET ASSETS		**827,809**	**828,565**	**(756)**	**787,640**
EQUITY					
Reserves		725,244	723,546	1,698	666,120
Public Equity		102,565	105,019	(2,454)	121,520
TOTAL EQUITY AND RESERVES		**827,809**	**828,565**	**(756)**	**787,640**

The general subject of each matter to be considered while the public is excluded, the reason for passing this resolution in relation to each matter, and the specific grounds under section 48(1) of the Local Government Official Information and Meetings Act 1987 for the passing of this resolution are as follows:

General subject of each matter to be considered	Reason for passing this resolution in relation to each matter	Ground(s) under section 48(1) for the passing of this resolution
The Confidential Minutes of 24 May 2023	**Section 7(2)(a)** To protect the privacy of natural persons, including that of deceased natural persons	Subject to subsection (3), a local authority may by resolution exclude the public from the whole or any part of the proceedings of any meeting only on 1 or more of the following grounds: (a) that the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding would exist.
Iwi Representation to ORC Committees for 2023-2025	**Section 7(2)(a)** To protect the privacy of natural persons, including that of deceased natural persons –	Subject to subsection (3), a local authority may by resolution exclude the public from the whole or any part of the proceedings of any meeting only on 1 or more of the following grounds: (a) that the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding would exist.

This resolution is made in reliance on section 48(1)(a) of the Local Government Official Information and Meetings Act 1987 and the particular interest or interests protected by section 6 or section 7 of that Act or section 6 or section 7 or section 9 of the Official Information Act 1982, as the case may require, which would be prejudiced by the holding of the whole or the relevant part of the proceedings of the meeting in public.