Public and Active Transport Committee 9 August 2023

Meeting will be held in the Council Chamber at Level 2, Philip Laing House
144 Rattray Street, Dunedin
ORC Official YouTube Livestream

Members:
Cr Alexa Forbes (Co-Chair)	Cr Tim Mepham
Cr Andrew Noone (Co-Chair)	Cr Gretchen Robertson
Cr Gary Kelliher	Cr Bryan Scott
Cr Michael Laws	Cr Alan Somerville
Cr Kevin Malcolm	Cr Elliot Weir
Cr Lloyd McCall	Cr Kate Wilson

Senior Officer: Richard Saunders, Chief Executive

Meeting Support: Trudi McLaren, Governance Support Officer

09 August 2023 01:00 PM

Agenda Topic   Page

1.   WELCOME

2.   APOLOGIES

No apologies were submitted prior to publication of the agenda.

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 speak were made prior to publication of the agenda.

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. Councillor interests are published on the ORC website.

Public and Active Transport Committee
MINUTES

Minutes of an ordinary meeting of the Public Transport Committee held in the Council Chamber, Level 2 Philip Laing House, 144 Rattray Street, Dunedin on Wednesday 10 May 2023, commencing at 11:02 AM.

PRESENT

Cr Alexa Forbes   *(Co-Chairperson)*
Cr Andrew Noone   *(Co-Chairperson)*
Cr Gary Kelliher
Cr Michael Laws (online)
Cr Kevin Malcolm
Cr Lloyd McCall
Cr Gretchen Robertson
Cr Bryan Scott
Cr Alan Somerville
Cr Kate Wilson

1. WELCOME
Co-Chairperson Andrew Noone welcomed Councillors, members of the public and staff to the meeting at 11:02 am. 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), Amanda Vercoe (GM Governance, Culture and Customer), Liz Spector (Governance Support), and Kylie Darragh (Governance Support).

2. APOLOGIES
Resolution: Cr Noone Moved, Cr Somerville Seconded:
That the apologies for Cr Mepham, Cr Weir be accepted.
MOTION CARRIED

Cr McCall noted he would be leaving the meeting early to attend to other ORC business.

3. PUBLIC FORUM
Rachel Elder and Lindsay Dey representing the Dunedin Tracks Network Trust addressed the Committee under Public Forum about the trust's vision of a network of interconnected cycling and walking trails throughout Otago. Councillors asked questions and thanked them for attending the meeting.

4. CONFIRMATION OF AGENDA
The agenda was confirmed as published.

5. DECLARATIONS OF INTERESTS
No changes to the Councillor Declarations of Interests were noted.

6. CONFIRMATION OF MINUTES
Resolution: Cr Noone Moved, Cr Wilson Seconded
That the minutes of the 22 February 2023 Public and Active Transport Committee meeting be confirmed as a true and accurate record.
MOTION CARRIED

7. ACTIONS FROM RESOLUTIONS OF THE COMMITTEE
Open actions from resolutions of the Committee were reviewed.

8. MATTERS FOR CONSIDERATION
8.1. Public and Active Transport Operating Environment
This report was provided to summarise current transport policy and planning issues for committee members. Lorraine Cheyne (Manager Transport) and Doug Rodgers (Transport Contractor) were available to respond to questions about the report.

Following questions, the report was noted.

Resolution PAT23-106: Cr Wilson Moved, Cr Kelliher Seconded
That the Public and Active Transport Committee:
>   1)   ***Notes*** *this report.*
MOTION CARRIED

Cr Laws left the meeting at 11:33 am.
Cr McCall left the meeting at 11:30 am.

8.2. Public Transport Network Performance Report March 2023

This report updated the Committee on the year-to-date performance of its public transport network (bus and ferry), for the period from 1 January 2023 to 31 March 2023. Lorraine Cheyne (Manager Transport), Doug Rodgers (Transport Contractor) and Julian Phillips (Transport Implementation Lead) were available to respond to questions about the report.

Mr Rodgers noted an error in paragraph four of the report which stated patronage was down in Dunedin. The report should have read patronage was up in Dunedin.

Cr Wilson asked that future reports detail previous years' data for comparison. Mr Phillips stated he would accommodate that request. Following further questions and discussion, interim Chief Executive Pim Borren said staff recognise the opportunity for change and challenging KPIs should be set related to getting more public and active transport patrons. He noted the ORC will work more closely with the local Territorial Authorities on this as well. He urged Council to ensure the LTP is informed by this work.

Cr Robertson then moved:

Resolution PAT23-107: Cr Robertson Moved, Cr Wilson Seconded
That the Public and Active Transport Committee:
   1)   ***Notes*** *this report.*
MOTION CARRIED

Cr Scott left the meeting at 12:14 pm.
Cr Scott returned to the meeting at 12:16 pm.

8.3. Queenstown Public Transport Business Case Update

This report was provided to update the Committee the Queenstown Public Transport Business Case (QPTBC). It summarised work undertaken in the last three months, works anticipated in the next three months, and key risks for the project. Lorraine Cheyne (Manager Transport) and Doug Rodgers (Transport Contractor) were available to respond to questions about the report.

Following a discussion of the report, Cr Wilson moved that it be noted.

Resolution PAT23-108: Cr Wilson Moved, Cr Forbes Seconded
That the Committee:
   1)   ***Notes*** *this report.*
   2)   ***Notes*** *that public consultation on the Queenstown Public Transport Business Case will occur at a later stage of the Business Case.*
MOTION CARRIED

8.4. Fares and Frequency Business Case Bus Fare Survey Summary

This report was provided to inform the Committee on progress made in the Shaping Future Dunedin Fares and Frequency Business Case. The Connecting Dunedin initiative is a partnership between the ORC, Dunedin City Council, and Waka Kotahi NZTA formed to develop projects to inform transport needs in the city. Doug Rodgers (Transport Contractor), Lorraine Cheyne

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(Manager Transport) and Julian Phillips (Transport Implementation Lead) were present to respond to questions.

Mr Rodgers noted a public transport public survey which was launched in November 2022 and said 1795 responses were received. He also noted the stakeholder workshop was held on 8 March 2023 with Te Whatu Ora, University of Otago, Dunedin City Council, Waka Kotahi, Fisher and Paykel, and the Otago University Students' Association.

Following a discussion of the report, Cr Forbes moved that it be noted.

Resolution PAT23-109: Cr Forbes Moved, Cr Wilson Seconded
That the Public and Active Transport Committee:
   1)   *Notes* this report.
MOTION CARRIED

8.5. Regional Public and Active Transport Connectivity Strategy
This report was provided to outline a comprehensive approach to development of a regional public and active transport connectivity strategy, and to detail potential benefits and risks of that development. Lorraine Cheyne (Manager Transport) was available to respond to questions about the report.

Ms Cheyne noted that next steps in the development of the strategy included meeting with the local territorial authorities to get clarity on how they wanted to be involved, meeting with key stakeholders for support and a more in-depth scoping of the programme to include budget requirements and delivery timeline.

Cr Malcolm noted the report proposed bring the scoping strategy back to the Committee by 20 August 2023 and asked if the timeframe was achievable. Ms Cheyne said staff was working towards that date.

Following further discussion, Cr Malcolm moved the staff recommendation.

Resolution PAT23-110: Cr Malcolm Moved, Cr Wilson Seconded
That the Public and Active Transport Committee:
   1)   *Notes* this report.
   2)   *Recommends* that staff progress a staged approach to the development of a regional public and active transport connectivity and that further work is undertaken on scoping a strategy by 20 August 2023.
MOTION CARRIED

9. CLOSURE
There was no further business and Co-Chair Andrew Noone declared the meeting closed at 1:01 pm.

_____   _____
Chairperson   Date

Action Register

Search Criteria

Showing Completed Items: No

Applied Filters

Due Date Range: 30th Sep 2022 to 30th Sep 2025
Meeting Types: Public and Active Transport Committee

Generated By: Trudi McLaren
Generated On: 31/07/2023 at 3:21pm

Document	Item	Status	Action Required	Assignee/s	Action Taken	Due Date
Public and Active Transport Committee 2023.02.22	OPS2259 Public Transport Patronage report	Assigned	The CEO and Co-chairs of the Committee shall meet and develop strategic KPIs for public transport reporting, and present to Council for adoption with the Annual Plan 2023/24. **PAT23-101**	Councillor, Councillor, General Manager Transport		30/06/2023
Public and Active Transport Committee 2023.05.10	PPT2301 Regional Public and Active Transport Connectivity Strategy	In Progress	Staff progress a staged approach to the development of a regional public and active transport connectivity and that further work is undertaken on scoping a strategy by 20 August 2023.	Manager Transport		20/08/2023

8.1. Public & Active Transport Operating Environment

Prepared for:	Public & Active Transport Committee
Report No.	OPS2328
Activity:	Transport Operating Environment
Author:	Lorraine Cheyne, Manager Transport
Endorsed by:	Pim Borren, General Manager Transport
Date:	9 August 2023

PURPOSE

[1] The purpose of this report is to highlight and/or summarise recent government initiatives including legislative and policy updates impacting the transport operating environment. The report also updates the Committee on recent and upcoming public and active transport planning activities.

EXECUTIVE SUMMARY

[2] Key legislative and policy changes impacting on the public and active transport operating environment in the last quarter include:
- Government Policy Statement on Transport (GPS) Update
- Regional Speed Management & the Land Transport (Road Safety) Amendment Bill
- Vehicle Exhaust Emissions Amendment Rule

[3] Activities in the operating environment that are of particular interest to the general public or to special interest groups include:
- End of Government 50% Public Transport Subsidy and Community Connect extension.
- Updates from the Joint Otago Southland Regional Transport Commitee
- Update on the South Island Regional Transport Committee Chairs Group
- Minor changes to Route 5 – Lake Hayes to Queenstown

[4] In addition, the trial Mosgiel Express service is scheduled to begin on 4 September.

RECOMMENDATION

That the Committee:
1) ***Notes*** this report.

DISCUSSION

[5] **Government Policy Statement on Transport (GPS)** - The GPS sets the government's priorities for land transport investment over the next 10-year period. It also sets out how money from the National Land Transport Fund (NLTF) is spent on activities such as public transport, state highways, local roads, and road safety. The Government had intended to commence public consultation on the draft GPS in June, however the

release of the draft GPS has been delayed with no indication of when the draft GPS will be released.

[6]   Under the Land Transport Management Act 2003 (LTMA), a regional transport committee (RTC) must be satisfied that the Regional Land Transport Plan (RLTP) is consistent with the GPS. In accordance with the Waka Kotahi guidance the Otago Regional Council and Environment Southland are expecting to consult on a reviewed joint RLTP in November. Without guidance from the new GPS, the RLTP needs to remain consistent with the current GPS 2021. However, the GPS 2021 predates the release of the Emissions Reduction Plan, 2022, and other Crown appropriations for climate change emergency relief and transport choice funding that are now available,.

[7]   The uncertainty regarding funding and resourcing constraints that we face as we head into the 2024-27 National Land Transport Programme is acknowledged, but time-lines remain unchanged. Waka Kotahi is asking Approved Organisations to put forward all necessary planned activities "agnostic" (regardless of funding source, affordability or sector capacity to deliver) over a 6-10 year horizon for inclusion in the RLTP.

[8]   **Regional Speed Management** – an important factor influencing the uptake of walking and cycling is the safety when active modes share the road space with vehicles. Safe and survivable vehicle speeds are a key component of improving both real and perceived safety for pedestrians and cyclists. The Land Transport Rule: Setting of Speed Limits 2022 requiring Road Controlling Authorities (RCAs) and the Regional Transport Committee to prepare a Regional Speed Management Plan (RSMP) to establish a 10-year vision and three-year action plan to implement safe and appropriate speed limits and associated speed management activities. Otago and Southland had prepared a draft RSMP that Territorial Authorities (TAs) are using as the basis of their plans. At this stage no TA has indicated that they won't meet the timeframe for the RSMP to be finalised, 5 October 2023.

[9]   Aligned to this, submissions to the Justice Committee have recently closed on the Land Transport (Road Safety) Amendment Bill. The Bill's purpose is to respond to unsafe behaviour on New Zealand's roads. It proposes to enable the New Zealand Police and Waka Kotahi NZ Transport Agency to detect inappropriate behaviour on the road and carry out enforcement activities. Changes proposed by the bill include:
- Increasing the period that a vehicle can be impounded for if a driver fails to stop and remain stopped
- Enabling the Police to seize and impound a vehicle if a driver or registered person fails to give information about a fleeing driver offence (and impounding the vehicle is necessary to prevent a threat to road safety)
- Increasing the period of licence disqualification after a second conviction for an offence of failing to stop or remaining stopped, and creating a new sentencing option for the courts to order that a vehicle be forfeited on conviction for failing to stop or to remain stopped

- Providing for the electronic service of notices
- Ensuring that point-to-point safety cameras can be used as an enforcement tool for speeding offences
- Providing for the automated issuing of certain infringement notices

[10]   ORC did not make a submission on the proposed Amendment Bill.

[11]   **Vehicle Exhaust Emissions Amendment Rule** - The Ministry of Transport is currently consulting on a proposed Amendment Rule, which aims to progressively improve the harmful emissions standard of vehicles entering Aotearoa New Zealand by requiring newly imported vehicles to meet a new stricter emissions standard. Consultation feedback closed on 22 June 2022. ORC did not make a submission on the proposed Amendment.

[12]   Activities in the operating environment that are brought to the Committee's attention include:

[13]   **End of Government 50% Public Transport Subsidy, as of 1 July** – Members will be aware that the unilateral government subsidisation of half price fares ended on I July 2023, but also that as part of Budget 23, Government extended its Community Connect initiative to include age-based concessions for under 13s (Free) and 13 to 24 year-olds (half-price). The Regional Integrated Ticketing System (RITS) group including ORC moved quickly to implement the Community Connect extension in the six weeks after the budget announcement and 1 July. ORC's approach to implementation was reported to full Council at its meeting on 28 June 2023. As part of the implementation, Council endorsed making free Bee Cards available for a period of 3 months.

[14]   Issuing of Bee Cards in the two weeks post 1 July is marginally higher than in the two weeks prior to I July, which was a period of higher than normal sales, due to the roll out of Community Connect. In the first two weeks of July, 2952 cards given out since to 14 July, cf some 2,760 cards in the two weeks prior to 1 July. Around 7% (214) of cards issued since 1 July have a negative balance, and of those 5 cards have a negative balance of $4.00 and 55 had a balance of $3.00. This continued high, but modest increase, along with the majority negative balance being less than an unregistered single use trip fares, indicates a responsible uptake of free cards, at this stage.

[15]   ORC moved quickly, with the RITS group to implement the Community Connect extension on 1 July. Originally the RITS group agreed that Community Connect concessions would apply to "stored value" trips. Stored value trips are when a passenger travels with another passenger who charges the fare to his or her Bee Card. Subsequently all regions experienced some unintended consequence of the decision on stored value. The manifestation of not applying concessions to stored value trips on the Otago networks was that the fare price for Card Youth Stored Value trips defaults to a cash fare, which is $3.00 (Dunedin) or $4.00 (Queenstown).

[16]   Staff have since amended the fares tariff policy to remove this unintended disincentive for Bee Card using youth to bring friends with them on bus trips, and potentially for groups of youths to choose to use buses to travel to social and recreational activities. Students with Bee Cards paying for friends who are infrequent bus users, have forgotten

their own Bee Cards, or have Bee Cards with low balances will now pay a 100% youth fare of $1.20 (Dunedin) or $1.50 (Queenstown).

[17] **Regional Transport Committee Update** – The Regional Transport Committees (RTC) for Southland and Otago have been meeting jointly since 2018. Chairmanship of the meetings is rotated between the two RTC Chairs, Cr Wilson (ORC) and Cr McPhail (ES). Decisions are made jointly unless requiring a specific resolution form one or other of the RTCs. This arrangement supports wholistic discussions and a joined-up approach to the development of implementation of the Regional Land Transport Plans.

[18] The joint RTC has met twice this year in March and July, and it will meet again on 4 August. The primary function of a RTC is to prepare the Regional Land Transport Plan on behalf of the Regional Council. RLTPs are prepared on a six yearly cycle and have a requirement for a mid-term review. The current Otago-Southland RLTP was adopted by the respective Councils in June 2021 for the period through to 2027. The RLTP is due for the mid-term review to be completed by April 2024.

[19] The RLTP includes two separate sections. The front section sets the strategic direction for the Plan. The second section includes funding requests from the Regions' Approved Organisations (AOs) for funding from the National Land Transport Fund (NLTF) administered by Waka Kotahi. For funding to be obtained from the NLTF details of the projects must be included in an RLTP.A full memorandum of the recent Joint RTC activities is provided in Attachment 1.

[20] **Update on the South Island Regional Transport Committee Chairs Forum (SI RTC)** – The SI RTC Chairs Forum, Chaired by Councillor Wilson, has met on 13 March and 18 July this year. The meeting on 13 March was the first of the triennium. The Forum was given briefings from staff on the role of the Forum; and a recap on the joint RLTP statement of the Forum members. Gary Ikin, South Island Infrastructure Manager (KiwiRail), who spoke to KiwiRail's upcoming work programme and priorities in 2023 – 2025 and the issues they face. It was noted how better funding through the Rail Network Investment Programme (RNIP) has allowed KiwiRail to do their work more economically.

[21] At a workshop in the afternoon the Forum provided direction for staff on the shared issues facing transport across the South Island which identified key themes (and relative importance) for the Forum. Those themes were:
- Resilience – responding and adapting to natural hazard risks and climate change.
- Need for a long-term view of transport outcomes and decision-making.
- Equitable, future-focused transport system funding and financing.
- Collective advocacy, leadership, and facilitation of collaborative discussions on the future of transport.

[22] Freight and passenger transport issues (including tourism) were also identified, but not as prominently.

[23] At its meeting on 18 July the Forum agreed a priority work programme initiatives based on the 13 July workshop and have now requested staff to development of agreed work programme initiatives. The agreed funding share between partner councils to deliver the Chairs work programme, is 20% of the Forum operational budget (being $20,000) and of project costs.

[24]   The Forum also received reports from:
- Mark Gordon and Martyn Wooster from the Canterbury Lifeline Utilities Group delivered a presentation on the work being done identifying priority routes in preparation for an AF8 earthquake sequence
- Emma Bickerstaffe and Ryan Walsh from the Department of Prime Minister and Cabinet on the work to enhance the resilience of New Zealand's critical infrastructure
- Environment Canterbury on the Canterbury Civil Defence Emergency Management (CDEM) Roading Project.

[25]   **Extension of Route 5 Lakes Hayes to Queenstown -**   Extension of Route 5 at Lake Hayes Estate in Queenstown that was agreed in 2020, at a cost of $151,285.80 +GST, (indexed $187,529.90 +GST). However, the extension was never implemented due to COVID operational factors including reduced time-table and on-going driver shortages. Despite this, in preparation for the route extension, bus stops and shelters along the route have been constructed and in place for some sixteen months.

[26]   With the arrival of a full complement of bus drivers in Queenstown, Route 5 can now begin to service the Lake Hayes extension. This route change will take effect as of 4 September.

[27]   In Dunedin, the trial Mosgiel Express Service will come into operation on 4 September 2023. This RLTP 2021- 2024 LCLR activity has also not previously operated due to COVID operational factors including reduced patronage, time-tables and on-going driver shortages. Named Route 78a (morning) and 78b (evening) will operate on half-hourly at peak on weekdays, as follows:

Mosgiel Terminus	Mosgiel Clocktower	Hub Stand F
7:15	7:18	7:45
7:45	7:48	8:15
8:15	8:18	8:45

Hub Stand F	Gordon Rd, Glasgow St Busbay	Mosgiel Terminus
15:30	15:54	16:00
16:00	16:24	16:30
16:30	16:54	17:00
17:00	17:24	17:30
17:30	17:54	18:00
18:00	18:24	18:30

CONSIDERATIONS

Strategic Framework and Policy Considerations

[28]   Future investment in public transport planning, procurement and service provision will need to be consistent with the aims and objectives of new legislation, including Transport Rules, as passed into law and/or set.

[29]   Council's key transport funding policy and investment plans will be amended and adapted to respond to the changes in the transport operating environment as and when appropriate. Those documents being the

- Regional Land Transport Plan (RLTP);
- Regional Public Transport Plan (RPTP); and
- Long Term Plan (LTP).

Financial Considerations

[30]   The cost of the of the variation of the Queenstown Route 5 and consequential adjustments was cost of all changes is $151,285.80 +GST, (indexed $187,529.90 +GST) per year (51% contribution from Waka Kotahi) and is within the approved operating budget.

[31]   The cost of the Mosgiel Express service is approximately $800,241.18 for 2023/24. This was approved for years 1 – 3 of the RLTP/LTP 2021. As the service was unable to operate 2021 – 2023, the Waka Kotahi share for the Trial is now only confirmed for 2023/24. If successful, continuation of the service will be secured by inclusion in the contract for Unit 5 currently being prepared for retendering.

Significance and Engagement

[32]   Not applicable, this report is for noting.

Legislative and Risk Considerations

[33]   The legislative changes discussed in this report do not directly impact on Council's regional transport functions.

Climate Change Considerations

[34]   There are no direct climate change impacts.

Communications Considerations

[35]   Not applicable, this report is for noting

NEXT STEPS

[36]   Further updates to the Committee on developments.

ATTACHMENTS

Joint Otago Southland Regional Land Transport Committee Update

Purpose

The purpose of this report is to brief the Committee on the recent activities of the Combined Otago and Southland Regional Transport Committees. Key items from the Regional Transport Committee meetings or Workshops are highlighted.

Background

The Regional Transport Committees for Southland and Otago have been meeting jointly since 2018. Chairman ship of the meetings is rotated between the two RTC Chairs by agreement. Decisions are made jointly unless requiring a specific resolution form one or other of the RTCs. This arrangement has resulted in more wholistic discussions and a joined-up approach to the development of implementation of the Regional Land Transport Plans required by the Land Transport Management Act.

The model being used is fully supported by Waka Kotahi and has been used as an example of good practice by Waka Kotahi for other Regions.

This report summarises the recent activities of the joined committees.

Current situation

The primary function of a Regional Transport Committee is to prepare the Regional Land Transport Plan on behalf of the Regional Council. Regional Land Transport Plans are prepared on a six yearly cycle and have a requirement for a mid-term review. The current Otago Southland Regional Land Transport Plan (RLTP) was adopted by the respective Councils in June 2021 for the period through to 2027. The Plan is therefor due for the mid-term review to be completed by April 2024.

The RLTP includes two separate sections. The front section sets the strategic direction for the Plan and the second section includes funding requests from the Regions Approved Organisations (AOs) for funding from the National Land Transport Fund (NLTF) administered by Waka Kotahi. For funding to be obtained from the NLTF details of the projects must be included in an RLTP.
The strategic section review of the combined Plan is well underway with the funding and projects section due to commence in September when funding requests must be available from the regions AOs

The joint RTCs have had a number of meetings or workshops as part of the mid-term RLTP review. Main items from each of the workshops or meetings are set out below.

Initial Meeting 3 March 2023 – Agenda Item Comments

Item 1 - Induction Briefing Otago Southland Regional Transport Committees

The Southland RTC has a number of new representatives from the respective member organisations. In Otago there was only a single change. At the initial meeting, some time was spent on briefing the new representatives on the role and responsibilities and limitations of a Regional Transport Committee as set out in the Land Transport Management Act.

Item 2 – Review of Combined RTC Terms of Reference

The current Terms of Reference for the Committees were reviewed and members request updates to the Terms of Reference be made to reflect the new requirements for RTCs to prepare Regional Speed

Management Plans. Each Road Controlling Authority is in the process of preparing their own Speed Management Plan that will be incorporated into the Regional Plan following consultation. The Regional Plan is to be completed by April 2024.

Item 3 – Mid-Term Review of the 2021-2031 Regional Land Transport Plan

Progress on the mid-term review of the 2021/27 Regional Land Transport Plan was reported on. The main items being included in the review are

1. Review and update of the Problem Statements, Responses and Polices to reflect
    a. The requirements of the various climate response actions from the Government
    b. Potential vehicle kilometres travelled (VKT) reduction targets
    c. Options for mode choice for the community
2. Update the measures that the Plan will be monitored against based on the latest measure available.
3. The Committees noted that the RLTP is a land transport plan and not just a road transport plan.
4. Update to the Funding and Projects section of the RLTP to reflect the Government Policy Statement on Land Transport (GPS) and potential different funding streams that may become available to cover the shortfall in funding from the National Land Transport Fund. This work is on hold until the GPS is released by the Government.

Item 4 – Request for External Membership on the Regional Transport Committees

A request had been received from Transporting New Zealand for membership of the Committees. The current legislation does not provide for such membership but the Committees welcome Transporting NZ input as advisors particularly through the Regional Technical Advisory Group (TAG).

Item 5 – Waka Kotahi NZ Transport Agency Update

Waka Kotahi updated the Committees on a number of items including
- Maintenance and operations on State highways in the South Island Programme is on-track and contractors have benefited from the dry conditions in the South.
- The Interim SH Speed Management Plan is being developed, with the focus on stage speed reduction at schools, marae, and high-risk areas.
- One Network framework (ONF) to replace One Network Classification
- Beaumont bridge: Excellent progress with only minor traffic management issues on weekends.

Workshop 3 March 2023 – Agenda Item Comments

Following the initial meeting of the Regional Transport Committees a workshop was held to reconfirm the outcomes from the final meeting of the 2018/21 RTCs where the Problem Statements and Outcomes to be incorporated in the RLTP review were discussed.

The session was facilitated by Eric Barnes and the outcomes and changes were then incorporated into the mid-term review draft of the Regional Land Transport Plan. As a result of the workshop the problem statements and responses became more focused particularly around the need for maintaining the existing network and responding to the challenges of climate response.

Regional Transport Committee Meeting 12 May 2023 – Agenda Item Comments

Item 1 – Regional land Transport Plan Mid-term Review – Draft Strategic Section

An initial draft of the proposed amendments to the strategic section of the Regional Land Transport Plan was presented to the Committees for comment and input.

Items raised in the discussion included:
- reverting back to the previous version of the ILM problem statement (version 1.3);
- the explanation for the review needed to be clearly outlined;
- the differences between urban and rural areas needs greater emphasis;
- change language to focus on commuter travel not car travel;
- incorporate future population projections and plan for the future (table 2);
- greater focus on innovative transport options;
- incorporate relevant safety statistics;
- change table 3
- references to "Tarras" changed and Figure 1 to be replaced;
- annexures need to be updated (2 & 8) by RCAs
- the issue of an aging population demographic and lack of transport options is smaller centre and rural areas was noted.

Item 2 –Waka Kotahi NZ Transport Agency Update

Waka Kotahi updated the Committees on a number of items including
- VKT reduction targets for Tier 1's;
- VKT reduction prioritisation and funding;
- speed zones, schools;
- preparations for programmes.

Cr Jim O'Malley raised concerns that there is potentially insufficient priority provided through the tier system for appropriate VKT reduction, while Cr Quentin Smith reiterated the importance of alignment with LTP programmes. Cr Kate Wilson raised concerns about speed reductions not occurring around hospitals.

Item 3 – Arataki – Waka Kotahi Presentation

This item was presented by Mr Chris Ballentyne, who is the Lead Strategic Planner, for most of the South Island which includes Otago and Southland. He is currently involved in a national project "Arataki" and was keen for local government to be more involved.

Arataki is Waka Kotahi's view of what will be required of the transport network in the next 30 years. It has been developed solely by Waka Kotahi without reference to the various Regional Councils, Regional Transport Committees, or other Approved Organisations.

The latest version was released at the end of March 2023 and has a number of components,
- strategic context;
- national directions
- regional directions;
- transport modes and strategic network;
- user lenses;

- interactive maps (represented in a GIS format).

Item 4 – Otago Southland Road Safety Update

This item provided an update to the Combined Otago Southland Regional Transport Committees on the management of Road safety programmes and current statistics related deaths and serious injuries on the Regions roads.

At the end of April, the Ministry of Transport records showed the following details regarding deaths on the Regions Roads for 2023 year to date.

2023 YTD	Total	Drivers	Passengers	SH 100 kph	SH 80 kph	SH 70 kph	SH 50 kph	LR 100 kph
Otago	7	5	1	3	0	1	1	2
Southland	6	3	3	2	1	0	0	3

Serious injury figures are not available.

The committees asked for the data to be further explored insights brought back to a future meeting. A report on the influence of freight movements around the Regions was also requested to see if there is a corelation between safety and freight movements.

Item 5 – Regional Speed Management Plan Update

This report provided the Combined Otago Southland Regional Transport Committees with the latest information available and progress on the development of the combined regions Regional Speed Management Plan.

The Regions Road Controlling Authorities are in the process of developing and consulting on their Speed Management Plans. The draft Regional Speed Management Plan has been approved by the Regional Transport Committees early in the process to guide the RCA plans. The Regional Plan will incorporate the various RCA Plans once they have been consulted on.

The process is on track for completion to meet the Waka Kotahi set timeframes.

The next meeting of the Combined Otago and Southland Regional Transport Committees is scheduled for the 4 August 2023 in Alexandra.

8.2. Joint Public & Active Transport Committee Advisory Groups

Prepared for:	Public and Active Transport Comm
Report No.	OPS2334
Activity:	Transport Governance
Author:	Pim Borren, General Manager, Transport
Endorsed by:	Richard Saunders, CE
Date:	9 August 2023

PURPOSE

[1]   Background and update on Public and Active Transport Advisory Groups (PTAG).

EXECUTIVE SUMMARY

[2]   There have been three PATAG meetings to date (two with Dunedin City Council (DCC) and one with Queenstown Lakes District Council (QLDC). They have been collegial, positive, and constructive.

[3]   The main purpose of PATAG meetings is to improve the relationship between Otago Regional Council (ORC) and each of our TLA partners through coming together and providing a better understanding of the challenges faced by each in supporting our goals and commitment towards increasing public and active transport and achieving common mode shift targets.

RECOMMENDATION

That the Committee:
  1) **Notes** this report.

BACKGROUND

[4]   Public Transport had a tumultuous year in 2022. While the issues related to driver shortage and subsequent reduced timetables was a national problem, ORC faced public criticism from each of our TLA partners (DCC, QLDC).

[5]   For the new triennium ORC was determined to do a better job in working in partnership with both DCC and QLDC. At the same time ORC recognised the need to improve its own governance of public and active transport, not least because the cost of provision makes up almost one-third of ORC's annual budget.

[6]   As a result, ORC established a new committee of Council for the first time focused solely on public and active transport (PAT). Furthermore, two advisory groups were established in partnership with each TLA to ensure governors of each partner council would have an opportunity of supporting the direction and recommendations in areas complementary to achieving our shared objectives for PAT.

DISCUSSION

[7]   There have now been three meetings (two with DCC and one with QLDC) at governance level. While these have been initial meetings to help establish the expectations and

[ ]   visions for PAT of each party, it should be noted that all of the meetings have been collegial, positive, and constructive.

[8]   By ORC sharing some of our challenges around addressing PAT and our partners sharing their own (concerns and challenges), a much better common understanding is being fostered.

[9]   The other objective is to allow each advisory group the opportunity of feeding back on directions for each other's Council to consider when considering decisions around investment in PAT. In the case of each TLA, their investment is largely through capital works which allow PAT to operate more effectively (eg bus stops, bus lanes etc). In the case of ORC we contribute the actual service provision of passenger (public) transport.

[10]   Importantly the advisory groups have been in agreement in the commitment to increasing mode shift toward PAT. It has been helpful therefore, that ORC has been able to report significant growth in patronage in the year to date (probably the most successful of any network nationally).

[11]   We need to acknowledge that there are a range of parameters which contribute to patronage growth: low fares, car parking availability/price, fuel and car maintenance costs, current cost of living pressures, congestion, more people choosing to work from home, tourism growth etc. If the two partners are able to collaborate and coordinate better within each area of responsibility, then we have the potential of driving numbers up even further (ie usage of PAT).

OPTIONS
[12]   No options for consideration.

CONSIDERATIONS

Strategic Framework and Policy Considerations
[13]   In the case of ORC/DCC, a commitment to deliver on the target of doubling commuter uptake of PAT (from 4% to 8%) to work or study. In the case of ORC/QLDC the focus is on reducing car congestion issues (especially in CBD, Frankton Rd, Ladies mile, BP roundabout).

Financial Considerations
[14]   Both TLAs have constrained capital works' budget for the upcoming LTPs.

[15]   Waka Kotahi (WK) is also facing spending constraints around capital given the issues faced in the NI. Dunedin and Queenstown are defined as Tier 2 centres (for WK investment).

Significance and Engagement
[16]   LTP decisions to be made for all three councils will require full consultation where there will be increases in investment proposed (ie to achieve growth targets).

Legislative and Risk Considerations
[17]   There is uncertainty around the GPS for transport which is yet to be released. Therefore, uncertainty in terms of central government priorities and/or resourcing.

Climate Change Considerations

[18]   All three councils are committed to decarbonisation. PAT will be helpful eg full decarbonisation of our bus fleet by 2029.

Communications Considerations

[19]   None for this report.

NEXT STEPS

[20]   Ongoing monitoring of progress in achieving joined up goals and targets.

[21]   Acknowledgement of the support especially from the ORC Manager Transport, and her team in providing such good updates on network performance and updates on key business cases for each group meeting. These will be ongoing and reciprocated by each TLA partner.

ATTACHMENTS

The notes/minutes (albeit informal) from each PATAG meeting are not attached but are available for councillors on request.

8.3. Queenstown and Dunedin 2022/23 Full Year Patronage Report

Prepared for:	Public and Active Transport Comm
Report No.	OPS2330
Activity:	Transport: Public Passenger Transport
Author:	Julian Phillips, Implementation Lead Transport Gemma Wilson, Senior Transport Operations Analyst
Endorsed by:	Pim Borren, General Manager Transport
Date:	9th August 2023

PURPOSE

[1]   To update the Committee on the performance of its Public Transport (bus and ferry) and Total Mobility services, for the full Financial Year, 1 July 2022 to 30 June 2023.

EXECUTIVE SUMMARY

[2]   Dunedin bus patronage for 2022/23 is 2,797,300, an 18% increase from 2021/22.

[3]   Queenstown bus patronage for 2022/23 is 1,252,982, a 55% increase from 2021/22.

[4]   Total patronage across both bus networks is 4,050,282. **This is an increase of 1% on the previous highest year, which was 4,016,387 in 2018/19.** This is the second instance of combined patronage exceeding 4 million trips.

[5]   Queenstown ferry patronage for 2022/23 is 104,240, a 74% increase from 2021/22.

[6]   Total Mobility patronage for 2022/23 is 109,358, a 22% increase from 2021/22.

[7]   Total patronage across all public transport options in Otago is 28% higher than 2021/22:

2022/23	Mode	2021/22
4,050,282	Bus	3,173,919
109,358	Total Mobility	89,638
104,240	Ferry	60,054
4,263,880	TOTAL	3,323,611

+28%

RECOMMENDATION

That the Committee:
   1) ***Notes*** *this report.*

DISCUSSION - DUNEDIN

[8]   Figure 1 details patronage and revenue for the 2022/23 financial year.

Dunedin Public Transport Report

June 2023

Figure 1: Dunedin 2022/23 Patronage and Revenue
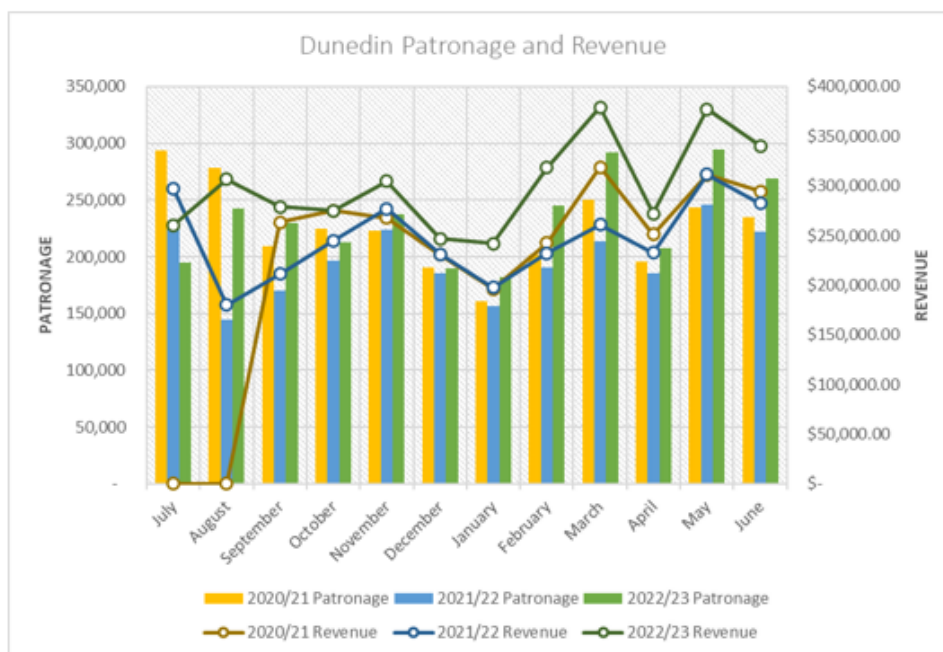
Dunedin	July	August	Septembe	October	November	December	January	February	March	April	May	June	Totals
2018/19 Patronage	195,272	235,930	221,438	212,965	223,894	177,520	172,142	213,992	246,316	198,745	245,477	204,362	2,548,330
2019/20 Patronage	220,652	235,666	230,329	224,285	226,692	182,910	181,525	228,477	175,526	26,802	68,709	197,681	2,199,254
2020/21 Patronage	293,294	278,162	209,278	224,799	223,263	190,821	160,848	201,611	250,266	195,795	243,550	234,783	2,706,470
2021/22 Patronage	231,082	144,505	170,397	196,538	223,952	185,219	156,857	190,746	213,639	185,831	246,438	221,895	2,367,099
2022/23 Patronage	194,544	242,825	229,954	213,011	237,385	189,812	181,899	244,977	291,825	208,030	294,188	268,850	2,797,300

[9]   Total Dunedin bus patronage for 2022/23 is 2,797,300.

[10]   This is an 18% increase from 2021/22 and a 10% increase from the 2018/19 financial year, which is the last full year period where patronage was not disrupted by COVID restrictions and driver shortages.

[11]   Full timetables were re-introduced to Dunedin in February 2023. For the 7 months to end-January 2023, Dunedin patronage was 3% higher than the corresponding period in 2018/19.

[12]   From the introduction of full timetables in February, to end June 2023, this increased to 18% higher than 2018/19. While this suggests reliability and frequency of services is increasing patronage, it is noted that the 50% unilateral government subsidy of fares applied throughout FY 2022/2023 as well.

[13]   Bee Card fares make up 92% of transactions, with 57% of card transactions being Adult, 24% being Child and 11% being Supergold.

[14]   Future reports will provide detail on the newly introduced ticketing concessions such as Community Services.

[15]   In summary, Dunedin patronage has more than recovered from the past couple of years of disruption. Patronage across the network is now exceeding the previous 6 years, but noting that the 50% unilateral government subsidy of fares applied throughout the whole of FY 2022/2023.

[16]   Figure 2 provides individual PTOM Unit information.

[17]   All Units have experienced patronage increases, with Units 2, 4 and 5 notable for particularly high increases of 34%, 26% and 19% respectively.

Unit 1	Unit 2	Unit 3	Unit 4	Unit 5
• Balaclava • Logan Park • Concord • Port Chalmers • Northern services • Peninsula	• St Clair • Normanby • Corstorphine • Wakari • St Clair Park • Helensburgh	• Pine Hill • Lookout Point • Shiel Hill • Opoho • Ridge Runner	• Brockville/Half. Bush/St Kilda • Waverley • Ocean Grove • Ross Creek • Belleknowes • Kenmure	• Mosgiel • Mosgiel Loop • Abbotsford

Unit 1 Revenue June 2023
$54652
▲ 9% vs June 2022

Unit 1 Patronage
43600
▲ 11% vs June 2022

Unit 2 Revenue June 2023
$102,999
▲ 33% vs June 2022

Unit 2 Patronage
80,022
▲ 34% vs June 2022

Unit 3 Revenue June 2023
$61,058
▲ 8% vs June 2022

Unit 3 Patronage
45,787
▲ 9% vs June 2022

Unit 4 Revenue June 2023
$83,330
▲ 25% vs June 2022

Unit 4 Patronage
66,485
▲ 26% vs June 2022

Unit 5 Revenue June 2023
$38,102
▲ 20% vs June 2022

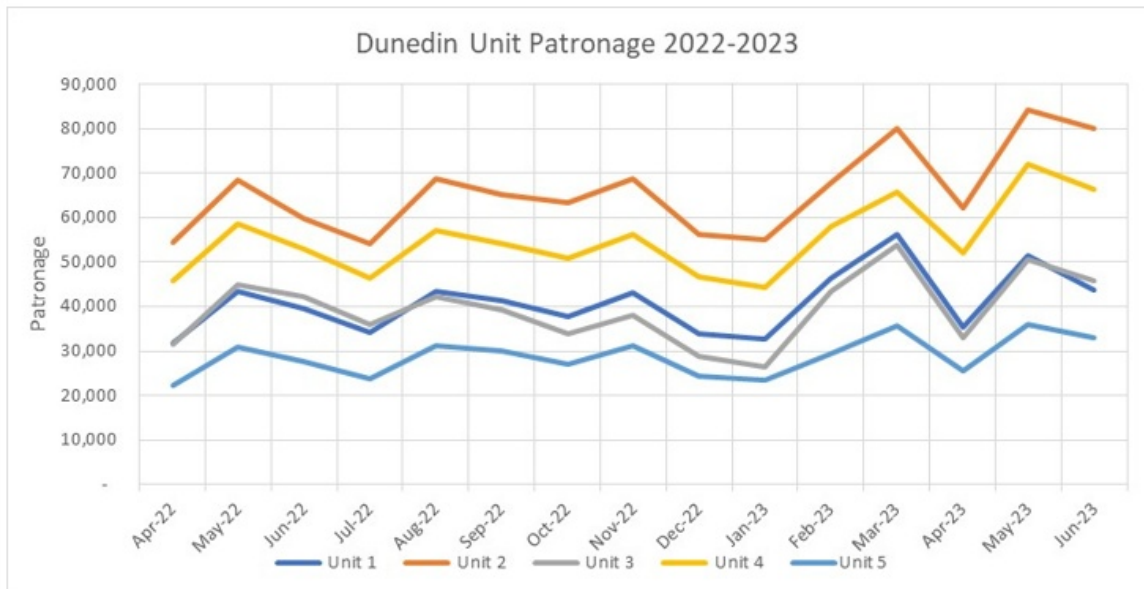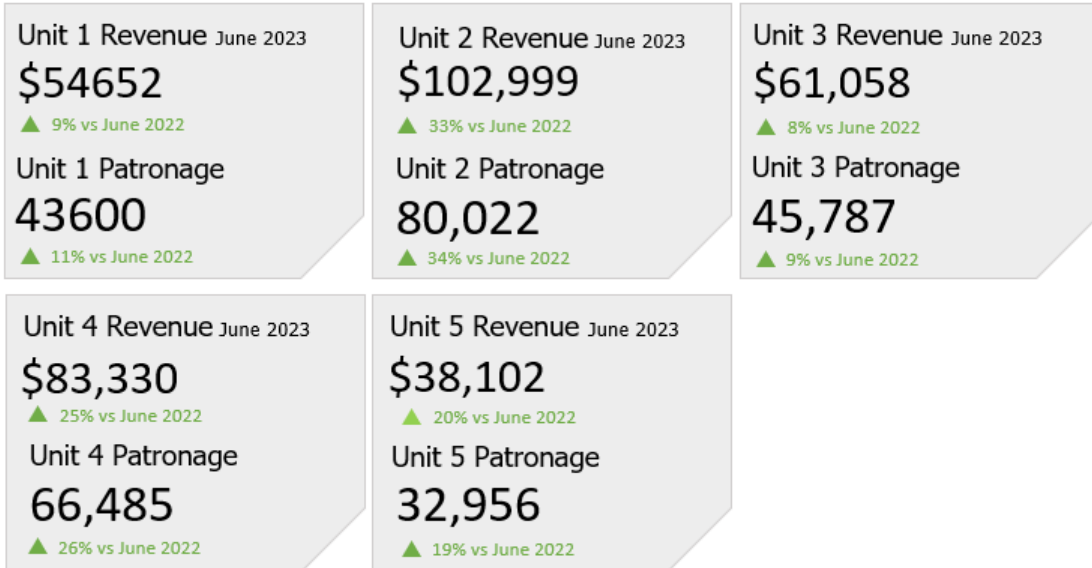Unit 5 Patronage
32,956
▲ 19% vs June 2022

Figure 2: Dunedin 2022/23 PTOM Unit performance

DISCUSSION - QUEENSTOWN

[18]   Figure 3 details patronage and revenue for the 2022/23 financial year.

Figure 3: Queenstown 2022/23 Patronage and Revenue
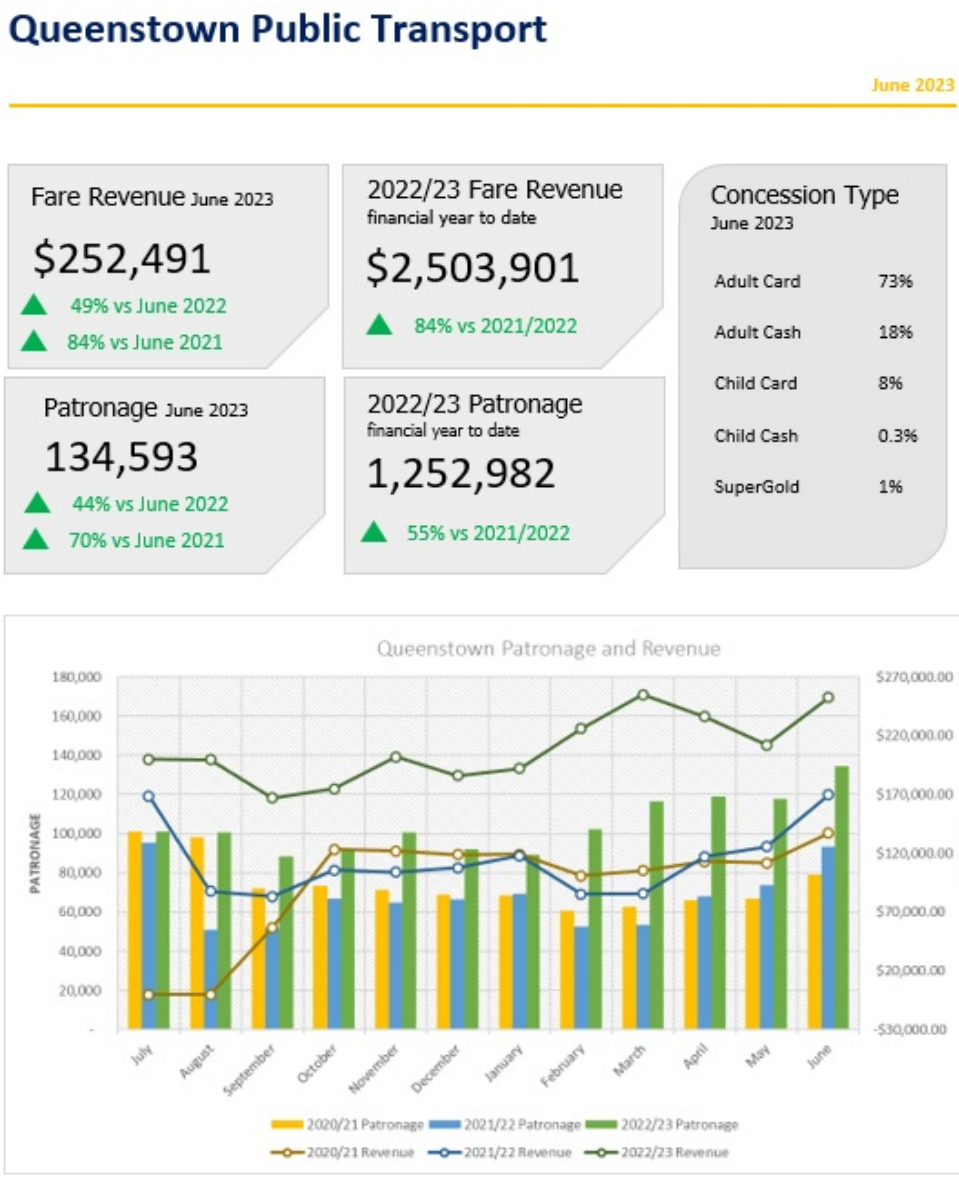
Queenstown	July	August	Septembe	October	November	December	January	February	March	April	May	June	Totals
2018/19 Patronage	122,752	117,442	103,974	111,657	125,600	118,997	136,055	129,439	134,084	125,244	118,077	124,736	**1,468,057**
2019/20 Patronage	136,766	129,011	121,416	120,662	128,440	128,282	136,985	131,102	90,746	9,919	42,577	73,597	**1,249,503**
2020/21 Patronage	100,951	98,102	72,143	73,385	71,464	69,096	68,550	60,717	62,613	65,928	66,863	79,251	**889,063**
2021/22 Patronage	95,248	51,010	51,987	66,690	64,895	66,507	69,147	52,471	53,524	68,158	73,786	93,367	**806,820**
2022/23 Patronage	100,966	100,668	88,268	91,277	100,579	91,940	89,306	102,118	116,667	118,955	117,645	134,593	**1,252,982**

[19]   Total Queenstown bus patronage for 2022/23 is 1,252,982.

[20]   This is a 55% increase from 2021/22, and a 15% decrease from the 2018/19 financial year, which is the last full year period where patronage was not disrupted by COVID restrictions and driver shortages.

[21]   Full timetables were re-introduced to Queenstown in June 2023. For the 11 months from July 2022 to end May 2023, Queenstown patronage did not exceed 2018/19 levels.

[22]   June 2023 data was 7% higher than the corresponding 2018/19 period, marking the first time in 2022/23 that patronage exceeded pre-COVID levels and an indicator of the effect of the reintroduction of full service levels.

[23]   Bee Card fares make up 82% of transactions, 10 % less than Dunedin. 73% of card transactions are Adult, 8% Child and 1% being Supergold.

[24]   Future reports will provide detail on the newly introduced ticketing concessions such as Community Services.

[25]   In summary, Queenstown is recovering strongly and has posted a significant increase in patronage versus the previous financial year. However, whilst it remains 15% below the pre-COVID/driver shortage period of 2018/19, it should be noted that the operation of full timetables only returned to Queenstown on 1st June 2023, and the removal of border restrictions also took place within this financial year. Tourism represents a significant proportion of patronage in Queenstown and patronage will likely fully recover in line with it.

[26]   Figure 4 provides individual PTOM Unit information.

[27]   Both Units 6 and 7 have increased in patronage by 41% and 55% respectively.

[28]   Unit 7, whilst much lower in terms of total patronage than Unit 6, is showing a trend of strong patronage growth, especially in 2023 and with a notable uptick in June 2023.

Unit 6
- Fernhill – Remarkables Park
- Jacks Point – Frankton Hub
- Lake Hayes - Queenstown

Unit 7
- Arthurs Point – Arrowtown
- Kelvin Heights – Frankton Flats

Unit 6 Revenue June 2023

$198,804

▲ 46% vs June 2022

Unit 6 Patronage

103,582

▲ 41% vs June 2022

Unit 7 Revenue June 2023

$53,687

▲ 59% vs June 2022

Unit 7 Patronage
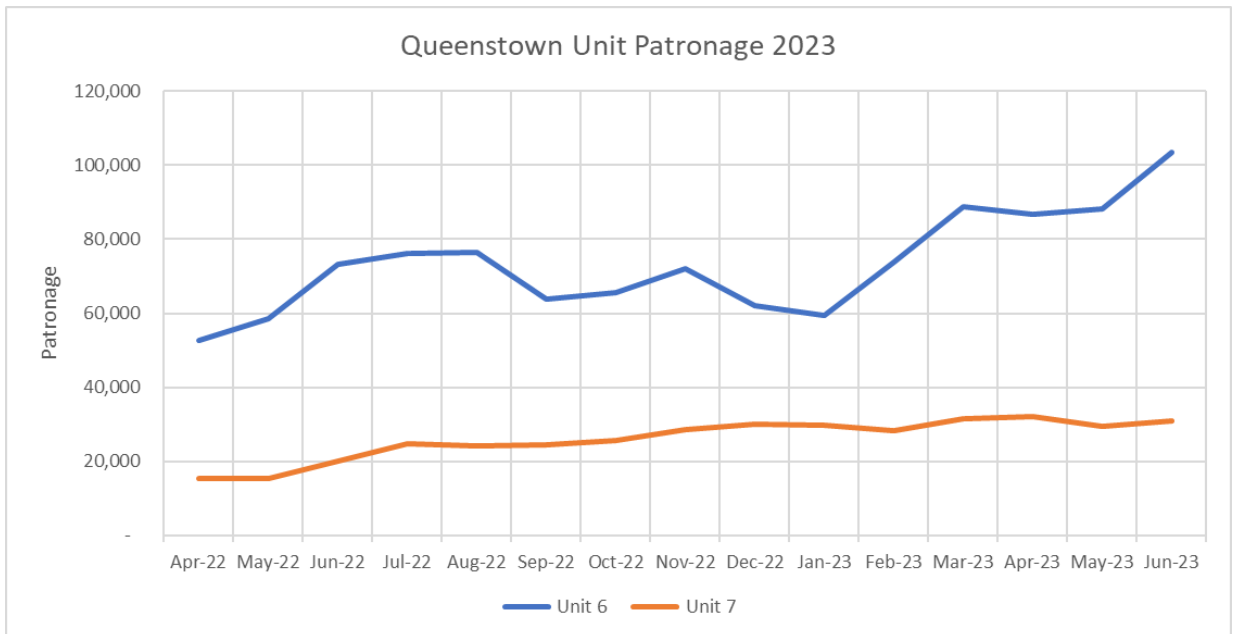
31,011

▲ 55% vs June 2022

Figure 4: Queenstown 2022/23 PTOM Unit performance

DISCUSSION – QUEENSTOWN FERRY

[29]   Figure 5 details Queenstown Ferry patronage and revenue for the 2022/23 financial
         year.

Queenstown Ferry

June 2023

Fare Revenue June 2023	2022/23 Fare Revenue financial year to date
$93,596.52	$972,334,958
▲ 203% vs June 2022	▲ 244% vs 2021/2022

Patronage June 2023	2022/23 Patronage financial year to date
8,526	104,420
▲ 29% vs June 2022	▲ 74% vs 2021/2022
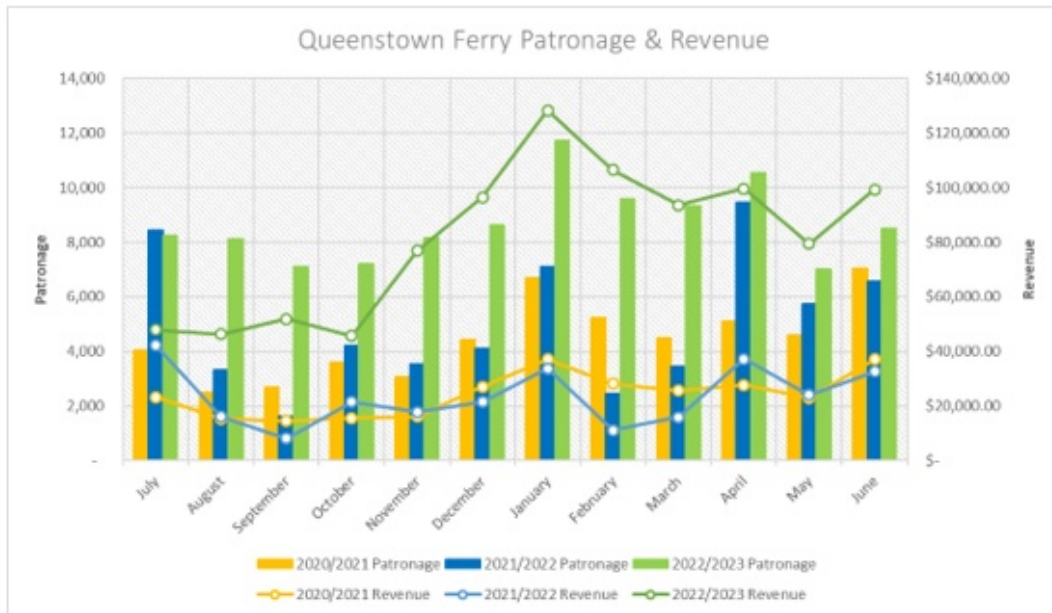
Patronage	July	August	September	October	November	December	January	February	March	April	May	June	Totals
2020/2021 Patronage	4,048	2,483	2,675	3,600	3,075	4,439	6,688	5,219	4,489	5,101	4,598	7,056	53,471
2021/2022 Patronage	8,449	3,336	1,630	4,200	3,533	4,134	7,123	2,453	3,448	9,456	5,728	6,564	60,054
2022/2023 Patronage	8,259	8,135	7,119	7,203	8,164	8,644	11,721	9,586	9,329	10,538	7,016	8,526	104,240

Figure 5: Queenstown Ferry 2022/23 Patronage and Revenue

[30]   Patronage for 2022/23 has increased by 74% compared to the 2021/22, and 95%
         compared to 2020/21

[31]   Fare revenue has increased by 244% since 2021/22. This is due to fare changes and the
         removal of concession cards.

DISCUSSION – TOTAL MOBILITY

[32]   Total Mobility patronage for 2022/23 is 109,358.

[33]   This is a 22% increase from 2021/22 and represents a return to pre-CVOID trends, see figure 6:
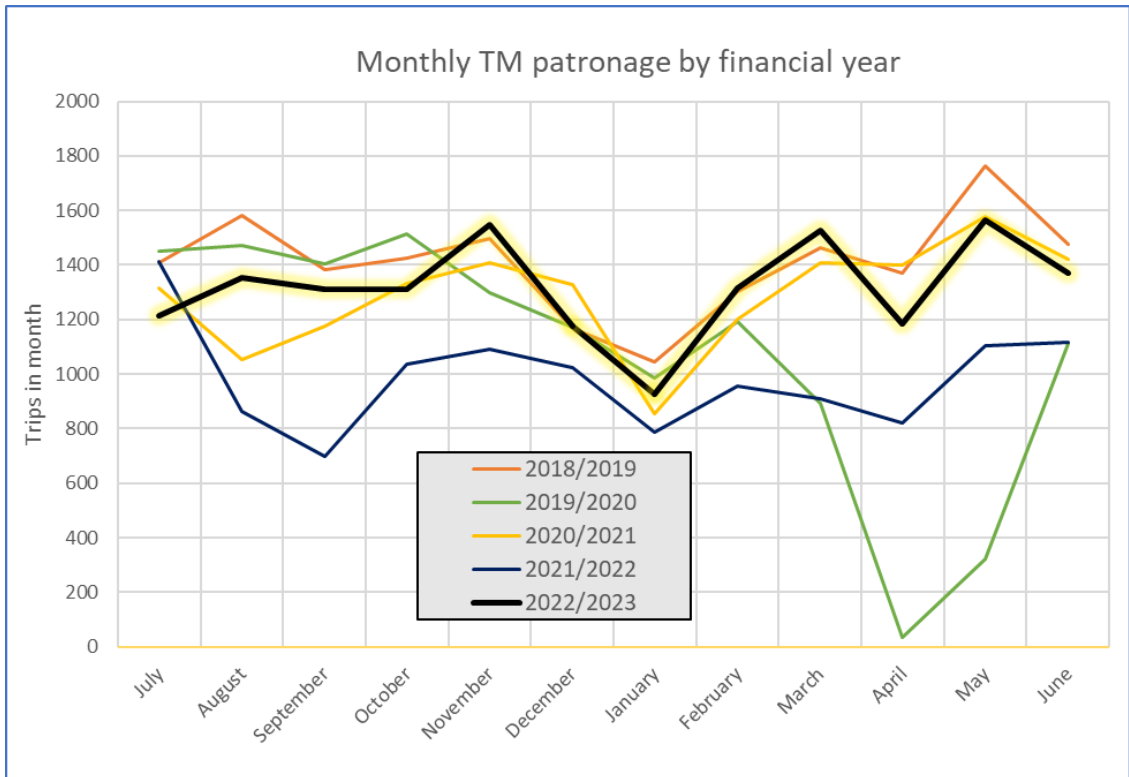
Figure 6: Total Mobility patronage, 2018/19 to 2022/23

[34]   Whilst trip numbers have increased, trip patterns have changed.
[35]   Fares have been permanently reduced from 50% to 25% of a full taxi fare, leading to passengers taking longer trips and driving increased spending.
[36]   Figure 7 compares a time series of average fares and average trip distances:
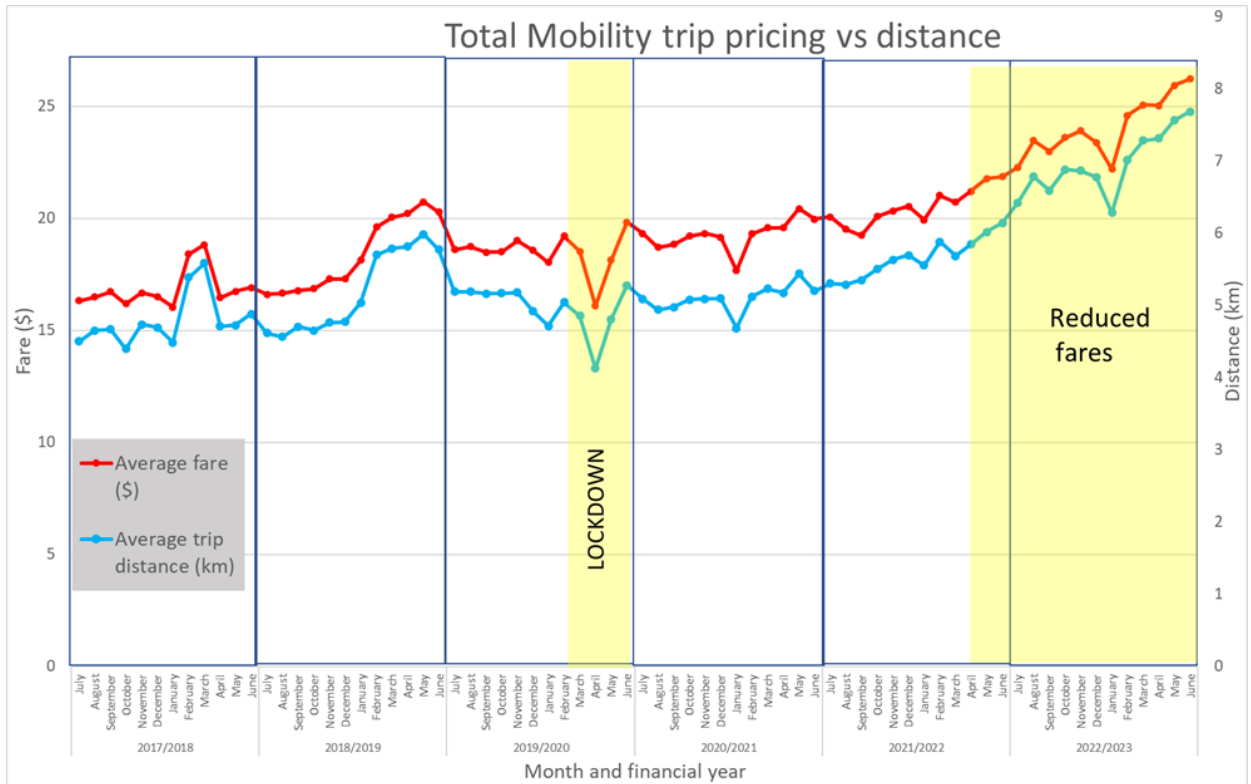
Figure 7: Total Mobility – pricing vs distance travelled

[37]   We can anticipate upward pressure on Total Mobility as both operators and users adjust to the new market conditions.

OPTIONS

[38]   Note this report

CONSIDERATIONS

Strategic Framework and Policy Considerations

[39]   Not applicable.

Financial Considerations

[40]   Not applicable.

Significance and Engagement

[41]   Not applicable.

Legislative and Risk Considerations

[42]   Not applicable.

Climate Change Considerations

[43]   Not applicable.

Communications Considerations

[44]   Not applicable.

NEXT STEPS

[45]   Provide an updated report to the Public and Active Transport Committee.

ATTACHMENTS

Nil

8.4. Shaping Future Dunedin Fares and Frequency Business Case - Updated Progress Report

Prepared for:	Public and Active Transport Comm
Report No.	OPS2329
Activity:	Transport: Transport Planning
Author:	Doug Rodgers, Transport Contractor
Endorsed by:	Pim Borren, General Manager Transport
Date:	9 August 2023

PURPOSE

[1]   To inform the Committee of further progress being made in the Shaping Future Dunedin Fares and Frequency Business Case since the lats update in May 2023.

EXECUTIVE SUMMARY

[2]   The Connecting Dunedin initiative is a partnership between the Dunedin City Council (DCC), Otago Regional Council (ORC) and Waka Kotahi NZTA.

[3]   From this partnership the Shaping Future Dunedin programme has developed several projects to address transport needs in the city.

[4]   The Fares and Frequency Public Transport Business Case is a project that has emerged to address future public transport needs in the city.

[5]   An update was presented to Council on the 10 May 2023. This report is a further update on progress, interim findings and key aspects of the business case to date.

[6]   This report shows that the preferred option is the provision of a low fare environment and improved service levels.

[7]   A free fare option has been examined and shows good mode shift and patronage, but the question of how such an option is funded has yet to be addressed.   Waka Kotahi has indicated it would not support a free fare regime as a matter of policy but will support the proposed service levels.

[8]   The further analysis, completed at low fare levels, shows that a 50c or $1 fare can either be close or achieve the goal of an 8% mode shift to public transport.

[9]   The economic, financial and commercial cases have yet to be delivered as part of this Business Case. They will form part of the Business Case upon completion and cover fundability, affordability, feasibility and value for money.

RECOMMENDATION

That the Committee:
   1) **Notes** this report.
   2) **Notes** that the best mode shift is achieved from a zero fares option
   3) **Notes** that approval of the business case by Waka Kotahi is contingent on paid fares being a feature of the preferred option.

BACKGROUND

[10]   Driven by Connecting Dunedin, The Shaping Future Dunedin Transport (SFDT) programme identifies changes to the Dunedin transport network to support the location of the New Dunedin Hospital, whilst at the same time providing a future-focused and accessible transport system.

[11]   The SFDT programme has set a target of 8% bus use for the journey to work by 2030, which will require a transformational shift in how people travel. The SFDT preferred programme includes a full range of activities of which the Fares and Frequency Single Stage Business Case (FFBC) is just one.

[12]   The purpose of the FFBC is to identify an appropriate public transport (PT) fares and frequency model and service offering for Dunedin's future, encourage mode shift and access, and contribute to the SFDT PT target and Dunedin's zero carbon goals.

[13]   Items that are in the scope of the study include:
   a. Patronage – forecasting, mode share targets.
   b. Service Levels – Review current service levels outlined in the RPTP and identify which service improvements will contribute to the mode shift to 8% public transport use.
   c. Fares – proposing fares that achieve the RPTP aspiration that fares should be affordable for bus users and ratepayers.
   d. Establish the "willingness to pay" levels through surveys and establish the optimum price point for fares.
   e. Superstops – identify the need, location and desirable attributes of the stops.
   f. Revenue- identify other sources of revenue that could be used by local government to purchase public transport services.
   g. Work completed to date includes the production of a draft strategic case, investment logic mapping, public survey, key stakeholder workshop and setting MCA criteria. These are covered further in this report.

[14]   To understand the community's needs/wants for the bus service, a public feedback survey was conducted. This was covered in the May 2023 report and showed that the most preferred option was a free fares regime. There was also support for very low fares.

[15]   As reported in May, stakeholder workshops were held to ascertain the views and needs of the wider stakeholder group in Dunedin. This enabled the development of more directed strategies and examined the options at that time within the scope of the business case.

[16] The workshop attendees included Te Whatu Ora, University of Otago, DCC, Waka Kotahi, Fisher and Paykel and Otago University Students Association as well as ORC staff. Feedback from the workshop showed a free fare option was preferred by attendees.

[17] The Investment Logic mapping process resolved one problem statement as shown in Figure 1 below and identifies three clear benefits; Access to work/education, mode shift to public transport, affordable and sustainable service provision.
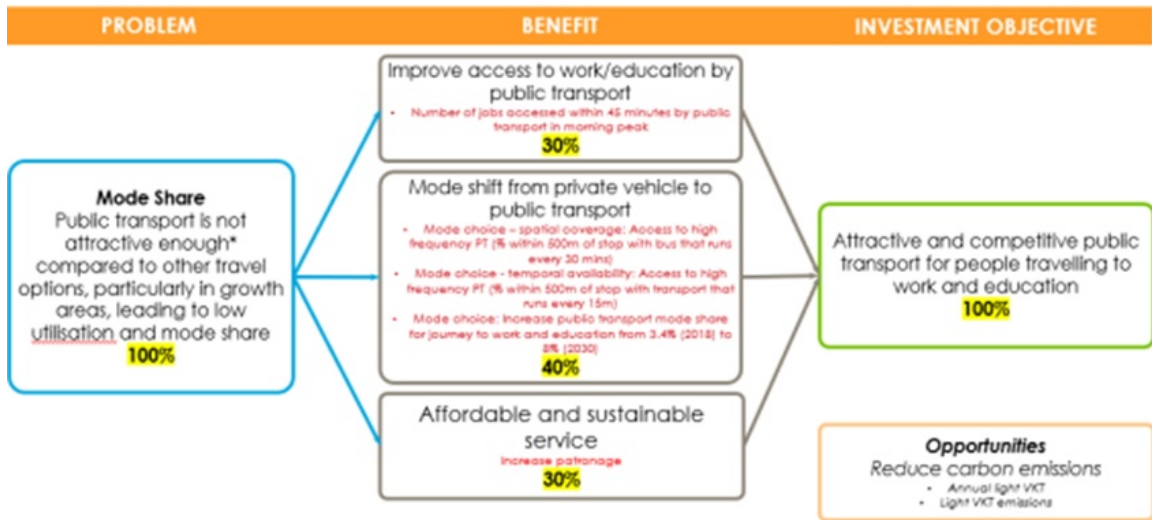
Figure 1. Investment Logic Map

DISCUSSION

Work completed to date

[18] Since the last report in May, the work completed has been:
  i.   Development of preferred service level options from a short list of packages
  ii.   Initial assessment of packages through levers tool and modelling to establish BCR
  iii.   Selection of a preferred service level option.
  iv.   Further amendment to packages with service levels enhanced and development of an additional service level package.
  v.   Modelling and analysis of fare options with the preferred service levels in terms of potential mode shift.
  vi.   Communication and consultation with Waka Kotahi regarding service levels and fare options
  vii.   Review of preferred options (paid and unpaid) with selected service level.
  viii. Meetings with Waka Kotahi and consultants to present ongoing findings and discuss options moving forward.

[19] Analysis of the fare options with the preferred package of service levels (package 16) showed that the largest mode shift attainable (towards the targeted 8% shift) was the free fare option with increased service levels and service spans (start and finish times). The preferred service levels are shown in Figure 2.

Package	Fare Revenue 2034-35 (m)	Net Cost (m)	Marginal Cost over old Do Minimum (m)	PT JTW Mode Share 2029-30	Value for money (mode share: net cost)	PT JTW Mode Share 2034-35
P16 with $2 fare	$5.3	$28.7	$14.1	5.5%	0.15	6.4%
P16 with $1 fare	$3.2	$30.8	$16.2	6.5%	0.19	7.7%
P16 with 50c fare	$1.7	$32.3	$17.7	6.9%	0.20	8.3%
P16 with 20c fare	$0.7	$33.3	$18.7	7.2%	0.20	8.7%
P16 with $0 fare	$0.0	$34.0	$19.4	7.4%	0.21	8.9%

Figure   2.   Preferred   Service   Levels   –   Package   16.

[20]   Package 16 was tested against a variety of fare levels.

[21]   The $2 fare, whilst maintaining the current regime, did not improve mode share towards the goal of 8% over the time required. It is a reasonable argument to make that a $2 fare is reasonable within the expectations of the RLTP and RPTP aspirations and goals.

[22]   The 20c fare was viewed as a virtually free service and was not supported by Waka Kotahi favourably, in the context of Waka Kotahi policy.

[23]   The next best option in terms of mode shift was a low fare regime with increased service levels.

[24]   The 50c and $1 fare options tested using the levers tool, in conjunction with the Package 16 service levels produced good mode shift as well as some fare revenue. With mode shifts have been estimated to provide mode shift for2034/35 measured at between 7.7% and 8.3%.

[25]   Mode shift for these options from the levers tool did not meet the 8% target by 2030.

[26]   A higher level of mode shift can be achieved by 2030 with a free fares option. The caveat to this is, as discussed, Waka Kotahi's lack of commitment to approve a free fares regime in conjunction with the improved service levels.

[27]   Current revenue from farebox in all of Otago is approximately $6.1M. Prior to the $2 fare trial this revenue was approximately $7.1M. For Dunedin farebox revenue is $3.6M. A zero-fare regime would need to account for this loss in revenue.

[28]   Discussions with Dunedin City Council at officer level have taken place on the options, however there is cause to have these at executive and governance level, to cover funding and contributions should a zero fares option be pursued.

[29]   As of the writing of this report, further modelling of two preferred options (50c and $1 fare options with the Package 16 level of service) has been completed. The results of this modelling are to be delivered shortly.

OPTIONS

[30]   Note this report

CONSIDERATIONS

Strategic Framework and Policy Considerations

[38]   The Otago Regional Council's 2021/31 Long-term Plan (LTP) outlines how activities undertaken by Council will help to achieve community outcomes. One of the Community Outcomes that ORC aims to achieve is sustainable, safe, and inclusive transport.

Financial Considerations

[39]   The project is tracking within budget.

Significance and Engagement Considerations

[40]   The Shaping Future Dunedin Fares and Frequency Business Case has been developed in partnership with Connecting Dunedin partners (ORC, DCC, WKNZTA).

Legislative and Risk Considerations

[41]   There are no legislative considerations regarding this paper.

Climate Change Considerations

[42]   No direct impact, however increasing patronage of public transport has emissions reduction and reduced vehicle kilometres travel impacts.

Communications Considerations

[43]   There are no communications considerations regarding this paper.

NEXT STEPS

[31]   Confirm service levels and fares
[32]   Complete business case.
[33]   Present Completed business case to Public Transport and Active Travel Committee

ATTACHMENTS

Nil

8.5. Queenstown Public Transport Services Business Case Update

Prepared for:	Public and Active Transport Comm
Report No.	OPS2331
Activity:	Transport: Public Passenger Transport
Author:	Lorraine Cheyne, Transport Manager
Endorsed by:	Pim Borren – General Manager, Transport
Date:	9 August 2023

PURPOSE

[1] The purpose of this paper is to update the Committee on the progress of the Queenstown Public Transport Business Case (QPTBC) over the past three months and provide an overview of the revised work programme for the next three months to see completion of the Business Case. It summarises work undertaken in the last three months, works anticipated in the next three months, and outlines key risks.

EXECUTIVE SUMMARY

[2] Since May the initial long list of future transport options have been evaluated through a series of workshops including a multicriteria assessment undertaken with the Way2Go partners. The short list options have been agreed by all partners.

[3] The project consultants have guided the partner agencies through a process to agree a reset of underlying assumptions for the Business Case, primarily taking account of changes in the timing of infrastructure and policy interventions which impact on the delivery of new and improved PT services.

[4] There has been dialogue with the Queenstown Airport, which developed and consulted on its masterplan proposal in June.

[5] It was previously decided not to publicly consult at the long-list of options phase. The next step now is to seek public feedback on the short-list of 3 options.

[6] Completion of the draft business case is now expected at the end of the year.

RECOMMENDATION

That the Committee:
  1) ***Notes*** *this report.*
  2) ***Notes*** *that the draft final business case will now be delivered in Q4 2023.*

BACKGROUND

[7] At its meeting on 10 May, the committee received a report updating recent work and outlining some key challenges for achieving the outcomes of the business case. A key concern at the time was preferred approach to consultation for the business case, in particular noting Queenstown Lakes District Council's (QLDC) recent (at the time) extensive community engagement through its Quality of Life Survey.

[8]   The long list of options being a mix of future routes/services and vehicles has been evaluated with a short list of options agreed by the project partners, Waka Kotahi and QLDC. This step enabled the learnings from the QLDC "Quality of Life" survey to be taken into account as part of the assessment of the long-list options. Public consultation for the business case will now seek feedback on a short list of the most feasible options.

[9]   The short list includes the 'Bus Max' option from the earlier Indicative Business Case stage, and an option with a spine corridor from Jacks Point to Queenstown Town Centre route, connecting with other services at the Frankton Hub.

[10]   These options will be evaluated with a sensitivity test of operating buses from Arrowtown via Malaghan's Road and a variation on the southern route on a new bridge across the Kawarau River linking directly to Remarkables Park.

[11]   A preliminary assessment has also been undertaken on the operation of larger bi-articulated buses on the transport network in and around the town centre, in particular.

[12]   The underlying assumptions for the reference case have been also reset and agreed upon with the partners. The purpose of the reset is to take into account the consideration of changes in the timing of infrastructure and policy interventions over the past year, such as the New Zealand Upgrade (NZUP) project infrastructure upgrades delivered by Waka Kotahi.

[13]   Ongoing dialogue with Queenstown Airport (QAC) has enabled a better understanding of interaction of the potential service pattern options with the QAC draft masterplan proposal.

DISCUSSION

[14]   The success of the future public transport programme requires other interventions to be in place to fully realise the benefits of investment in additional public transport services and infrastructure. If project partners are not able to deliver on these additional measures, the benefits that might be able to be achieved through PT investment are at significant risk.

[15]   Most critically, the desired outcomes are predicated on delivery of a whole package of sustainable transport and land use integration interventions, including the pricing and availability of parking, particularly in Queenstown Town Centre.

[16]   The PT business case will be a key element of the overall package, in the form of a significantly improved public transport network. However, the analysis is clear that the provision of more frequent and higher capacity services cannot deliver the whole intent of mode-shift, and that all elements need to come together.

[17]   A risk to the programme and the outcomes of the business case is the working assumption that all elements of the NZUP infrastructure, as originally announced, are delivered in time for the staged implementation of any new public transport network proposed by the business case. Due to construction and increased costs the scope of the NZUP being fully deliverable in funding envelope for Queenstown, or being able to be delivered through National Land Transport Fund (NLTF) funding may be challenging. Noting significant funding constraints for the next National Land Transport Programme (NLTP) period from mid-2024.

[18]   The NZ Upgrade Programme for Queenstown to be delivered by Waka Kotahi includes important bus priority measures. The Wakatipu Way2Go staff group recently reconfirmed priorities for bus priority interventions. A renewed focus will be identifying funding for improvements along on SH6A from Frankton to Queenstown Town Centre, where virtual priority around signalised intersections and allowing for safe pedestrian access across the very busy highway, is of particular importance.

[19]   In addition, service reliability from Fernhill and Sunshine Bay requires prioritisation of buses and/ or reduced traffic on Lake Esplanade and Shotover Street to ensure reliable operation of the whole network.

OPTIONS
[20]   Not applicable, the report is for noting.

CONSIDERATIONS

Strategic Framework and Policy Considerations
[21]   The Otago Regional Council's 2021/31 Long-Term Plan (LTP) and the Regional Land Transport Plan (RLTP) outline how activities undertaken by Council will help achieve community and transport outcomes. Council has the vision of sustainable, safe, and inclusive transport for its residents. The QPTBC delivers on ORC's commitments for PT provision in the Wakatipu Basin under the Way2Go Partnership.

[22]   The draft QPTBC will now be completed by the end of the calendar year.

Financial Considerations
[23]   The updated cashflow forecasts a marginally increased project cost on an agreed contract value of $963,852.00. This includes an agreed variation for additional PT modelling work to assess long-list service pattern options ahead of the W2G Management workshop. This was not allowed for in the provisional sum request

Significance and Engagement
[24]   The QPTBC has been developed in partnership with Way2Go partners (QLDC, Waka Kotahi and us). The further update to the previously proposed timetable for public consultation was made to avoid a clash with the General Election.

Legislative and Risk Considerations
[25]   There are no legislative considerations regarding this paper.

Climate Change Considerations

[26]   There are no direct climate change considerations, however, reducing vehicle kilometres travelled through increasing patronage of public transport aligns with the Government's priority actions for climate emissions reduction. The scale of the impact depends on the quantum of mode shift away from private vehicles delivered by the outcomes of the business case process

Communications Considerations

[27]   The Wakatipu Basin community will be consulted on the short-list options of the QPTBC.

NEXT STEPS

[28]   Upcoming work will finalise the strategic case for partner approval.

[29]   An indicative range of costings will be developed as an input to Long Term Plan and Regional Land Transport Plan processes.

[30]   The short list options will be developed to a higher level of detail and the emerging preferred option is expected to be confirmed.

[31]   Once confirmed, engagement material will be developed for the short list option for engagement.

[32]   The draft business case is scheduled to be completed in Q4 2023. The reason for the delay from the previously reported completion in Q3 2023 is due to work undertaken to evaluate the long-list options, and ensuring that the partners were aligned with the work undertaken before progressing to a detailed assessment of the short-listed options.

ATTACHMENTS

Nil

8.6. Public & Active Transport Connectivity Strategy

Prepared for:	Public and Active Transport Comm
Report No.	OPS2332
Activity:	Public & Active Transport: Transport Planning
Author:	Lorraine Cheyne, Transport Manager
Endorsed by:	Pim Borren
Date:	9 August 2023

PURPOSE

[1] The purpose of this report is to provide Councillors with a proposed way forward in developing a regional public and active transport connectivity strategy. Attached to this report is a detailed project plan, which demonstrates that there is a sound business case for undertaking this work.

EXECUTIVE SUMMARY

[2] At its 10 May 2022 meeting, the council's Public and Active Transport Committee (PATC) adopted Resolution CM23-170:

"Staff to progress a stage approach to development of regional public and active transport connectivity and that further work is undertaken on scoping a strategy by 20 August 2023."

[3] The scope of the regional Public and Active Travel Connectivity Strategy is proposed as being:
- High-level mode shift plan: setting out coordinated objectives, policies, and targets to deliver a step change in travel behaviour.
- Active travel strategy: developing a regional network of routes and delivering policy interventions to maximise walking, cycling, micro-mobility and travel using wheelchairs / mobility scooters; in particular to enhance access to the public transport system.
- Regional Public Transport Plan: A new document to replace the current 2021 version, and based on business case technical work which is ongoing at present.
- Prioritised integrated delivery plan: which makes the best possible case for transport investment across the whole region.

[4] The strategy work will be an important input into the Regional Land Transport Plan (RLTP), although not all public and active travel connectivity projects may be included by the time it needs to be finalised in April 2024. This means that once the strategy is complete, the RLTP may need to be varied to include additional investment projects. For the Long Term Plans (LTPs) of councils, local share of project funding will either need to be set aside in the current preparation process, or else included at the Annual Plan stages.

[5]   Additional staff and resources will need to be obtained in order to successfully deliver the Public and Active Travel Strategy work within a 9-12 month timeframe, especially as there will be a need for both robust technical evidence and detailed stakeholder engagement.

RECOMMENDATION

That the Public and Active Transport Committee:

1) **Notes** *this report.*
2) **Endorses** *the proposed approach to developing the Public and Active Travel Connectivity Strategy outlined in this report and the attached project plan.*
3) **Approves** *a "hybrid approach" to resourcing public and active transport connectivity at ORC which offers a balance between accessing skilled support to establish a strategic approach while developing capability and practice in-house at ORC.*
4) **Notes** *full implementation and delivery of regional public and active transport connectivity indicates on-going transport programme expenditure, subject to this being approved for inclusion in the LTP*
5) **Agrees** *to receive regular update reports and to participate in workshop sessions during strategy development.*

BACKGROUND

[6]   The Otago Regional Public Transport Plan (RPTP) describes current and proposed public transport services that will meet the needs of existing and new customers, and policies which those services will operate under. The RPTP also explains how ORC will work in partnership with bus operators, city / district councils - known as Territorial Authorities (TAs) and Waka Kotahi NZ Transport Agency.

[7]   Under the heading "Multi-modal access" the current RPTP document (pages 50 and 51) states:

"An integrated public transport network requires good connections by other modes, particularly by walking and cycling. Designing and planning for these modes as part of our network approach is critical to achieving our ambition to create a multimodal transport system and one that provides a viable alternative to driving a car."

[8]   The RPTP contains the following policies and actions in relation to multi-modal access:

Policy	Actions
Work collaboratively with Territorial Authorities, partner agencies, stakeholders and developers to enhance multi-modal access to the public transport network.	Work with territorial authorities to improve walking and cycling connections to public transport.
	Provide cycle parking at strategic locations where there is evidence of demand to support greater access to the public transport network by alternative modes.
	Identify opportunities to introduce supporting bicycle infrastructure at bus interchange facilities to support greater cycling access to the public transport network.
	Explore the feasibility of dedicated park and ride facilities, to provide greater connections between other modes and the public transport network.
	Identify the benefit of shared vehicles, demand responsive services, and other services infrastructure to increase

	accessibility to the public transport network.
Implement the "accessible journey" approach[1] to public transport by providing infrastructure and information that enables all people to access public transport services.	Work with territorial authorities, operators, and other stakeholders to implement the "accessible journeys" approach.

[1] The "Accessible Journey" approach means that all steps required for a person to get from their home to their destination and back again are regarded as linked and of equal importance. If one link is broken or inadequate, the whole journey becomes impractical or impossible.

[9] The 10 May PATC report noted good progress in some areas, but with more to be done across the region as a whole. The report also emphasised clear synergies between public and active travel, given that every bus journey starts and ends with a walking, cycling, micro mobility or assisted travel trip.

[10] Since that date a clear message coming from Waka Kotahi is that RLTPs need to demonstrate a level of ambition that is significantly greater than the ability of the National Land Transport Fund (NLTF) to invest in. The reason is a mix of alternative funding sources – such as the Climate Emergency Response Fund (CERF) – and strong policy support through the Emissions Reduction Plan (ERP) and National Adaptation Plan (NAP).

[11] Waka Kotahi is currently preparing a National Public Transport Plan, and it will be important for the Otago region to be ready for further funding opportunities that may arise.

[12] Finally, the Sustainable Public Transport Framework (SPTF) and amendments to the Land Transport Management Act (LTMA) require greater collaboration between Regional Councils and Territorial Authorities when preparing an RPTP.

[13] Consistent with this direction, an approach is proposed that gives greater profile and priority for non-car modes across Otago through a Regional Public and Active Travel Connectivity Strategy.

DISCUSSION

[14] The attached project plan both sets out the technical scope of work and range of other matters that need to be addressed during the work. The following table summarises the key points from the project plan

Definitions	Public transport: including bus, ferry, rail, on-demand, Total Mobility, and community transport. Active transport: walking, cycling (including e-bikes), wheelchairs, mobility scooters, and micro-mobility (including scooters and skateboards).
Project Vision	To be developed, but as a starting point: *"Otago is a leader and centre of best practice for enhancement of social inclusion*

	and sustainable economic growth, through development of an integrated regional public and active travel network."
Objectives	As a starting point could include: • Defining the benefits and added value of a regional approach to public and active transport. • Making strong links between transport and benefits to other policy areas, such as economic development, health, and climate change. • Generating commitment and partnership working from key stakeholders in improving public and active travel networks. • Showcasing a systems approach to planning and investment, where interventions add up to more than simply the sum of parts. • Demonstrating commitment to delivering key government and council policies in relation to transport, climate change, social inclusion, and safe / healthy communities. • Engaging the public and communities in articulating, planning, and delivering the benefits of public and active transport. • Producing a document that makes a strong strategic case for further investment (by government, councils and third parties) in public and active transport.
Policy Documents	• Climate Change Response (Zero Carbon) Amendment Act 2019. • Government Policy Statement on Land Transport (GPS), Ministry of Transport (MOT). • Arataki: 30-year view of the land transport system (Waka Kotahi). • Transport Outcomes Framework, MOT. • National Emissions Reduction Plan (ERP), Ministry for the Environment (MfE). • Decarbonising Transport Action Plan, MOT. • Otago Southland Regional Land Transport Plan (RLTP). • Otago Regional Policy Statement (RPS). • Otago Long Term Plan (LTP).
Technical Documents	All produced by Waka Kotahi (except the Queenstown mode shift plan): • Public transport network planning: a guide to best practice in NZ cities. • Cycling Network Guidance. • Pedestrian Network Guidance. • Public Transport Design Guidance. • Cycling Action Plan. • Keeping Cities Moving. • Better Ways to Go: Queenstown Mode Shift Plan. • One Network Framework.
Technical Scope	• Assessment of current and future demand for public and active travel. • Data assessment and gap analysis. • Future use of public and active travel data. • Needs assessment of different public and active travel groups, and gap analysis. • Definition of an integrated regional public and active travel network based on routes and services which people want to use. • Identification and investigation of integrated multi-modal travel and service hubs. • Definition of corridor and areas-based integrated transport packages. • Assessment of potential costs and demand for new public transport services, especially where none currently exist. • Access audits of existing and future public transport routes. • Investigation of existing and potential future regional active travel routes • Travel demand management and behaviour change interventions.

	• High level appraisal of potential costs and benefits.
Tasks	• Vision and objectives. • Challenges and opportunities. • Literature review. • Policy instruments. • Strategy development. • Impact assessment. • Public consultation. • Implementation. • Monitoring and evaluation.
Timescale	• Strategy *earliest* start date: early November 2023, or July 2024
Budget	• Between $80,000 and $500,000 depending on the delivery option (discussion below).
Risks (and mitigations)	• Insufficient staff resources (mitigated by appointment of experienced fixed term contractor). • Lack of TA and Waka Kotahi buy-in (mitigated by strong project collaboration and governance process). • Change in national government policy direction (mitigated by flexible project plan which can respond to political developments as and when they happen). • Misalignment with RLTP and LTP timescales (mitigated by early project identification and the option of variation to the RLTP as part of Annual Plan).
Reporting	• Officer level: Project Governance Group. • Political level: Public and Active Travel Committee, and also relevant TA Committees.
Stakeholders	• Territorial authorities: Dunedin City, Clutha District, Waitaki District, Central Otago District, and Queenstown Lakes District. • Waka Kotahi. • Iwi / hapu. • Public and community transport operators. • Public and active travel advocacy groups, including those representing disabled people. • University of Otago. • Local business, including tourism promoters. • Community and voluntary groups. • Department of Conservation. • Te Whatu Ora. • Ministry of Social Development. • Ministry of Disabled People.
Inter-dependencies	• Regional Public Transport Plan (RLTP). • Regional Land Transport Plan (RLTP). • National Land Transport Programme (NLTP). • Climate Emergency Response Fund (CERF). • Long Term Plans (LTPs). • Sustainable Public Transport Framework (SPTF). • Decarbonising Transport Action Plan. • Future Development Strategies (FDS). • Queenstown and Dunedin business cases.

OPTIONS

[15]   In terms of options for project delivery, three have been considered:

Option	Estimated Cost ($)	Pros	Cons
External consultancy	300,000 – 500,000	Work can be completed in a shorter period	Expensive and questions over consultant capacity in the current market
In-house Permanent FTE	150,000 – 200,000	Embeds internal capacity, best value for money option	Time to recruit the right person, which could delay the project
Hybrid approach (Fixed Term FTE)	200,000 - 250,000	Enables a relatively quick appointment, can develop internal capacity and capability	More expensive that permanent FTE, which will still be needed once the project is complete

[16] An assessment of the pros and cons of each option was undertaken is set out in Attachment 1. On balance, option 3 (hybrid approach) offers a balance between accessing skilled support for to establish an approach to public and active transport connectivity at ORC while developing capability and practice in-house.

[17] Under any of the above options, ORC will need to establish a permanent FTE role to take forward delivery of the regional Public and Active Travel Connectivity Strategy. This requires a sum of $150,000 to be budgeted in the LTP from July 2024 - 2027.

CONSIDERATIONS

Strategic Framework and Policy Considerations
[18] The ORC 2021/31 Long-term Plan (LTP) outlines how activities will help to achieve community outcomes. One of the Community Outcomes that ORC aims to achieve is sustainable, safe, and inclusive transport.
[19] The regional public and active transport connectivity strategy, and programme of activity, aims to work with communities to co-design projects to meet their needs and aspirations for health and wellbeing.

Financial Considerations
[20] The recommended approach to developing a Public and Active Connectivity Strategy requires an initial budget of $80,000.00 in 2023/2024 (not in budget), and ongoing budget of c$150,000 per annum for the three years of RLTP 2024 –27 (subject to confirmation in the LTP).

Significance and Engagement
[21] Community engagement will be a key component of the programme of activity. A full stakeholder map and engagement strategy will be an important early piece of work for the project.

Legislative and Risk Considerations
[22] The Regional Public Transport Plan (RPTP) is produced under Part 5 (section 116 to 129) of the Land Transport Management Act 2003. The Regional Land Transport Plan (RLTP) is produced under Part 2 (sections 12 to 18) of the LTMA 2003.

[23] A full programme-level risk assessment and mitigation strategy will be developed and monitored as work progresses.

Climate Change Considerations

[24] Along with improving accessibility a key and significant aim of the public and active transport connectivity strategy and programme of activity is to reduce the number of Single Occupancy Vehicle (SOV) trips in line with Vehicle Kilometres Travelled (VKT) targets. This is 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

Communications Considerations

[25] Strong and proactive communication to sell the benefits of an integrated approach to our stakeholders and the wider community will be an essential aspect of the strategy and programme.

NEXT STEPS

[26] Following committee approval of this report, next steps for development of a regional public and active transport connectivity strategy, and programme of activity, include:

- Appointment of a project manager and technical lead, either on a fixed term FTE basis or as a component of filling existing vacant roles.
- Setting up of the governance and project management structure.
- Formulation of a detailed project plan (and expanded version of the attachment).
- Early engagement with the Territorial Authorities, Waka Kotahi, and other key stakeholders.
- Rapid identification of projects for the RLTP.

ATTACHMENTS

1. ORC Project Plan Public and Active Travel Connectivity St (2) [**8.6.1** - 18 pages]
2. Public Active Transport Connectivity Strategy (2) [**8.6.2** - 2 pages]

Otago Regional Council	**Project Plan**		
Project Title:	Public and Active Transport Connectivity Strategy		
Project Sponsor:	Pim Borren		
Business Owner:	Lorraine Cheyne		
Project Manager:	To be confirmed		
Date: 24 July 2023	**Version:** 1	**Group:** Transport	**Prepared by:** James Llewellyn

1   Introduction

1.1   Purpose

At its meeting of 10 May 2023, the Otago Regional Council (ORC) Public and Active Transport Committee (PATC) adopted Resolution CM23-170:

"Staff to progress a stage approach to development of regional public and active transport connectivity and that further work is undertaken on scoping a strategy by 20 August 2023."

This Public and Active Transport Connectivity Strategy **Project Plan** addresses the Councillor direction and sets out the following:

- Definitions:
- Background;
- Mandate;
- Objectives;
- Strategic approaches to policy making;
- Key policy and technical documents;
- Technical scope and skills;
- Resourcing;
- Timescales;
- Governance;
- Risk assessment and mitigation;
- Stakeholder engagement; and
- Inter-dependencies.

In addressing these issues, the project plan represents a solid business case for ORC to spend time and money to develop a strategy that will significantly improve the prospects of obtaining funding to deliver the council's transport policy priorities.

1.2   Definitions

For the purposes of this Project Plan, the following definitions are used:

- **Public transport:** including bus, ferry, rail, on-demand, Total Mobility, and community transport.

- **Active transport:** walking, cycling (including e-bikes), wheelchairs, mobility scooters, and micro-mobility (including scooters and skateboards).

1.3   Background

1

Staff prepared a report to the 10 May PATC meeting which set out compelling reasons for developing a **regional Public and Active Transport Connectivity Strategy**, based on natural synergies:

- Every public transport journey has a first and last stage active travel leg to / from the stop or pick-up point, which can significantly limit access to the system if the route is difficult or unsafe;

- Daily travel is often characterised by "trip chains" where a variety of journey purposes and lengths are undertaken by a choice of different modes;

- Active travel routes and public transport services can be used on different legs (for example, a person walks and cycles to work downhill and in good weather; but has the option to get the bus back up hill and if it is raining); and

- Integration between public transport and active travel tourism so that the expense of car hire is avoided.

There are a number of other reasons which can be added to the above list, including:

- Regional Land Transport Planning, by implementing government mode shift policies such as Government Policy Statement on Land Transport (GPS), Arataki, and Emissions Reduction Plan (ERP) through the Regional Land Transport Plan 2024-27;

- Supporting the introduction of speed management plans, by making streets more people-friendly;

- Helping to implement the Regional Policy Statement (RPS) objectives on:

  - **Energy efficient transport**:

  "Placing a high priority on walking, cycling, and public transport, where appropriate; ii. Maximising pedestrian and cycling networks connectivity, and integration with public transport; iii. Having high design standards for pedestrian and cyclist safety and amenity."

  - **Urban design**:

  "Good access and connectivity within and between communities."

  - **Designing for public access**:

  "Design and maintain public spaces, including streets and open spaces, to meet the reasonable access and mobility needs of all sectors."

- Mitigation of climate change through the forthcoming Regional Spatial Strategies (recognising that transport is likely to be the most significant and effective policy lever, especially in the short to medium term); and

- Sustainable economic, social, and cultural regeneration, including close partnerships with Māori.

Councils both in New Zealand and abroad have developed, or are preparing, combined public transport and active travel strategies which bring together work being undertaken by different agencies. Taranaki Regional Council (TRC) is in the process of developing such a strategy (named "Better Travel Choices") and, in partnership with Territorial Authorities (TAs), there is a strong case for Otago to do likewise.

1.4   Project Mandate

The **political mandate** for the regional Public and Active Transport Connectivity Strategy is provided by the PATC Resolution CM23-170 – referred to in section 1 above.

The **legal mandate** is provided by Part 2, section 12, subsection 2 of the Local Government Act (LGA) 2002 states:

"For the purposes of performing its role, a local authority has—

2

(a)   full capacity to carry on or undertake any activity or business, do any act, or enter into any transaction; and

(b)   for the purposes of paragraph (a), full rights, powers, and privileges."

Subsection 5 goes on to say:

"A regional council must exercise its powers under this section wholly or principally for the benefit of all or a significant part of its region, and not for the benefit of a single district."

A primary reason for developing a regional public and active travel connectivity is to spread the benefits of good work being undertaken in some localities across the entire region, and also to ensure that places do not miss out because of their population size and geographic location.

The **policy mandate** comes from the current RPTP:

Under the heading "Multi-modal access" the current RPTP document (pages 50 and 51) states:

"An integrated public transport network requires good connections by other modes, particularly by walking and cycling. Designing and planning for these modes as part of our network approach is critical to achieving our ambition to create a multimodal transport system and one that provides a viable alternative to driving a car."

The current Otago RPTP contains the following policies and actions in relation to multi-modal access:

Table 1: Otago RPTP (2021) Policies and Actions

Policy	Actions
Work collaboratively with Territorial Authorities, partner agencies, stakeholders, and developers to enhance multi-modal access to the public transport network.	Work with territorial authorities to improve walking and cycling connections to public transport.
	Provide cycle parking at strategic locations where there is evidence of demand to support greater access to the public transport network by alternative modes.
	Identify opportunities to introduce supporting bicycle infrastructure at bus interchange facilities to support greater cycling access to the public transport network.
	Explore the feasibility of dedicated park and ride facilities, to provide greater connections between other modes and the public transport network.
	Identify the benefit of shared vehicles, demand responsive services, and other services infrastructure to increase accessibility to the public transport network.
Implement the "accessible journey" approach[1] to public transport by providing infrastructure and information that enables all people to access public transport services.	Work with territorial authorities, operators, and other stakeholders to implement the "accessible journeys" approach.

There are opportunities for a regional Public and Active Travel Strategy to assess, improve and deliver these policies as part of both the current RLTP review, and a refreshed RPTP that would be produced in the second half of 2024.

1.5   **Project Vision**

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[1] The "Accessible Journey" approach means that all steps required for a person to get from their home to their destination and back again are regarded as linked and of equal importance. If one link is broken or inadequate, the whole journey becomes impractical or impossible.

3

Whilst this is something that should be developed in partnership with stakeholders during the work itself, a working vision for this Project Plan could be:

"Otago is a leader and centre of best practice for enhancement of social inclusion and sustainable economic growth, through the development of an integrated region-wide public and active travel network across the entire region."

Otago already performs well in some areas, most notably:

- High performing public transport networks in Dunedin and Queenstown;
- Iconic long-distance walking and cycling trails; and
- Rapidly developing urban walking and cycling networks.

Nevertheless, there is still much work required to progress into a world class public and active travel system across the whole region, which includes focussing the needs of groups who – by reason of geography, socio-economic status, or disability – are not currently benefitting from current investment.

1.6 Project Objectives

Again, objectives for the strategy itself should be developed as an early deliverable of the work.

Objectives for the purpose of this Project Plan are:

- Defining the benefits and added value of a regional approach to public and active transport;

- Making strong links between transport and benefits to other policy areas, such as economic development, health, and climate change;

- Generating commitment and partnership working from key stakeholders in improving public and active travel networks;

- Showcasing a systems approach to planning and investment, where interventions add up to more than simply the sum of parts;

- Demonstrating commitment to delivering key government and council policies in relation to transport, climate change, social inclusion, and safe / healthy communities;

- Engaging the public and communities in articulating, planning and delivering the benefits of public and active transport; and

- Producing a document that makes a strong strategic case for further investment (by government, councils and third parties) in public and active transport.

1.7 Benefits

The key benefits for developing the strategy are:

- Maximising usage of the public transport network by reducing active travel barriers to access;
- Reducing Greenhouse Gas (GHG) emissions from transport, as part of New Zealand's globally determined contribution from the Paris Agreement;
- Strengthening the collective identity and voice of all councils and communities across Otago when it comes to transport and accessibility;
- Making most efficient and effective use of the road network, by delivering mode shift for a range of journey purposes and lengths; and
- Promoting sustainable economic growth and business support through promotion of green tourism based around public and active travel.

2 Approach to Policy Making

2.1 Introduction

4

Early studies of policy making highlighted two extreme approaches to decisions: a rational, analytical approach which leads inexorably to the "right" solution, and a less organised approach, often called "muddling through", in which objectives are never specified, remedial action is taken when it becomes essential, and more important decisions are dependent on the power struggles between interest groups. The regional Public and Active Transport Connectivity Strategy aims to find a practical approaches between these extremes.

2.2 Options

Vision-led approaches usually involve an individual (typically a mayor or committee chair) having a clear view of the future form of city they want, and the policy instruments needed to achieve that vision. The focus then is on implementing them as effectively as possible.

Plan-led approaches involve specifying objectives and problems, sometimes in the context of a vision statement, and adopting an ordered procedure identifying possible solutions to those problems, and selecting those which perform best. In the true Objectives-led Approach a strategy first specifies its broad objectives; and problems are highlighted as failure of current or predicted future conditions to meet the objectives. This list of problems can then be discussed with stakeholders to see whether they have different perceptions of the problems. If they do, objectives are redefined accordingly.

Consensus-led approaches involve discussions between the stakeholders to try to reach agreement on each of the stages in the plan-led approach. Ideally agreement is needed on the objectives to be pursued and their relative importance; the problems to be tackled and their seriousness; the policy instruments to be considered and their appropriateness; the selection of policy instruments which best meet the objective; and the way in which they should be combined into an overall strategy, and implemented. In practice much consensus-building focuses on the choice of policy instruments, but it can be considerably enhanced by considering objectives and problems as well.

2.3 Proposed Approach

The proposed approach to the Public and Active Transport Connectivity Strategy aims be a combination of all three.

It is proposed to involve the chair of the RTC and or a Co-Chair of the Public and Active Transport Committee as the public and political face of the strategy, as this will raise the project profile and importance of the work at local, regional, and national levels.

The plan-led approach will be pursued through a robust process of tasks and activities outlined in section 4 below.

The consensus-based approach will be delivered through a strong and inclusive project management and stakeholder engagement approach, outlined in sections 7 and 9 below.

3 Key Policy and Technical Documents

3.1 Introduction

The Public and Active Transport Connectivity Strategy needs to demonstrate consistency with and, where appropriate, give effect to, a variety of policy and technical documents.

The policy documents are about ensuring that the Public and Active Transport Connectivity Strategy enables consistent, effective, and evidence-based decision making with issues that matter to ORC and its communities. When it comes to obtaining central and local government funding, the Public and Active Transport Connectivity Strategy can only be effective in leveraging investment, if it can demonstrate ability to deliver the stated policy or policies.

The technical documents are about ensuring that the strategy adheres to best practice, and therefore delivers beneficial outcomes (for example reduction in Greenhouse Gas Emissions) that are claimed for it.

Table 2 summarises the policy documents which the Public and Active Transport Connectivity Strategy will need to consider:

5

Table 2: Policy Documents for Public and Active Transport Connectivity Strategy

Policy Document	Brief Description
Climate Change Response (Zero Carbon) Amendment Act 2019	Introduces 2050 emissions reduction targets that are consistent with the Paris Agreement's commitment to limit warming to 1.5˚C above pre-industrial levels. Emissions of all other greenhouse gases must reach net zero by 2050, which applies to transport.
Government Policy Statement on Land Transport	Sets out how money from the National Land Transport Fund (NLTF) is allocated towards achieving the Government's transport priorities, through ranges of funding within activity classes. A new GPS covering the period 2024-34 is imminent.
Transport Outcomes Framework	Helps the transport sector work together, provides a framework for assessing the effectiveness of policy, and ensures all forms of transport are considered when planning, investment and regulatory decisions are made.
Emissions Reduction Plan	New Zealand's first emissions reduction plan sets direction for climate action in the next 15 years, and sets out actions necessary to meet those targets (across every part of government and every sector of the economy, including transport).
Decarbonising Transport Action Plan	Identifies seven factors necessary to successfully embed a long-term strategic approach to transport emissions reduction: 1. Upholding Te Tiriti o Waitangi. 2. Relevant agencies leading in their areas of expertise. 3. Strategically sequencing interventions. 4. Delivering multiple benefits across multiple outcomes. 5. Working together and with communities. 6. Adapting swiftly when necessary. 7. Avoiding the risks of delayed action.
Arataki (Regional Direction)	The following directions identify the most important issues to be resolved over the next 10 years to make progress towards transport outcomes. • Begin to reduce vehicle kilometres travelled, focusing on Queenstown and Dunedin, in a way that's equitable and improves people's quality of life. • Plan and deliver growth and urban development, especially in rapidly growing Queenstown, in an affordable and cost-effective way that aligns with emissions-reduction goals. • Maintain and improve the resilience and efficiency of road and rail connections to surrounding regions and the Port Otago. • Improve access to social and economic opportunities, especially by public transport, walking, and cycling. • Provide better access for tourists in Queenstown and opportunities created by the new Dunedin Hospital. • Significantly reduce the harm caused by the transport system of Otago, especially through improved road safety and reduced pollutants dangerous to health. • Encourage growth and development in areas that already have good travel choices and shorter average trip lengths, like working with Queenstown Lakes District Council (QLDC) and central government to implement the Queenstown Lakes Spatial Plan. • Rapidly accelerate the delivery of walking and cycling networks, predominantly through reshaping existing streets, to make these options safe and attractive.

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Policy Document	Brief Description
	• Improve and expand public transport services, including exploring the potential for new and emerging technologies, such as on-demand services, to improve access to social and economic opportunities. • Better understand the impact of future economic transformation on travel patterns and freight volumes. • Explore opportunities to move to a multimodal freight system with greater use of rail and coastal shipping. • Continue involvement in the Milford Opportunities Project to encourage resilience, tourism, safety, and mode shift for the Milford corridor, and surrounding region. • Confirm how resilience risks will be addressed over time, and work with communities to plan for when to defend, accommodate, or retreat. • Continue to implement road safety plans and programmes including those focused for iwi Māori. • Improve or maintain, as appropriate, physical access to marae, papakāinga wāhi tapu, and wāhi taonga.
Otago and Southland Regional Land Transport Plan	The primary document guiding integrated land transport planning and investment within the combined Otago and Southland regions - prepared as required by the Land Transport Management Act 2003 (LTMA) and consistent with the Government Policy Statement on Land Transport 2018-2021 (GPS).
Otago Regional Public Transport Plan	A strategic document that directs ORC public transport focus and investment over the coming decade and provide clear direction on how to respond to future challenges and opportunities. Describes proposed public transport services that will meet the needs of new and existing customers and the policies which those services will operate under; also explains how ORC will work in partnership with Territorial Authorities.
Otago Regional Policy Statement	Provides an overarching policy framework that identifies and drives progress on significant resource management issues facing the region; aiming to achieve long-term environmental sustainability by integrating the protection, restoration, enhancement, and use of natural and physical resources at a region-wide level.
Otago Long Term Plan	Describes ORC work (or activity) and the broader results (or community outcomes) that are expected – having a strong financial focus showing the resources needed to deliver the work and the approach to ensure that resources are available. Provides detailed activities for the first three years and less detail to year 10. One of the Community Outcomes that ORC aims to achieve is sustainable, safe, and inclusive transport.
Otago Climate Change Strategy	*Under development*

Where relevant, it will also be necessary to ensure there is consistency with Territorial Authority District Plans, especially where they explicitly identify public and active transport as a priority.

Table 3 summarises the technical documents which the Public and Active Transport Connectivity Strategy will need to consider:

Table 3: Technical Documents for Public and Active Transport Connectivity Strategy

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Technical Document	Brief Description
Public transport network planning: a guide to best practice in NZ cities: New Zealand Transport Agency research report 396	Explores the potential for implementing the "network-planning" approach to the design of public transport services, to significantly improve both patronage and efficiency in the use of public subsidies in the urban regions of Auckland, Wellington, and Christchurch. Waka Kotahi Research Report 396: Public Transport Network Planning
Cycling Network Guidance	Aims to promote a consistent, best-practice approach to cycling network and route planning throughout New Zealand. It sets out a principles-based process for deciding what cycling provision is desirable, and provides best-practice guidance for the design of cycleways. Waka Kotahi Cycling Network Guidance
Pedestrian Network Guidance	Provides best practice for planning, designing and creating walkable communities throughout New Zealand. Waka Kotahi Pedestrian Planning and Design Guide
Public Transport Design Guidance	Draft guidance for designing high-quality, people-focused public transport throughout New Zealand. Waka Kotahi Public Transport Design Guidance
Cycling Action Plan	Sets out a pathway to significantly increase the safety and attractiveness of cycling and micro mobility in towns and cities across Aotearoa New Zealand. Waka Kotahi Cycling Action Plan
Cycling Research	Research conducted to improve the safety of all road users and to encourage more people to get about by bike. Waka Kotahi Cycling Research
Keeping Cities Moving	Looks to build a modern transport system with a mix of reliable transport options that help keep people and products safely moving, by shaping urban form, making shared and active modes more attractive, and influencing travel demand and transport choices. Waka Kotahi Keeping Cities Moving
Better Ways to Go: Queenstown Mode Shift Plan	Sets out how the partners will achieve a gradual, but enduring, and significant shift away from the private car for journeys within the district; including a context for the district's rapid growth, its unique characteristics and plans for the future. Queenstown Mode Shift Plan
One Network Framework	A tool to help establish transport network function, performance measures, operating gaps and potential interventions for each road and street type. Waka Kotahi One Network Framework

In addition to the above, Vehicle Kilometres Travelled (VKT) Reduction Strategies will be prepared for Dunedin and Queenstown. The Waka Kotahi Cycling Action Plan promises more guidance before the end of 2023. Therefore technical guidance is evolving all the time, and keeping on top of it all is quite a task in itself.

There are likely to be other highly relevant technical documents from overseas which could also be used to inform the Public and Active Transport Connectivity Strategy, and an early action in the project will be a full literature review to obtain the most important of these documents. Many of the documents in the above table are focussed on larger urban areas, and there is a need to gain greater understanding of strategies for public and active transport in the smaller townships and rural areas of the region.

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4 Technical Scope

4.1 Introduction

The technical scope sets out the main public and active transport work that will be undertaken during the project. A key issue is the extent to which the strategy simply consolidates work that is already going on across the different Territorial Authorities, and what new work is required to develop an integrated regional strategy. Experience suggests that some Territorial Authorities will be well advanced with their work, whereas others will have done much less. Therefore, the likelihood is that the strategy will be a mix of existing initiatives and potential new ones.

There is also a related question as to the added value of a regional approach to both public and active travel. Under the new Sustainable Public Transport Framework (SPTF), public transport is very much a collaborative effort and is legally mandated as such in amendments to the Land Transport Management Act (LTMA). Active travel has traditionally been the preserve of Territorial Authorities, but again a collaborative approach with Regional Councils would seem to be more beneficial as it would enable development of an integrated system across different council areas.

4.2 Outline Structure

The structure and content of a regional Public and Active Transport connectivity strategy document is proposed to be:

- **Part 1: High level 30-year mode shift plan**, which**:**

  o Aligns with national Emission Reduction Plan (ERP), Ministry of Transport (MOT) Decarbonising Transport Action Plan and Waka Kotahi Arataki 30-year view.
  o Defines policies that will be used to deliver a step change in travel behaviour through choice.
  o Proposes a mode shift and sustainable accessibility strategy which promotes public transport, walking, cycling and micro-mobility as an integrated system.
  o Is structured around the three pillars of urban form, promoting alternatives to the car, and travel demand management.
  o Is based on a regional public and active travel network of multi-modal transport and service hubs.
  o Builds on existing strategies, in particular Queenstown.
  o Links to the strategies and programmes of Canterbury and Southland. Defined
  o Implemented by two more focussed strategies (parts 2 and 3) and a delivery programme (part 4).

- **Part 2: Multi-year active travel strategy** which:

  o Integrates work undertaken (or being undertaken) by the TAs and Waka Kotahi into a region-wide active travel network (including links to adjacent regions).
  o Proposes added value regional active travel interventions which are wrapped around a compelling brand which could become a significant selling point for residents and visitors.
  o Sets high standards of accessibility can be set for access to the public transport system - including bus stops and integrated mobility hubs established in the larger centres / destinations.
  o Delivers a step change in active travel and accessibility for disabled people, and other groups who are currently marginalised.
  o Ensures that active travel and public transport routes will be planned, delivered, and marketed as multi-modal corridors and areas.

- **Part 3: 10-year Regional Public Transport Plan (RPTP)** which:

  o Meets all the statutory requirements of the LTMA and also best practice guidance.
  o Defines public transport services which are integral to the network.
  o Sets out the objectives, policies and actions which pertain to that network.
  o Defines the access needs of people, and works in synergy with active travel corridors.
  o Sets out a clear pathway for bus fleet decarbonisation.

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- o Can be "pulled-out" as a stand-alone document when that is required by law or Waka Kotahi funding requirements.

- **Part 4: Integrated, costed, and prioritised delivery programme**, which:

  - o Aligns strongly with government objectives and funding criteria.
  - o Is based on a robust management method and governance structure.
  - o Focusses on delivering benefits through monitoring, evaluation, and continuous improvement.
  - o Promotes partnership working as an effective means of sharing resources and expertise, and developing a "one-team" culture across organisations and stakeholders.

4.3 Technical Scope

The technical scope of work aims to ensure that the strategy is based on solid evidence of addressing barriers to the use of public and active travel, as well as the opportunities for improvement.

Technical tasks will include:

- Assessment of current and future demand for public and active travel;

- Data assessment and gap analysis;

- Future use of public and active travel data;

- Needs assessment of different public and active travel groups, and gap analysis;

- Definition of an integrated regional public and active travel network based on routes and services which people want to use;

- Identification and investigation of integrated multi-modal travel and service hubs;

- Definition of corridor and areas-based integrated transport project packages;

- Assessment of potential costs and demand for new public transport services, especially where none currently exist;

- Access audits of existing and future public transport routes;

- Investigation of existing and potential future regional active travel routes;

- Travel demand management and behaviour change interventions; and

- High level appraisal of potential costs and benefits.

4.4 Tasks and Activities

Table 4 summarises the tasks and activities that will deliver the strategy. It is important to note that many of these will be undertaken in parallel and are interactive, rather than progressing in a strict linear fashion.

Table 4: Tasks and Key Activities

Task (and definition)	Activities
1. Vision (compelling and practical narrative of what success will look like when it is achieved)	a. Visioning workshop b. Draft statement(s) and test c. Future system definition
2. Objectives (broad statements of the improvements which an area is	a. Objectives workshop b. Draft objectives and test c. Key Performance Indicators

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Task (and definition)	Activities
seeking in its land use and transport system)	d. Target definition e. Rapid project identification for RLTP
3. Challenges and opportunities (issues which prevent the transport system to realise its full potential, and enablers which can be used to make progress)	a. Public engagement b. Hypothesis formulation c. Data review and gap analysis d. Data collection e. Challenges and opportunities workshop f. Evidence-based challenges and opportunities
4. Literature Review (policies and technical standards to be taken into consideration during strategy development)	a. New Zealand policy assessment b. New Zealand technical assessment c. Overseas policy and technical assessment d. Literature review of challenges and opportunities
5. Policy instruments (tools which can be used to overcome problems and achieve objectives)	a. Policy instruments and technical standards b. Policy instruments contribution to challenges and opportunities c. Package policy instruments
6. Strategy Development (combination of instruments selected to mutually reinforce one another in meeting objectives)	a. Strategy development workshop b. Urban form c. Alternatives to car travel d. Travel demand management e. Operational integration across different services, f. Strategic integration between infrastructure, management, information, and pricing g. Policy integration between transport and land use h. Policy integration with health, education, economic development, and social inclusion i. Organisational integration of government bodies and agencies
7. Impact Assessment (quantitative and qualitative forecasting of beneficial impacts, and any unintended consequences, of strategy responses)	a. Option development workshop b. Appraisal against policy objectives c. Value for money in addressing the problems d. Deliverability on the ground
8. Public Consultation (opportunity to test, learn, and refine the strategy, and for the public to have their say)	a. Consultation document b. Questions c. Response analysis d. Strategy refinement
9. Implementation (Legal, technical, practical financial, and political barriers and their successful resolution)	a. Prioritisation workshop b. Phased action plan c. Lead and supporting organisations d. Funding and resource assessment e. Phased programme timeline f. Risk assessment and mitigation plan g. Benefits realisation plan h. Stakeholder management plan
10. Monitoring and Evaluation	a. Baseline data requirements b. Targets

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Task (and definition)	Activities
(ex-post evaluation of project and strategy implementation, lessons learned, and assessment of benefits realised)	c. Before and after surveys d. Monitoring and evaluation methods e. Benchmarking f. Strategy review

5 Resourcing

5.1 Introduction

The activities and tasks outlined in section 4 above represent a substantial piece of work that would be ideally undertaken over a period of around 12 months.

The challenge for ORC is to progress an effective and value for money approach, which is based on obtaining the right resources and increasing capacity / capability of the in-house team.

5.2 Resource Assessment

To deliver the scope outlined in section 4, a multi-disciplinary team of ORC and Territorial Authority officers should be established. In terms of the ORC resource requirement – based on Full Time Equivalent (FTE) percentages - an initial estimate is set out in Table 5. These FTE assessments apply to the entire duration of the project, which is estimated at nine months.

Table 5: ORC Staff Resource Estimate

Role	Estimated FTE
Project Manager	0.2
Technical Lead	0.8
Transport Manager	0.1
Senior Transport Planner (Strategy)	0.2
Senior Transport Planner (Tactical)	0.2
Operations and Data Advisor	0.2
Operations Advisor (Infrastructure)	0.2
Operations Advisor (Service Delivery)	0.2
Advisor (Iwi Relations)	0.2
Communications and Stakeholder Management Officer	0.4
GIS, mapping, and desk-top publishing	0.5
All	**3.2**

Once the project is complete, ORC will require a permanent FTE role to deliver the programme of activities; and it is likely that the larger Territorial Authorities may also require 0.5 FTE roles for the same reason.

5.3 *To Be Completed*

6 Timescales

6.1 Outline Project Timescale

To be completed

6.2   **Phasing of Outputs**

The phasing of final draft outputs is proposed as follows:

- **Rapid project identification for RLTP:** September 2023.

- **High level mode shift plan:** XXXX.

- **Active travel strategy:** XXXX.

- **Regional Public Transport Plan:** XXXX.

- **Public consultation material:** XXXX.

- **Integrated delivery programme:** XXXX

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7   Project Governance

7.1   **Introduction**

Clear roles and responsibilities are essential for ensuring there is both accountability and responsibility given to the project team.

7.2   **Project Team**

The following table details roles and responsibilities.

Table 6: Governance Roles and Responsibilities

Role	Job Title	Person	Key Responsibility
Senior Responsible Owner (SRO)	General Manager	Pim Borren	Overall sign off for study and strategic advice around key processes such as LTP
Senior User (SU)	Transport Manager	Lorraine Cheyne	Ensuring that study outputs are practical and usable for future work across planning and operations, and deliver against council priority outcomes
Project Manager (PM)	To Be Confirmed	To Be Confirmed	Day to day management of project team, and co-ordination of information provision
Senior Supplier (SS)	To Be Confirmed	To Be Confirmed	Delivery of all technical tasks and outputs - as set out in the contract - to the required budgets, timescales, and quality standards
Senior User (SU)	To Be Confirmed	To Be Confirmed	Operational planning and delivery of the strategy
Project Team (PT)	As outlined in Table 5 above		Progression of the practical and technical tasks
Project Governance Group (PGG)	ORC and Territorial Authority Managers	Lorraine Cheyne (ORC) *Nick Sargent* (DCC) *Tony Pickard* (QLDC)	Provision of overall advice and advice on study strategic direction and outcomes

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Role	Job Title	Person	Key Responsibility
		Mike Harrison (WDC) TBC – Central Otago District Council and Clutha District Council. James Caygill (Waka Kotahi)	
Project Working Group (PWG)	ORC, Territorial Authority and Waka Kotahi Officers responsible for Transport	Project Manager Technical Lead ORC FTE Territorial Authority Officers, Waka Kotahi (TBC)	Provision of technical advice, investment priorities, data, and evidence

7.3   Reporting

To ensure the Project Manager is kept regularly informed of progress and any risks / issues, and that these are reported to the various governance groups as required, the following reports to be submitted:

- **End Stage Report:** summarises key issues encountered, mitigation action taken, and any lessons learned for the remaining stages.

- **Highlight Reports:** a weekly report will summarise progress made and highlight any risks / issues that have become apparent.

- **Issues and Opportunities and Actions Register:** describes how these matters are being identified, captured, assessed, escalated, and resolved. If there are issues which threaten the integrity and objectives of the report, then these will be reported to the Project Manager.

- **Political Governance Reports:** Regular progress updates – along with any requests for strategic direction.

- **End Project Report:** Produced at the end of the strategy, and summarise any lessons learned which can be taken forward into the delivery phase.

8   Risk Assessment and Mitigation

8.1   Introduction

An understanding of the key risks is important to inform the Public and Active Transport Connectivity project. As the project progresses, a more comprehensive risk register and mitigation strategy will be developed, based on the conclusions of the discovery and best practice research work.

8.2   Risk Register and Mitigation Strategy

The initial risk register and mitigation strategy is outlined in Appendix 1. This can be added to as the project progresses.

9   Stakeholder Management and Engagement

9.1   Introduction

Targeted stakeholder engagement could be an important element of the study as a means of understanding current challenges and opportunities.

9.2   Stakeholder Engagement

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Table 7 provides an assessment of proposed stakeholder engagement for the regional Public and Active Transport Connectivity Strategy. Key stakeholders and partners are listed, along with an initial assessment as to their engagement level, namely:

- **Empower:** Implement what stakeholder decides – makes final decisions.

- **Inform:** Keep up to date on project progress.

- **Consult:** Keep informed and listen to feedback, provide feedback on how input influenced decisions.

- **Involve:** Work with the stakeholder, ensuring issues directly impact decisions.

Table 7: Stakeholder Engagement Assessment

Stakeholder	Engagement Level
ORC officers with interests / responsibilities for wider policy areas such as spatial planning	Inform, consult, involve
ORC officers with wider transport policy, strategy, and delivery responsibilities	Inform, consult, involve
ORC senior officers and councillors	Inform, consult, involve, empower
Territorial senior officers and councillors	Inform, consult, involve
Waka Kotahi	Inform, consult, involve
Iwi / hapu	Inform, consult, involve, empower
Public and community transport operators	Inform, consult, involve
Public and active travel advocacy groups, including those representing disabled people	Inform, consult, involve
University of Otago	Inform, consult
Local business, including tourism promoters	Inform, consult
Community and voluntary groups	Inform, consult
Department of Conservation	Inform, consult
Te Whatu Ora	Inform, consult
Ministry of Social Development	Inform, consult
Ministry of Disabled People	Inform, consult

This engagement assessment only applies to the regional Public and Active Transport Connectivity Strategy. The role of these stakeholders, and the engagement methods used, will be reviewed, and further updated if the project proceeds into delivery. At this stage it is assumed that direct political engagement will not be required, although informal briefing may be.

10   Inter-dependencies

10.1   Introduction

Inter-dependencies describe how other initiatives, projects and external influences can potentially impact on the cost, timescale and quality of the project. Identification and assessment of inter-

dependencies is critical to ensure that the project adds value to, and is not adversely affected by, initiatives being pursued by stakeholders.

10.2   **Inter-dependency Assessment**

The below table summarises potential dependencies with wider projects or initiatives for the community transport project. Dependency ratings are as follows:

- **High:** project objectives and benefits are contingent on full integration with the other initiative.

- **Medium:** project objectives and benefits have a higher chance of being delivered with full integration.

- **Low:** there is the potential of full integration to positively influence project objectives and benefits.

Table 8: Inter-dependency Assessment

Dependency	Organisation	Timeframe	Description	Dependency Rating
Regional Public Transport Plan (RLTP)	ORC	2023 / 24	RPTP will be reviewed and updated as part of this project.	High (part of project)
Regional Land Transport Plan (RLTP)	ORC and TAs	By April 2024	RLTP will need to feature any investment proposals to deliver study recommendations.	High
National Land Transport Programme (NLTP)	Waka Kotahi	By June 2024	NLTP will be one of the potential delivery and funding routes for projects.	High
Climate Emergency Response Fund (CERF)	Ministry for Environment and Waka Kotahi	Ongoing	A likely alternative funding source to the NLTP.	High
Long Term Plans (LTPs)	ORC and TAs	By June 2024	ORC and Territorial Authorities must identify local funding share for projects.	High
Sustainable Public Transport Framework (SPTF)	Ministry of Transport	2023 / 24	SPTF provides the legal and regulatory framework for public transport and collaborative working.	Medium
Decarbonising Transport Action Plan	Ministry of Transport	2022/25	The action plan contains proposed workstreams with which the project should be consistent with.	Low
Future Development Strategies	Territorial Authorities	Various	The project should strongly support and integrate with sustainable land use proposals	Medium
Business Cases	Queenstown Lakes District Council	2024	The project will rely heavily on information and analysis of public transport and active travel options in Queenstown and Wanaka	High

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Dependency	Organisation	Timeframe	Description	Dependency Rating
Business Cases	Dunedin City Council	2024	The project will rely heavily on information and analysis of public transport fares and frequencies	High

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Form PM21

Appendix 1: Risk Assessment

Risk No.	Name of person who raised the risk	Risk	Inherent risk			Mitigating actions	Risk treatment	Who/when	Residual risk		
			Likelihood	Impact	Total				Likelihood	Impact	Total
1.		Insufficient staff resources to deliver the project to the required timescales and quality standards	H	H	H	appointment of experienced fixed term contractor	Mitigate	PATC budget approval required, followed by ORC officer decision	L	L	L
2.		Lack of Territorial Authority and Waka Kotahi buy-in to the project	H	H	H	Strong project collaboration and governance process from project inception	Mitigate	ORC Project Manager	L	M	L
3.		Change in national government policy direction	M	M	M	Flexible project plan which can respond to political developments as and when they happen	Accept	ORC Project Manager and Senior Leadership Team	L	L	L
4.		Misalignment with RLTP and LTP timescales	H	M	H	Early project identification and the option of variation to the RLTP and LTP (as part of Annual Plan)	Mitigate	ORC Project Manager and Senior Leadership Team	M	L	L

Attachment 2

Assessment of Resource Options

Option 1: External Consultancy Project   The advantage of this approach is that it would be the quickest way to deliver the work, and levers in outside expertise and capacity which may not be fully available within ORC. There is a clear and enforceable expectation based on a contract to deliver specific outputs.

The disadvantage is cost, with a budget anywhere between $300,000 and $500,000 likely to be needed (based on knowledge of previous commissions in other regions). Furthermore, consultancy resources are stretched with many of the big players involved in large Auckland and Wellington projects. Availability of the best people to work in Otago may be limited.

At the end of the consultancy project, there will still be a need for in-house staff to progress delivery of the strategy, and so external consultants may need to be paid for a handover period.

Option 2: Internal Full Time Equivalent (FTE) Resourcing - This option would be based on appointing an internal permanent Full Time Equivalent (FTE) officer, with support from other team members and key stakeholders.

The advantage of this approach is that embeds internal ORC ownership, capacity, and capability from the outset, without reliance on expensive external consultants. Staff who understand both internal and external relationships are in charge of the process, and fully responsible for delivering the project. This approach will deliver synergies and efficiencies, especially during reporting processes, workshops, and public consultation. Appointing an FTE would be significantly cheaper than external consultants, at around $150,000 - $200,000 per year, but it is likely that specialist skill sets would need to be brought in from time to time.

The downside of this option is timescales and potentially available internal budgets. Assuming that an FTE post is available, recruitment is likely to take between three and four months which will push up against the festive summer break. This means that work may not start until the new year. If an FTE post is not available, the Long Term Plan (LTP) will need to create one, which won't be confirmed until June 2024. This means that any recruitment cannot take place for another year, which would significantly delay the project.

Finding a suitably technical qualified and experienced candidate for the role may also be a significant challenge, as there is a dearth of people who have experience across both public and active transport planning (the former being particularly challenging).

Option 3: Hybrid Approach -The hybrid approach option would appoint a suitably qualified independent contractor on a fixed term basis to act as the project manager and technical lead. This person would therefore be fully integrated into the ORC team, and be able to develop in-house participation, capability, and coordination across all the activities and tasks. They could work with staff on key tasks across the technical disciplines. At the end of the strategy development phase, the in-house team will already be in a favourable position to assume delivery responsibility. This option can be progressed in tandem with option 2, as a permanent FTE to assume responsibility for strategy implementation is still a requirement.

It may be possible to use a currently vacant role within the team as the basis for the fixed term contract, although additional funding from a consultancy budget is likely to be required.

In the short term, this option will be more expensive than appointing a permanent FTE, with a budget of between $200,000 - $250,000 for an assumed for nine months of work. However, it could be possible to appoint an independent contractor within a few weeks, which means they can get on with work much earlier. Independent contractors often have broader skill sets, which mean that it may be possible to appoint someone who can cover both public and active travel.

Preferred Option - Selection of a preferred option for the project manager and technical lead is a trade-off between critical success factors of cost, timescales and appointing a technically competent team or person to deliver an excellent project. The last of these factors should certainly not be compromised, otherwise time and money will be wasted.

On balance, option 3 (hybrid approach) appears to represent the best balance between the three critical success factors, and will deliver against requirements to enhance the capacity and capability of the ORC in-house team.

Permanent FTE Role - Under any of the above options, ORC will need to establish a permanent FTE role to take forward delivery of the regional Public and Active Travel Connectivity Strategy. A sum of $150,000 - $200,000 would be required to be budgeted in the LTP from July 2024 onwards.

The Hybrid approach (Fixed Term FTE) option offers the best balance between timescale, costs, and development of internal capacity / capability, and is therefore the preferred approach. From the end of the strategy project, a permanent FTE will be required to lead delivery of the final programme of activities.