

Council Agenda 25 June 2025

Meeting will be held at Council Chambers, Philip Laing House, 144 Rattray Street, Dunedin and live streamed at [ORC YouTube Channel](#)



Members:

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

Senior Officer: Richard Saunders, Chief Executive
 Meeting Support: Kylie Darragh, Governance Support Officer

25 June 2025 10:00 AM

Agenda Topic	Page
Agenda	1
1. WELCOME	
2. APOLOGIES	
3. PUBLIC FORUM	
Pierre Marasti will speak on behalf of Extinction Rebellion. John Langley will speak on behalf of Guardians of Lake Hawea.	
4. CONFIRMATION OF AGENDA	
The agenda to be confirmed as published.	
5. DECLARATIONS OF INTEREST	
Members are reminded of the need to stand aside from decision-making when a conflict arises between their role as an elected representative and any private or other external interest they might have. The Register of Pecuniary Interests can be found on the ORC Website.	
6. CONFIRMATION OF MINUTES	5
Confirming the minutes of 21 May, 2025, as a true and accurate record.	
7. RECOMMENDATIONS ADOPTED AT COMMITTEE MEETINGS	10

7.1	Recommendations of the Finance Committee	10
7.2	Recommendations of the Environmental Delivery Committee	12
7.3	Recommendations of the Environmental Strategy and Planning Committee	14
8.	ACTIONS (Status of Council Resolutions)	15
9.	CHAIRPERSON AND CHIEF EXECUTIVE REPORT	18
9.1	Chief Executive Report	18
9.1.1	May 2025 Performance Report Exceptions	22
9.1.2	May 2025 Performance Reporting - Summary	24
9.1.3	May 2025 Customer Report	27
9.1.4	Statement of Comprehensive Revenue and Expense - 31 May 2025	29
9.1.5	Statement of Financial Position - Annual Report - 31 May 2025	30
9.2	Chairperson Report	31
9.2.1	2025-05-20 Letter from Min Chris Bishop re Bus Egress	33
9.2.2	2025-05-21 Letter from Min Penny Simmonds	34
9.2.3	2025-05-21 Letter to Otago Regional Council re transport	35
9.2.4	2025-05-27 Letter to Whaikaha - Ministry of Disabled People	38
9.2.5	2025-05-30 Letter to Hon Mark Mitchell	39
9.2.6	2025-06-06 Letter to Edward Ellison - ECO Fund	43
9.2.7	2025-06-13 Letter Crown Land Biosecurity	44
10.	MATTERS FOR CONSIDERATION	45
10.1	Regional Public Transport Plan Adoption	45
	To approve the Regional Public Transport Plan Hearing Panel's recommendations and adopt the Otago Regional Public Transport Plan 2025-2035 (RPTP).	
10.1.1	RPTP Summary of Submissions Post-Deliberations	55
10.1.2	RPTP Final Hearings and Deliberations Report	248
10.1.3	Draft Regional Public Transport Plan	300
10.1.4	List of Submitters Heard	425

10.2	Annual Plan 2025-26 - Adoption	426
<p>The purpose of this report is to adopt the Otago Regional Council Annual Plan 2025-26 and enable the subsequent approval of rates and charges for the 1 July 2025 to 30 June 2026 financial year. As part of adopting the Annual Plan, this report enables Council to formally approve changes to the draft estimates and work programme, which were provided to the community for feedback.</p>		
10.2.1	Draft Annual Plan	437
10.2.2	Schedule of Fees and Charges from 1 July 2025	537
10.3	Rates Report and Rates Resolution	544
<p>The purpose of this report is to provide details of each of the rates to be set, and to recommend that Council adopts the rates resolution for the 2025-2026 financial year.</p>		
10.3.1	Rates Resolution for Adoption 2025-26	551
10.3.2	Rating Resolution Examples 2025-26	558
10.4	Environmental Funding	572
<p>To present options to Council for approval for the delivery model of the new 'large-scale environmental fund'. At the Council meeting on 21 May 2025 this paper was laid on the table to enable staff to provide greater clarity on the eligibility criteria contained within the report. Amendments to this section have been made for the consideration of Council.</p>		
10.4.1	Frequency Report: Development and Implementation of 'Large-Scale' Environmental Funding	579
10.4.2	Frequency Report: Appendices	658
10.4.3	Frequency Report: Summary Report	880
10.5	Draft ORC Indigenous Biodiversity Strategy	901
<p>To seek Council endorsement of the draft Otago Regional Council Indigenous Biodiversity Strategy so that public consultation can commence in the second half of 2025.</p>		
10.5.1	Draft ORC Indigenous Biodiversity Strategy	907
10.6	Regional Deals	930
<p>Otago Regional Council (ORC), Central Otago District Council (CODC) and Queenstown Lakes District Council (QLDC) have formed a strategic partnership to develop a proposed Regional Deal for the Otago Central Lakes (OCL) region, aimed at unlocking long-term investment and coordinated regional development.</p>		
10.6.1	Memorandum of Agreement: Otago Central Lakes Regional Deal Negotiation Joint Committee	939
10.7	Revised Statement of Investment Policies and Objectives	948
<p>To approve the revised Statement of Investment Policies and Objectives (SIPO) incorporating changes resolved at the 6 March 2025 and 4 June 2025 Audit and Risk Subcommittee meetings.</p>		
10.7.1	Statement of Investment Policy and Objectives June 2025	952
10.8	Port Otago Statement of Corporate Intent	973
<p>To receive Port Otago's Draft Statement of Corporate Intent for the three years to 30 June 2028.</p>		
10.8.1	Statement of Corporate Intent	975

10.9 [Regional Software Holdings Limited Statement of Intent 2025-2026](#) 992

To receive Regional Software Holdings Limited's Draft Statement of Intent for 2025/2026, Half Yearly Report for the period ended 31 December 2024 and Annual Report for year ended 30 June 2024.

10.9.1 [Covering letter for Draft RSHL 2025-26](#) 996

10.9.2 [RSHL DRAFT Statement of Intent 2025-26](#) 1000

10.9.3 [RSHL Interim Report to Shareholders Pūrongo mō te Tau Haurua 31 December 2024](#) 1038

10.9.4 [RSHL Annual Report 2024 Final with Audit Opinion](#) 1080

10.9.5 [RSHL Shareholders Information Pack - Board Appointment Process 2025](#) 1128

10.10 [Documents Signed Under Council Seal](#) 1135

To inform the Council of delegations which have been exercised requiring application of the Council Seal during the period of 1 July 2024 to 9 June 2025.

10.11 [Delegations: Update to Council Delegations](#) 1136

To update specific delegations in the ORC Delegations Manual following the adoption of a new ORC committee structure in March 2025.

10.12 [2024 ORC Climate Strategy - Implementation and Effectiveness Report](#) 1138

To provide an annual report on the implementation and effectiveness of the 2024 Climate Strategy, which is a level of service target in the 2024-2034 Long-Term Plan.

10.12.1 [2024/25 Progress on Actions Listed in Climate Strategy 2024](#) 1143

10.12.2 [2024/25 Alignment of Actions Listed in Climate Strategy 2024 with 2024-2034 Strategic Direction Goals](#) 1152

10.12.3 [New actions Identified During Review of Climate Strategy](#) 1155

11. NOTICES OF MOTION

No notices of motion had been submitted at the time of publishing.

12. CLOSURE



Otago
Regional
Council

Council MINUTES

Minutes of an ordinary meeting of the Otago Regional Council held in the Council Chamber, Level 2 Philip Laing House, 144 Rattray Street, Dunedin on Wednesday 21 May 2025, at 1:00 PM.

https://www.youtube.com/live/_JdcFF3gJTg?si=6qRjYYsgaZuJS9Hb

PRESENT

Cr Gretchen Robertson	<i>(Chairperson)</i>
Cr Lloyd McCall	<i>(Deputy Chairperson)</i>
Cr Gary Kelliher	<i>(online)</i>
Cr Michael Laws	<i>(online)</i>
Cr Kevin Malcolm	
Cr Tim Mepham	
Cr Andrew Noone	
Cr Alan Somerville	
Cr Elliot Weir	
Cr Kate Wilson	

1. WELCOME

Chair Robertson welcomed Councillors, members of the public and staff to the meeting at 1 pm. Staff present included Richard Saunders (Chief Executive), Anita Dawe (GM Regional Planning and Transport), Nick Donnelly (GM Finance), online, Tom Dyer (GM Manager Science and Resilience), Joanna Gilroy (GM Environmental Delivery), Amanda Vercoe (GM Strategy and Customer, Deputy CE), Kylie Darragh (Governance Support), Libby Caldwell (Manager, Environmental Implementation), Elodie Letendre (Environmental Funding Lead), Sophie Gibson-Pinn, (Community Coordinator Biosecurity - Coastal), Emma Hodgkin (Frequency Senior Associate Project Management) Jean-Luc Payan (Manager Natural Hazards), Toan Nguyen (Senior Natural Hazards Adaptation Specialist), Ann Conroy (Team Leader Natural Hazards Adaptation).

2. APOLOGIES

Resolution: Cr Wilson Moved, Cr McCall Seconded:

That the apology for Cr Forbes be accepted.

MOTION CARRIED

3. PUBLIC FORUM

Pierre Marasti from Extinction Rebellion spoke to Council. There was an opportunity for questions and Chair Robertson thanked Pierre for attending.

4. CONFIRMATION OF AGENDA

The agenda was confirmed as published.

5. DECLARATIONS OF INTERESTS

Councillors were reminded of their need to manage any conflicts of interest. Cr Mepham and Cr Wilson declared conflicts and confirmed they would sit back from the table when the matters were heard.

6. PRESENTATIONS

No presentations were held.

7. CONFIRMATION OF MINUTES

Resolution: Cr Noone Moved, Cr McCall Seconded

That the minutes of the (public portion of the) Council meeting held on 20 November 2024, 19 March 2025 and 9 April 2025 be received and confirmed as a true and accurate record.

MOTION CARRIED

8. ACTIONS (STATUS OF COUNCIL RESOLUTIONS)

Open actions are scheduled to be reviewed in the June Council meeting.

9. CHAIRPERSON'S AND CHIEF EXECUTIVE'S REPORTS

9.1. Chief Executive's Report

Richard Saunders (Chief Executive) was available to respond to questions on the report.

Resolution: Cr Malcolm Moved, Cr Weir Seconded

That the Council:

1. **Notes** this report.

MOTION CARRIED

9.2. Chairperson's Report

Chair Robertson was available to respond to questions on the report.

Resolution: Cr Mepham Moved, Cr Weir Seconded

That the Council:

1. **Notes** this report.

MOTION CARRIED

10. MATTERS FOR CONSIDERATION

10.1. Eco Fund Applications Recommendations

[YouTube 1:04:55] This paper sought endorsement of the recommended applications for council to provide funding for the ECO Fund March 2025 round. Cr Mepham and Cr Wilson sat back from the table for this report. Cr Somerville acknowledged Edward Ellison with grateful thanks for his work on this fund over the years. Joanna Gilroy (GM Environmental Delivery) Libby Caldwell (Manager Environmental Implementation) and Elodie Letendre (Environmental Funding Lead) were present to respond to question on the report. An additional recommendation was added to the resolution.

Resolution CM25-153: Cr Somerville Moved, Cr McCall Seconded

That the Council:

1. **Approves** the reallocation of \$3,502 and \$35,000 from the internal budgets of Biodiversity operations and Land and Water operations respectively to provide funding towards the projects from Te Nohoaka o Tukiauau - Sinclair Wetlands and the Manuherekia Catchment Group (option 1 under budget reallocation).
2. **Approves** the funding recommendations of the ECO Fund Assessment Panel for the March 2025 round to a total value of \$1,059,178, as outlined in tables 3 to 8 (option 1 under general recommendations).
3. **Notes** that the annual review of the ECO Fund will be completed by October 2025 and the outcome of this review will be presented to Council for endorsement to enable the funding categories and criteria to be communicated prior to the next round in early 2026.
4. **Requests** that the Chair write a letter of thanks to Edward Ellison for his time spent supporting the ECO fund process.

MOTION CARRIED

Eight in favour, two abstained.

Cr Mepham and Cr Wilson abstained from the vote.

10.2. Site led programme update and funding recommendation for 2024/25

[YouTube 1:37:35] This paper provided an update on the current Site-Led Terrestrial Pest Management Programmes and sought approval for the allocation of a Site-Led budget to the areas as defined within the Otago Regional Pest Management Plan 2019-2029. Sophie Gibson-Pinn (Community Coordinator Biosecurity - Coastal) Libby Caldwell (Manager Environmental Implementation) and Joanna Gilroy (GM Environmental Delivery) were present to respond to questions on the report. Cr Mepham sat back from this paper.

Resolution CM25-154: Cr Weir Moved, Cr McCall Seconded

That the Council:

1. **Notes** this report and progress made to support the Site-Led Terrestrial Programmes to date.
2. **Approves** the allocation of \$59,626 to support biosecurity work on the first round of sites funded last financial year: Aramoana and Sandymount – Sandfly Bay sites.

3. **Approves** the allocation of \$133,811 to support the initiation of work at the second round of sites: Okia – Papanui – Taiaroa Hill and Leith Saddle – Mihiwaka.

MOTION CARRIED

Six in favour, three against, one abstained.

Cr Kelliher, Cr Malcolm, Cr Wilson voted against. Cr Mepham abstained from the vote.

At 2:50 pm it was moved Chair Robertson, seconded Cr Noone:

That Council adjourn for ten minutes.

MOTION CARRIED

Cr Weir left the meeting at 3:04 pm.

Cr Weir returned to the meeting at 3:08 pm.

10.3. Environmental Funding

[YouTube 2:15:40] This paper presented options to Council for approval of the delivery model of the new 'large-scale environmental fund'. Emma Hodgkin (Senior Associate Project Management Frequency Ltd), Libby Caldwell (Manager Environmental Implementation) and Joanna Gilroy (GM Environmental Delivery) were present to respond to questions on the report.

Resolution CM25-155: Cr Malcolm Moved, Cr Noone Seconded

That the Council:

1. **Lays** the paper on the table.

MOTION CARRIED

8 in favour, 2 against.

Cr Somerville and Cr Weir voted against.

Cr Wilson left the meeting at 4:41 pm.

Cr Wilson returned to the meeting at 4:42 pm.

10.4. Head of Lake Whakatipu Natural Hazards Adaptation Programme

[YouTube 3:20:10] This paper updated Council on the progress related to the development of a natural hazards adaptation strategy for the Head of Lake Whakatipu (Whakatipu-Wai-Māori) area. To present the final version of the Head of Lake Whakatipu Natural Hazards Adaptation Strategy, including a 'Condensed' version or overview for Council's consideration and adoption. Jean-Luc Payan (Manager, Natural Hazards) Toan Nguyen (Senior Natural Hazards Adaptation Specialist), Ann Conroy (Team Leader, Natural Hazards), were present to respond to questions on the report.

Resolution CM25-156: Cr Somerville Moved, Cr Weir Seconded

That the Council:

1. **Notes** this report.
2. **Notes** the progress of the Head of Lake Whakatipu natural hazards adaptation programme.
3. **Endorses** the Head of Lake Whakatipu Natural Hazards Adaptation Strategy detailed report (Appendix 1).
4. **Notes** the actions outlined for ORC in the Strategy Action Plan (Appendix 1, Section 10).
5. **Notes** the 'Condensed' overview document (Appendix 2).

MOTION CARRIED

All in favour.

14. CLOSURE

There was no further business and Chairperson Robertson declared the meeting closed at 4:51pm.

Chairperson

Date

DRAFT

Recommendation

That the Council adopt the recommendations of the 27-28 May 2025 Finance Committee.

Report	Resolution	Res#	Mover/ Second
Annual Plan 2025-26 Deliberations and Recommendations	<p><i>That the Committee recommends to Council:</i></p> <p>1) Directs Council staff on any changes required to the draft financial forecasts 2025-26 and work programme for inclusion in Annual Plan 2025-26, to be presented for Council adoption at its 25 June 2025 meeting including:</p> <p>a. Reserve fund \$700,000 of Land and Water Regional Plan expenditure (carried forward from the 2024-25 financial year).</p>	FIN25-106	Cr Wilson/Cr Mepham
Annual Plan 2025-26 Deliberations and Recommendations	<p>b. Rate fund additional expenditure in Public Transport Dunedin.</p>	FIN25-107	Cr Somerville/Cr McCall
Annual Plan 2025-26 Deliberations and Recommendations	<p>c. Agrees to use the unspent 2024/25 infrastructure funding to offset the 2024/2025 operational transport deficit for Dunedin and 2025/2026 operating costs in Queenstown.</p> <p>d. Requests that staff prepare a work plan that addresses any Health and Safety issues arising from the previously completed bus stop audit for delivery in the 2025/26 year.</p>	FIN25-108	Cr Robertson/Cr Noone
Annual Plan 2025-26 Deliberations and Recommendations	<p>e. Request that \$500k be removed from the Regional Planning component of the Policy budget as an identified saving from the current regional policy statement programme.</p>	FIN25-109	Cr Wilson/Cr Noone

Annual Plan 2025-26 Deliberations and Recommendations	<i>f. Agrees to fully fund a Wānaka/Upper Clutha public transport business case, to be funded from general rates at a cost of \$250,000.</i>	FIN25-110	Cr Laws/Cr Wilson
Annual Plan 2025-26 Deliberations and Recommendations	<i>i. Agrees to allocate up to \$2million to the new large scale environmental fund for Year 2, with the final amount determined through the fund allocation process.</i>	FIN25-111	Cr Mepham/Cr Weir
Annual Plan 2025-26 Deliberations and Recommendations	<i>j. Agrees to fund the new large scale environmental fund from reserves instead of rating for Year 2.</i>	FIN25-113	Cr Mepham/Cr McCall
Annual Plan 2025-26 Deliberations and Recommendations	<i>l. Request that Council staff provide a report on how to fund an investigation into using funds from the managed fund to increase ORC's contribution to biodiversity and biosecurity needs for the June 2025 Council meeting.</i>	FIN25-117	Cr Laws/Cr Malcolm
Annual Plan 2025-26 Deliberations and Recommendations	<i>4) Notes that the Council rates resolution will be provided to the 25 June 2025 Council meeting, following adoption of the Annual Plan 2025-26.</i>	FIN25-119	Cr Robertson/Cr McCall

Recommendation:

That the Council adopts the resolutions of the 5 June Environmental Delivery Committee.

Report	Resolution	Res #	Moved/Seconded by
Lake Hayes Wai Whakaata update	<p><i>That the Environmental Delivery Committee recommends that Council:</i></p> <p>1) Notes this report.</p> <p>2) Notes the progress of supporting and delivering water quality enhancement within the Lake Hayes/Waiwhakaata catchment.</p> <p>3) Endorses the Waiwhakaata strategy as a document that sets the direction, in principle for enhancing the environment of the Lake Hayes/Waiwhakaata catchment.</p>	EDC25-101	Cr Forbes, Cr Wilson
Regional Pest Management Plan Effectiveness Review	<p><i>That the Committee:</i></p> <p>1) Notes this report.</p> <p>2) Recommends that Council approves the prioritisation of the recommendations to improve the effectiveness of delivery of the current and future RPMP.</p>	EDC25-102	Cr Robertson Moved, Cr Somerville Seconded
Regional Pest Management Plan Operational Plan 2025/26	<p><i>That the Committee:</i></p> <p>1) Notes this report.</p> <p>2) Recommends to Council to approve the Otago Regional Council's 2025-2026 Biosecurity Operational Plan to enact the Otago Regional Pest Management Plan 2019- 2029 and authorises the Chief Executive to correct minor errors to the 2025-2026 Biosecurity Operational Plan.</p> <p>3) Notes that the 2025-2026 Biosecurity Work Plan will be developed to deliver the 2025- 2026 Biosecurity Operational Plan, once approved.</p> <p>4) Notes that a copy of the Otago Regional Council's Regional Pest Management Plan 2025-2026 Biosecurity Operational Plan will be provided to the Minister for Biosecurity.</p> <p>5) Notes that staff will report back to Council any response from the Minister for Biosecurity.</p>	ED25-103	Cr Robertson Moved, Cr Somerville Seconded
Fresh Water Project Update	<p><i>That the Committee:</i></p> <p>1) Notes this report.</p> <p>2) Notes the progress of implementation activities that are occurring on the water quality projects delivered by the community, partners and Council, as detailed in this report.</p> <p>3) Recommends that the Council approves options 1 in regard to a funding application to MPI for further Hill Country projects.</p> <p>4) Notes the implementation plans for Lake Tuakitoto (Attachment 1: Lake Tuakitoto Implementation Plan – FINAL) and Tomahawk Lagoon (Attachment 2:</p>	EDC25-105	Cr McCall Moved, Cr Wilson Seconded

	<i>Tomohaka Tomahawk Lagoon Implementation Plan – FINAL).</i>		
Funding Agreement with MPI for Wilding Conifer and Wallaby Programmes	<p><i>That the Committee:</i></p> <p>1) Notes this report.</p> <p>2) Recommends to Council that they approve Option 1 that Council continues to act as the Recipient of funding from MPI for the National Wilding Conifer Control Programme and Tipu Mātoro Wallaby Eradication Programme in Otago.</p> <p>3) Recommends to Council that they approve the Goods and Services agreement over the period of 1 July 2025 to 30 June 2030 and Government funding of \$1,070,000 (excluding GST), or an amount similar to this if the budget is altered by MPI, over the period 1 July 2025 to 30 June 2026, for Otago’s share of the National Wilding Conifer Programme and authorises the Chief Executive to sign the agreement for and on behalf of Council if there are no significant changes.</p> <p>4) Recommends to Council that they approve the Goods and Services agreement over the period of 1 July 2025 to 30 June 2030 and Government funding of \$950,000 (excluding GST), or an amount similar to this if the budget is altered by MPI, over the period 1 July 2025 to 30 June 2026 for Otago’s share of the Tipu Mātoro National Wallaby Eradication Programme and authorises the Chief Executive to sign the agreement for and on behalf of Council if there are no significant changes.</p> <p>5) Recommends to Council that they approve Option 3 to commence delivery of works for the National Wilding Conifer Control Programme and the Tipu Mātoro National Wallaby Eradication Programme from 1 July 2025, even if there is a delay in the signing of the agreements with MPI.</p> <p>6) Recommends that the Council Notes the obligations for Council found in Schedule 2, Clause 6 of the draft Tipu Mātoro Wallaby Programme Goods and Services Agreement 2025-2030 (Attachment 1).</p>	EDC25-106	Cr Wilson Moved, Cr Malcolm Seconded
Quarterly Update on the Activities of the Regulatory Teams	<p><i>That the Committee:</i></p> <p>1) Notes this report.</p> <p>2) Recommends that Council approves the Compliance Audit and Performance Monitoring Schedule for the 2025/26 year.</p>	EDC25-108	Cr Wilson Moved, Cr Noone Seconded

Recommendation:

That the Council adopts the recommendations of the 22 May 2025 Environmental Strategy and Planning Committee.

Report	Resolution	Res#	Mover/ Second
Regional Pest Management Plan review	<p><i>That the Committee:</i></p> <ol style="list-style-type: none"> 1) Notes this report. 2) Recommends that the Council endorse the Regional Pest Management Plan Review Project Plan as submitted (Attachment 1) (Option 1). 3) Endorses staff progressing conversations with staff at all South Island Regional and Unitary Councils to explore an opportunity to develop a cross-region pest management plan (Option 1). 4) Endorses the establishment of a Councillor Reference Group to oversee the development of the renewed Regional Pest Management Plan Review (Option 1). 	ESP25-101	Cr Wilson Moved, Cr Weir Seconded
Rabbit issues in Public/Crown land	<ol style="list-style-type: none"> 1) Notes this report. 2) Recommends that Council endorse Option 1 that the Chair write a letter to the appropriate ministers highlighting the limited rabbit management on Crown/public land in Otago which has effects on private land occupiers' ability to manage rabbit populations on their land and opportunities for pest management approaches and programmes on Crown/public land. 	ESP25-103	Cr Malcolm Moved, Cr McCall Seconded

COUNCIL ACTION REGISTER – Status of Actions as at 25 June 2025

Meeting Date	Document	Item	Status	Action Required	Assignee/s	Action Taken	Due Date
19-02-2025	Council Meeting - 19 February 2025	GOV2482 Annual Plan 2025/26	Completed	CM25-109 Request a summary of expenditure and FTE and associated work programmes or deliverables for each group within ORC structure for a high level understanding in time for deliberations on 25/26 AP.	Executive Assistant - Strategy and Customer, General Manager Strategy and Customer	04/06/2025 General Manager Strategy and Customer Activity snapshots with high level opex spend, FTE spend and key projects under each activity were shared with councillors ahead of Finance Committee deliberations. Feedback was sought on the format, and these will be further refined and then finalised to help inform Year 2's activity.	27-05-2025
19-03-2025	Council Meeting - 19 March 2025	GOV2466 Report on implications of changes to the RMA in relation to Land and Water	Completed	CM25-139 Requests that staff prepare a draft response to the Minister for the Environment. Directs staff to work with officials at the Ministry for the Environment to identify the necessary legislative amendments, should the Minister be supportive of this approach. Delegates approval of the request to the Minister for the Environment to the Chair of Council and Chief Executive.	Executive Assistant - Regional Planning and Transport, General Manager Planning and Transport	04/06/2025 General Manager Strategy and Customer Letter sent to Minister Simmonds on 24 March 2025, responses received on 14 April and 21 May 2025.	31-07-2025
22-03-2023	Council Meeting 2023.03.22	GOV2306 Proposal to participate in CouncilMARK programme	Completed	CM23-130 Report to come to the July 2025 Council Meeting on progress of the implementation of actions to address priority recommendations in the quarterly transformation updates.	Chief Executive, Executive Assistant - Corporate Services, General Manager Strategy and Customer	04/06/2025 General Manager Strategy and Customer Report in progress to be presented to July Council Meeting as requested. 04/06/2025 General Manager Strategy and Customer Closing this action as has been overtaken by CM25-117, where the July report back is reported against.	9-07-2025
19-02-2025	Council Meeting - 19 February 2025	GOV2482 Annual Plan 2025/26	Completed	CM25-108 Directs Council staff to begin community consultation on the proposed changes to the Otago Regional Council Fees and Charges.	Executive Assistant - Strategy and Customer, General Manager Strategy and Customer	04/06/2025 General Manager Strategy and Customer Consultation on the proposed fees and charges was undertaken from 17 March - 15 April 2025. 04/06/2025 General Manager Strategy and Customer Consultation on the proposed fees and charges was undertaken from 17 March - 15 April 2025.	27-05-2025
28-08-2024	Council Meeting - 28 August 2024	POL2419 Waitaki River Update	Completed	CM24-167 Notes a further update will be provided in 2025, after the early engagement has been undertaken;	Executive Assistant - Regional Planning and Transport, General Manager Planning and Transport	02/05/2025 Governance Support Officer Paper presented to 2025.04.09 Council , the working group are to consider the implications of the proposed Resource Management reform on the Waitaki review and report back to Council. 04/06/2025 General Manager Strategy and Customer Overtaken by CM25-150 and next steps will be reported against this resolution. This action to be closed, following report to Council on 9 April 2025.	1-06-2025
19-02-2025	Council Meeting - 19 February 2025	GOV2482 Annual Plan 2025/26	Completed	CM25-107 Directs Council staff to begin community consultation on the proposed adjustments to the Long-Term Plan 2024-34.	Executive Assistant - Strategy and Customer, General Manager Strategy and Customer	04/06/2025 General Manager Strategy and Customer Consultation on adjustments to the Long-term Plan / Annual Plan 2025/2026 was undertaken from 17 March - 15 April 2025.	27-05-2025

COUNCIL ACTION REGISTER – Status of Actions as at 25 June 2025

Meeting Date	Document	Item	Status	Action Required	Assignee/s	Action Taken	Due Date
29-05-2024	Finance Committee LTP Deliberations - 29&30 May 2024	CS2421 Long-Term Plan 2024-2034 Deliberation	In Progress	FIN24-149: 50) Requests that staff research and report on alternative community ownership models for flood and drainage schemes as a way of addressing financial unsustainability.	General Manager Finance, General Manager Science and Resilience	16/10/2024 General Manager Finance Underway. Staff are considering the best approach for this work and will report back to Council early in 2025 along with FIN24-120. 31/03/2025 Executive Assistant, Operations Staff will bring an update to Council mid 2025.	27-06-2025
29-05-2024	Finance Committee LTP Deliberations - 29&30 May 2024	CS2421 Long-Term Plan 2024-2034 Deliberation	In Progress	FIN24-120: 44) Requests staff undertake a review of all flood and drainage schemes to inform rate allocation and report back to Council on the Terms of Reference and timing for this review	Chief Executive, Executive Assistant, Operations, General Manager Finance, General Manager Science and Resilience	11/10/2024 Governance Support Officer 10/10/24 CE Underway. Staff are considering the best approach for this work and will report back to Council early in 2025. 31/03/2025 Executive Assistant, Operations Review planned to be completed by the 2027 Long Term Plan. 18/06/2025 Governance Support Officer 18/06/2025 Work has commenced	16-12-2024
29-05-2024	Finance Committee LTP Deliberations - 29&30 May 2024	CS2421 Long-Term Plan 2024-2034 Deliberation	In Progress	FIN24-138: 32) Directs Council staff to make the following adjustments to the draft Long-Term Plan 2024-2034 detailed in paper 6.1.2 and including: d. Investigate within existing year one forecast budgets the feasibility of incorporating an Oamaru-Dunedin service within the 'Oamaru year two and three public transport trial.	General Manager Planning and Transport	04/06/2025 General Manager Planning and Transport This investigation work will be undertaken alongside regional connectivity work for Balclutha and Central Otago, in the next financial year, subject to resourcing.	27-06-2025
29-05-2024	Finance Committee LTP Deliberations - 29&30 May 2024	CS2421 Long-Term Plan 2024-2034 Deliberation	In Progress	FIN24-137: 32) Directs Council staff to make the following adjustments to the draft Long-Term Plan 2024-2034 detailed in paper 6.1.2 and including: c. Allocate \$50,000 in Year two Long-Term Plan 2024-2034 for potential sponsorship of the activity outlined in 'Dunedin Tracks and Trails' submission or other activity that would deliver on the Public and Active Transport Connectivity Strategy.	General Manager Planning and Transport, General Manager Science and Resilience	04/06/2025 General Manager Strategy and Customer \$50,000 allocated for Year 2. Discussions underway with the Trust to determine how it is to be used.	27-06-2025
29-05-2024	Finance Committee LTP Deliberations - 29&30 May 2024	CS2421 Long-Term Plan 2024-2034 Deliberation	In Progress	FIN24-139: 32) Directs Council staff to make the following adjustments to the draft Long-Term Plan 2024-2034 detailed in paper 6.1.2 and including: g. Requests that staff complete a review of options for the allocation of Public Transport targeted rates and report back in time for the 25/26 annual plan.	General Manager Finance, General Manager Planning and Transport	16/10/2024 General Manager Finance In progress. Staff will provide an update and proposed next steps in the Annual Plan 2025-26 workshop on 30-Oct-2024. 09/06/2025 General Manager Finance Covered in Workshop on 30-Oct-2024. Not reviewing PT rates in Annual Plan 2025-26 and will look at reviewing and consulting outside of Annual Plan for potential changes if any in Year 3 or next LTP.	6-12-2024
19-02-2025	Council Meeting - 19 February 2025	GOV2513 Te Korowai Evaluation Report	In Progress	Resolution CM25-117 Asks the Chief Executive to present a programme of business transformation to the July Council Meeting that will include options for prioritised areas of improvement listed in Te Korowai Evaluation report.	Chief Executive, Executive Assistant - Corporate Services	01/04/2025 Governance Support Officer This is on the work programme for the new Organisational Performance and Planning Team and will be reported back on as per the agreed timeframe.	9-07-2025

COUNCIL ACTION REGISTER – Status of Actions as at 25 June 2025

Meeting Date	Document	Item	Status	Action Required	Assignee/s	Action Taken	Due Date
19-03-2025	Council Meeting - 19 March 2025	GOV2521 ORC Review of Committee Structure, Terms of Reference, Delegations	In Progress	<p>CM25-146</p> <p>Considers the discussion on delegations for committees and:</p> <p>Directs Co-Chairs and Senior Officers to consider downstream decisions for their respective committees over the next six months and where these would be best taken, to inform a further report to Council in September 2025 that makes recommendations to the incoming Council.</p> <p>Directs the Chair and Chief Executive to discuss delegations in further detail with mana whenua and iwi appointees, to inform a further report to Council in September 2025, that makes recommendations to the incoming Council.</p>	Chairperson, Chief Executive, Executive Assistant - Corporate Services, Manager Executive Advice	14/05/2025 Governance Support Officer The committee Terms of Reference and Delegations have been updated. The new committee structure is in place.	1-09-2025
19-03-2025	Council Meeting - 19 March 2025	GOV2521 ORC Review of Committee Structure, Terms of Reference, Delegations	In Progress	<p>CM25-145 Directs the Chair and Chief Executive to discuss the changes with mana whenua, and iwi appointees to committees to determine the best alignment for iwi appointees to the new committees, and seek input on the revised structure and terms of reference ahead of the 2025 triennial elections</p> <p>Requests a report back to Council in September 2025 with views from Co-Chairs, Senior Officers, mana whenua and iwi representatives about the committee structure and terms of reference, in order to make a recommendation to the incoming Council.</p>	Executive Assistant - Strategy and Customer, General Manager Strategy and Customer	04/06/2025 General Manager Strategy and Customer Preliminary discussion at Mana to Mana on 20 May, and a follow up letter is planned to seek input.	1-09-2025
9-04-2025	Council Meeting - 9 April 2025	GOV2544 Waitaki Update	In Progress	CM25-150 Requests that staff provide an update to all parties who have been involved in this project to date on the decision made by ORC and next steps in the process.	Executive Assistant - Regional Planning and Transport, General Manager Planning and Transport	04/06/2025 General Manager Planning and Transport The working group is developing joint messaging to go to all parties involved to date.	30-06-2025
9-04-2025	Council Meeting - 9 April 2025	GOV2552 ORC Membership Representation Review - Determination Outcome	In Progress	<p>CM25-151: Notes the Local Government Commission has recommended Council looks at the population data in 2027 to see whether an out of cycle representation review may be justified.</p> <p>Notes that the staff will bring a paper in 2027 to Council to provide advice on this issue.</p>	Executive Assistant - Strategy and Customer, General Manager Strategy and Customer	04/06/2025 General Manager Strategy and Customer Noted for 2027 work programme.	1-03-2027

9.1. Chief Executive's Report

Prepared for: Council

Activity: Governance Report

Author: Richard Saunders, Chief Executive

Date: 25 June 2025

PURPOSE

- [1] This report provides Council with an overview of Otago Regional Council's key projects, financial performance and progress against our levels of service. It also addresses a resolution of Council from the recent Annual Plan deliberations.

EXECUTIVE SUMMARY

- [2] The Annual Plan process has concluded with Councillors due to approve a 5.5% rates increase, down from a proposed increase of 13.8% in Year Two of the Long Term Plan (LTP).
- [3] At the end of May there are twelve measures being reported as off track and four measures being reported as at risk. Thirty-seven measures remain on-track for delivery in accordance with the targets set.
- [4] At the end of May 2025 ORC is reporting an operating surplus of \$13.06m against a budgeted surplus of \$2.97m, a positive variance of \$10.08m. Revenue is \$3.90m ahead of budget and expenditure is \$1.16m below budget.
- [5] Staff have considered the process for undertaking a review of the managed fund to identify opportunities for investment into pest management and control. No additional funding is required to undertake this work within the 2025/26 work programme.

RECOMMENDATION

That the Council:

- 1) **Notes** this report.
- 2) **Notes** that no additional funding is required in the 2025/26 annual plan for the delivery of an investigation into using funds from the managed fund to increase ORC's contribution to pest management and control.

DISCUSSION

Annual Plan 2025/26

- [6] Council is to consider adopting the Annual Plan (2025-26) at its 25 June meeting. Following deliberations, operating expenditure has reduced by \$3.324 million from the

LTP year two estimate, with a total operating expenditure of \$140.634 million planned for the Annual Plan 2025-26.

- [7] The associated rates requirement for the Annual Plan 2025-26 is \$68.467 million, which is a reduction of \$5.357 million (-8.3%) against the estimated LTP year two rates, while also reflecting an increase of \$3.574 million (5.5%) against the current year 2024-25 (LTP year one).
- [8] The proposed \$3.87m reduction includes \$1.2m in transport rates, \$1m in freshwater implementation and integrated catchment management resourcing, an approximate \$500k reduction through general efficiency savings and a reduction in inflation.
- [9] Although the Annual Plan 2025-26 largely reflects the work programmes as consulted and agreed in year two of the Long-term Plan (LTP), there are some adjustments.
- [10] Notable changes include removal of some Transport work because of reduced government co-funding, the addition of contracted Transport costs not included in the LTP, the re-scheduling of Land and Water planning work to reflect central government direction, amended Air plan and Air Strategy timing as a result of Council decision, and the timing of some flood protection and drainage work.

Council Request for Investigation into Managed Fund for Pest Management

- [11] During annual plan deliberations Council passed a resolution requesting that staff provide a report on how to fund an investigation into using the managed fund to increase ORC's contribution to pest management and control for the June 2025 Council meeting.
- [12] Having reviewed the work required to deliver this investigation staff can confirm that no additional funding will be required in the 2025/26 annual plan budget. The General Manager Finance will provide a full briefing on the managed fund and provide options on next steps for Council. This will be completed within existing budgets in the new triennium.

Non-financial Levels of Service

- [13] Attachments 1 and 2 show the results for the non-financial levels of service contained in the LTP. At the end of May there are twelve measures being reported as off track and four measures being reported as at risk. Thirty-seven measures remain on-track for delivery in accordance with the targets set.
- [14] The off-track (red) measures relate to response times for official information requests, delivery of the biannual community engagement survey report back, a range of regional planning processes, and public transport punctuality.
- [15] At-risk measures (yellow) have remained constant compared to the previous month's reporting, with those remaining being in the delivery and timeframes associated with

Biosecurity Operational Plan activities, natural hazard adaption plan progress and capacity and capability of staff to support the coordination of a region-wide emergency response.

- [16] A number of transport targets cannot be measured until Q4, so are not assessed in the preceding months.

Customer Experience

- [17] The Customer Experience team handled 5,217 enquiries during the month of May, slightly below the 12-month average of 5,738 customer contact points. Customer satisfaction remains high at 92% but decreased slightly from April (95%).
- [18] Year on year total customer interactions were up 9% from May 2024.
- [19] The most common enquiries for May were interactions based on the Facebook campaigns (e.g. wood moisture meter competition), routine enquiries regarding rates and transport and total mobility calls.

Financial Performance

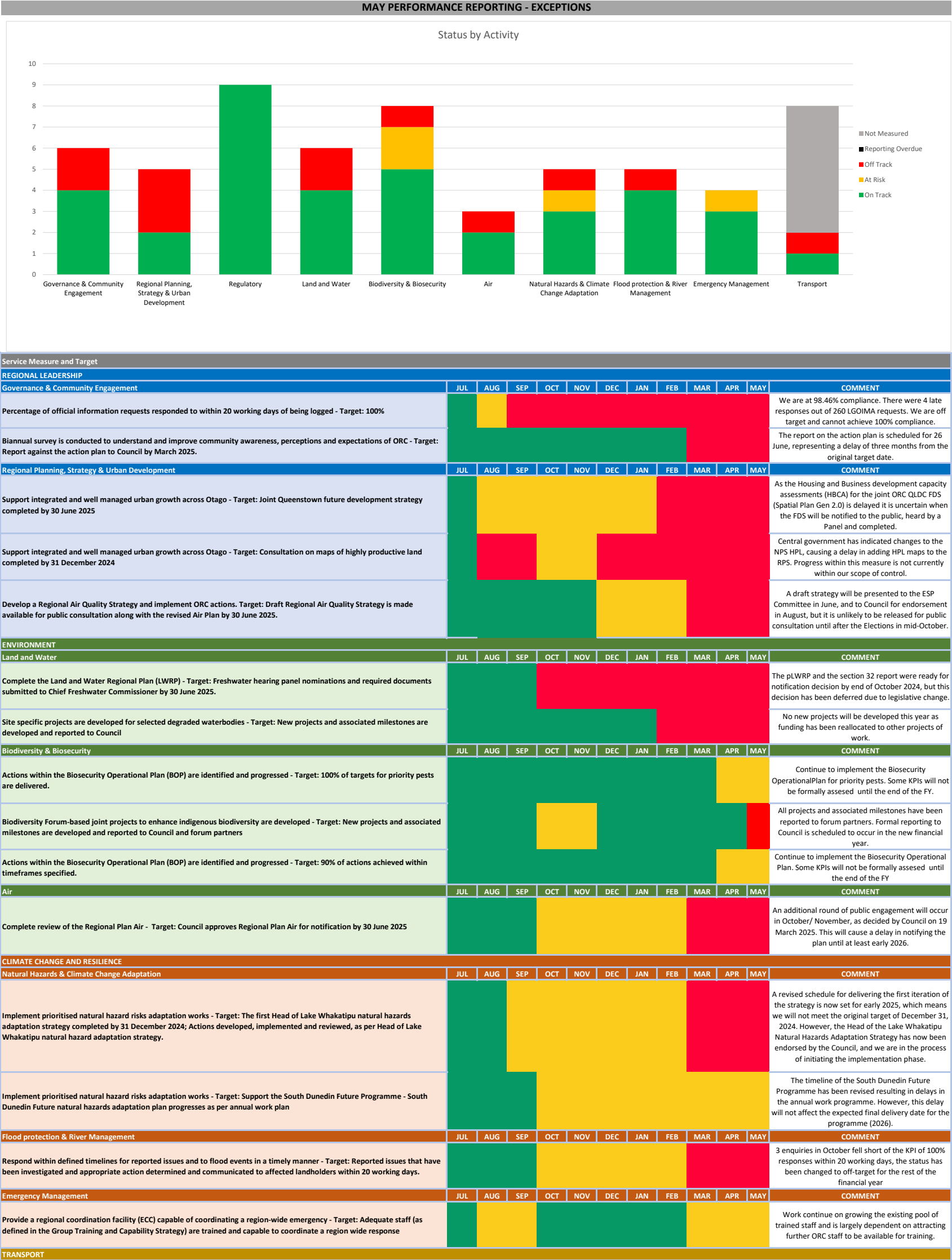
- [20] The statement of comprehensive revenue and expenditure (SCRE) is included as Attachment 4 and the statement of financial position is included as Attachment 5.
- [21] At the end of May 2025 ORC is reporting an operating surplus of \$13.06m against a budgeted surplus of \$2.97m, a positive variance of \$10.08m. Revenue is \$3.90m ahead of budget and expenditure is \$1.5m below budget. The organisation is currently forecasting an underlying surplus of \$1.69m at year end which accounts for the transport reserve repayments and receipt of funds for the sale of the Birch/Kitchener site.
- [22] The gain on sale for Birch / Kitchener which was included in the 23/24 budget but realised this year, accounts for \$4.550m of the surplus. Additionally, \$1.5m and \$385k of surplus are allocated to the Dunedin and Queenstown transport deficits respectively.
- [23] At this stage of the financial year there are no risks to raise with Council. Expenditure is being carefully managed and full financial reporting including quarter three forecasting will be reported to the Finance Committee this week.
- [24] The statement of financial position demonstrates that ORC is continuing to maintain a strong balance sheet that enables us to meet our financial obligations as they fall due.

OPTIONS

- [25] As this is a report for noting there are no options to consider.

ATTACHMENTS

1. May Performance Reporting - Exceptions 1 [**9.1.1** - 2 pages]
2. May Performance reporting - Summary 1 [**9.1.2** - 3 pages]
3. 3 May 2025 Customer Report [**9.1.3** - 2 pages]
4. 5 May SCRE 2025 [**9.1.4** - 1 page]
5. 4 May Balance Sheet 2025 [**9.1.5** - 1 page]



Transport	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	COMMENT
Percentage of scheduled services on-time (punctuality – to five minutes) - Target: 95%												Services are heavily affected in both Dunedin and Queenstown by extensive roadworks, road closures and heavy congestion. It is unlikely targets will be achieved.
Overall passenger satisfaction with Dunedin Public Transport system at annual survey - Target: Maintain or increase 3 yr rolling average >=90%												The next survey will take place in Q4 2025.
Annual public transport boardings in Queenstown - Target: Increase												The next survey will take place in Q4 2025.
Annual public transport boardings in Dunedin - Target: increase												The next survey will take place in Q4 2025.
Overall passenger satisfaction with Whakatipu Public Transport system at annual survey - Target: Maintain or increase 3yr rolling average >=90%												Annual survey to be completed in Q4
Percentage of users who are satisfied with the provision of timetable and services information - Target: Maintain or increase 3 yr rolling average >=90%												Surveys are completed in Q4 - Targets are expected to be achieved.
Percentage of users who are satisfied with the overall service of the Total Mobility scheme- Target: Maintain or increase 3 yr rolling average >=90%												Surveys are done in Q4. We expect to achieve the target.

On Track

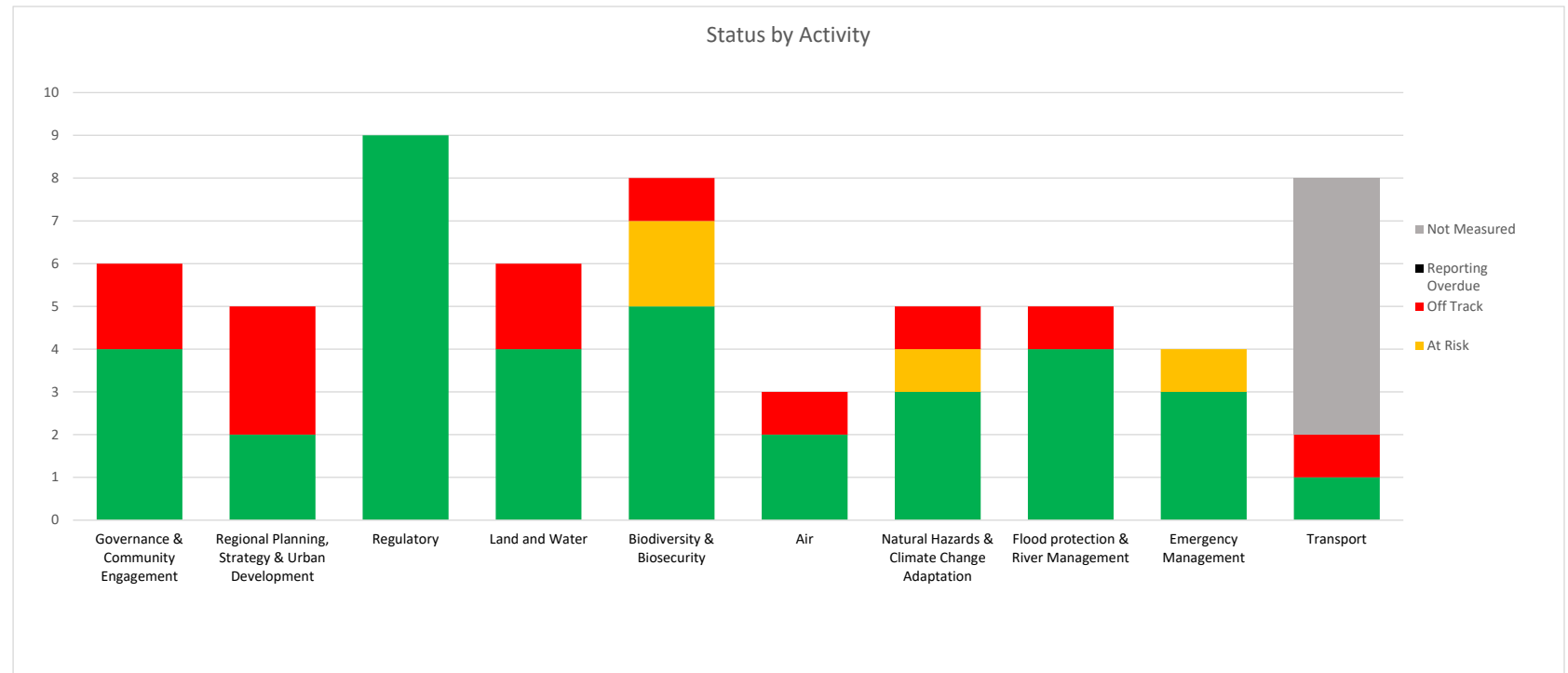
At Risk

Off Track

Reporting Overdue

Not Measured

MAY PERFORMANCE REPORTING - SUMMARY



Service Measure and Target												
REGIONAL LEADERSHIP												
Governance & Community Engagement	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	
Percentage of official information requests responded to within 20 working days of being logged - Target: 100%												
Deliver our Long-Term Plan, annual reviews of the LTP, and reporting of performance against plan as per the statutory requirements - Target: Annual Plan adopted by council prior to 30 June 2025												
Percentage of council agendas are publicly available two working days or more before a meeting - Target: 100%												
Biannual survey is conducted to understand and improve community awareness, perceptions and expectations of ORC - Target: Report against the action plan to Council by March 2025.												
Customers express high levels of satisfaction with customer service provision - Target: Develop Customer Policy to determine satisfaction levels												
Increase opportunities for engagement with diverse groups across Otago to lift awareness and understanding of the work of the regional council and seek feedback on performance Target: Create and implement engagement plan and establish engagement data												
Regional Planning, Strategy & Urban Development	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	
Support integrated and well managed urban growth across Otago - Target: Joint Queenstown future development strategy completed by 30 June 2025												
Support integrated and well managed urban growth across Otago - Target: Consultation on maps of highly productive land completed by 31 December 2024												
Develop a regional biodiversity strategy and implement ORC actions. Target: Draft regional biodiversity strategy is made available for public consultation by 30 June 2025												
Develop a Regional Air Quality Strategy and implement ORC actions. Target: Draft Regional Air Quality Strategy is made available for public consultation along with the revised Air Plan by 30 June 2025.												
Develop a Regional Climate Change Strategy and implement ORC actions -Target: ORC actions from the Regional Climate Change Strategy are implemented, and the effectiveness of the strategy is monitored and reported to Council annually.												
Regulatory	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	
Maintain 24-hour/7 day a week response for environmental incidents - Target: Pollution hotline staff available/on call 24/7												
Maintain 20 appropriately trained responders for maritime oil pollution incidents -Target: 20 responders attend 3 exercises per year												
Percentage of resource consent applications processed in accordance with Resource Management Act 1991 legislative timeframes - Target: ≥98%												
Percentage of performance monitoring returns completed each year, as per the Compliance Audit and Performance Monitoring Schedule targets - Target: ≥90%												
Percentage of significant non-compliance identified where action is taken in accordance with Compliance Policy - Target: 100%												
Percentage of programmed inspections/audits completed each year, as per the Compliance Audit and Performance Monitoring Schedule targets - Target: ≥90%												
Maintain compliance with Port and Harbour Marine Safety Code - Target: External review is completed and deemed to be code consistent.												
The safety campaign for recreational 'boaters' is delivered - Target: 80% achieved												
Percentage of public enquiries for consent information completed within 10 working days - Target: Maintain or increase												
ENVIRONMENT												

Land and Water	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Complete the Land and Water Regional Plan (LWRP) - Target: Freshwater hearing panel nominations and required documents submitted to Chief Freshwater Commissioner by 30 June 2025.											
ORC led and community/landowner supported workshops and events are delivered which promote best practice land management for soil conservation, water quality and/or the efficient use of water. Target: At least 12 ORC led workshops or events are delivered annually											
Site specific projects are developed for selected degraded waterbodies - Target: New projects and associated milestones are developed and reported to Council											
Site specific projects are developed for selected degraded waterbodies - Target: Project actions have been progressed as scheduled (>80%)											
Catchment Action Plans (CAPs) give effect to the ICM programme and are developed in partnership with iwi and in collaboration with the community. Target: One Catchment Action Plan (CAP) to be presented to Council for approval by 30 June 2025											
Report the results of environmental monitoring for freshwater, land use, estuarine, and regional coastal environments. Target: Annual report for each of the 4 environments to Council prior to 30 June 2025.											
Biodiversity & Biosecurity	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Actions within the Biosecurity Operational Plan (BOP) are identified and progressed - Target: 100% of targets for priority pests are delivered.											
Externally funded biosecurity projects/programmes are implemented as per their agreements - Target: 90% of deliverables in the agreements with Central Government are progressing as scheduled											
Biodiversity Forum-based joint projects to enhance indigenous biodiversity are developed - Target: New projects and associated milestones are developed and reported to Council and forum partners											
Joint projects are implemented against milestones - Target: Project actions have been progressed as scheduled (>80%)											
Alignment between initiatives and deliverables receiving Council funding, and Council's strategic biodiversity strategic objectives - Target: 80% alignment											
Externally funded freshwater projects/programmes are delivered as per their agreements - Target: 90% of deliverables in the agreements with Central Government are progressing as scheduled											
Report the results of environmental monitoring for regional indigenous biodiversity ecosystems - Target: Annual report completed prior to 30 June 2025											
Actions within the Biosecurity Operational Plan (BOP) are identified and progressed - Target: 90% of actions achieved within timeframes specified.											
Air	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Implement a regional air monitoring programme - Target: Annual report on monitoring programme completed and reported to Council											
Report the results of environmental monitoring for air. - Target: Annual report for air monitoring for previous financial year reported to Council by 30 Sept 2024. Note: ≥95% = achieved											
Complete review of the Regional Plan Air - Target: Council approves Regional Plan Air for notification by 30 June 2025											
CLIMATE CHANGE AND RESILIENCE											
Natural Hazards & Climate Change Adaptation	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Natural hazards information is available via the web-based Otago Natural Hazards Database - Target: Database is accessible and up-to-date 100% of the time											
Percentage of flood warnings that are issued in accordance with the flood warning manual - Target: 100%											
Implement the findings of the regional natural hazards risk assessment and inform adaptation planning and implementation - Target: Implementation and additional assessments of natural hazards and risks based on the findings of the Otago Natural Hazards Risk Assessment. Phased delivery Yr 1 to 10											
Implement prioritised natural hazard risks adaptation works - Target: The first Head of Lake Whakatipu natural hazards adaptation strategy completed by 31 December 2024; Actions developed, implemented and reviewed, as per Head of Lake Whakatipu natural hazard adaptation strategy.											
Implement prioritised natural hazard risks adaptation works - Target: Support the South Dunedin Future Programme - South Dunedin Future natural hazards adaptation plan progresses as per annual work plan											
Flood protection & River Management	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Percentage of scheme renewals programme: Major flood protection and control works are maintained, repaired, and renewed to the key standards defined in relevant planning documents. - Target: > 85% of renewal programmes completed											
Percentage of scheme maintenance programme: Major flood protection drainage and control works are maintained, repaired, and renewed to the key standards defined in relevant planning documents. - Target: > 85% of planned maintenance programme completed											
Percentage of planned maintenance programme: Channel works are maintained, repaired, and renewed to the key standards defined in relevant planning documents - Target: >85% of planned maintenance programme completed											
Respond within defined timelines for reported issues and to flood events in a timely manner - Target: Flood repair programme: Damage identified, prioritised and a repair programme is made available to affected communities within 3 months of the event/100%.											
Respond within defined timelines for reported issues and to flood events in a timely manner - Target: Reported issues that have been investigated and appropriate action determined and communicated to affected landholders within 20 working days.											

Emergency Management	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Emergency Management Otago staff are available to respond 24/7 to a Civil Defence emergency - Target: Maintain a duty roster for 24/7 365 coverage for initial responses to Civil Defence emergencies											
Provide a regional coordination facility (ECC) capable of coordinating a region-wide emergency - Target: An appropriate facility as defined in the CDEM Partnership Agreement is available for immediate activation.											
Support is provided to Emergency Management Otago to fulfil Otago CDEM Group requirements as defined in the CDEM Act and CDEM - Target: Fulfil all requirements as the administering authority and the Otago CDEM Partnership Agreement											
Provide a regional coordination facility (ECC) capable of coordinating a region-wide emergency - Target: Adequate staff (as defined in the Group Training and Capability Strategy) are trained and capable to coordinate a region wide response											
TRANSPORT											
Transport	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Percentage of scheduled services on-time (punctuality – to five minutes) - Target: 95%											
Overall passenger satisfaction with Dunedin Public Transport system at annual survey - Target: Maintain or increase 3 yr rolling average >=90%											
Annual public transport boardings in Queenstown - Target: Increase											
Annual public transport boardings in Dunedin - Target: Increase											
Percentage of scheduled services delivered (reliability) - Target: 95%											
Overall passenger satisfaction with Whakatipu Public Transport system at annual survey - Target: Maintain or increase 3yr rolling average >=90%											
Percentage of users who are satisfied with the provision of timetable and services information - Target: Maintain or increase 3 yr rolling average >=90%											
Percentage of users who are satisfied with the overall service of the Total Mobility scheme- Target: Maintain or increase 3 yr rolling average >=90%											

On Track

At Risk

Off Track

Reporting Overdue

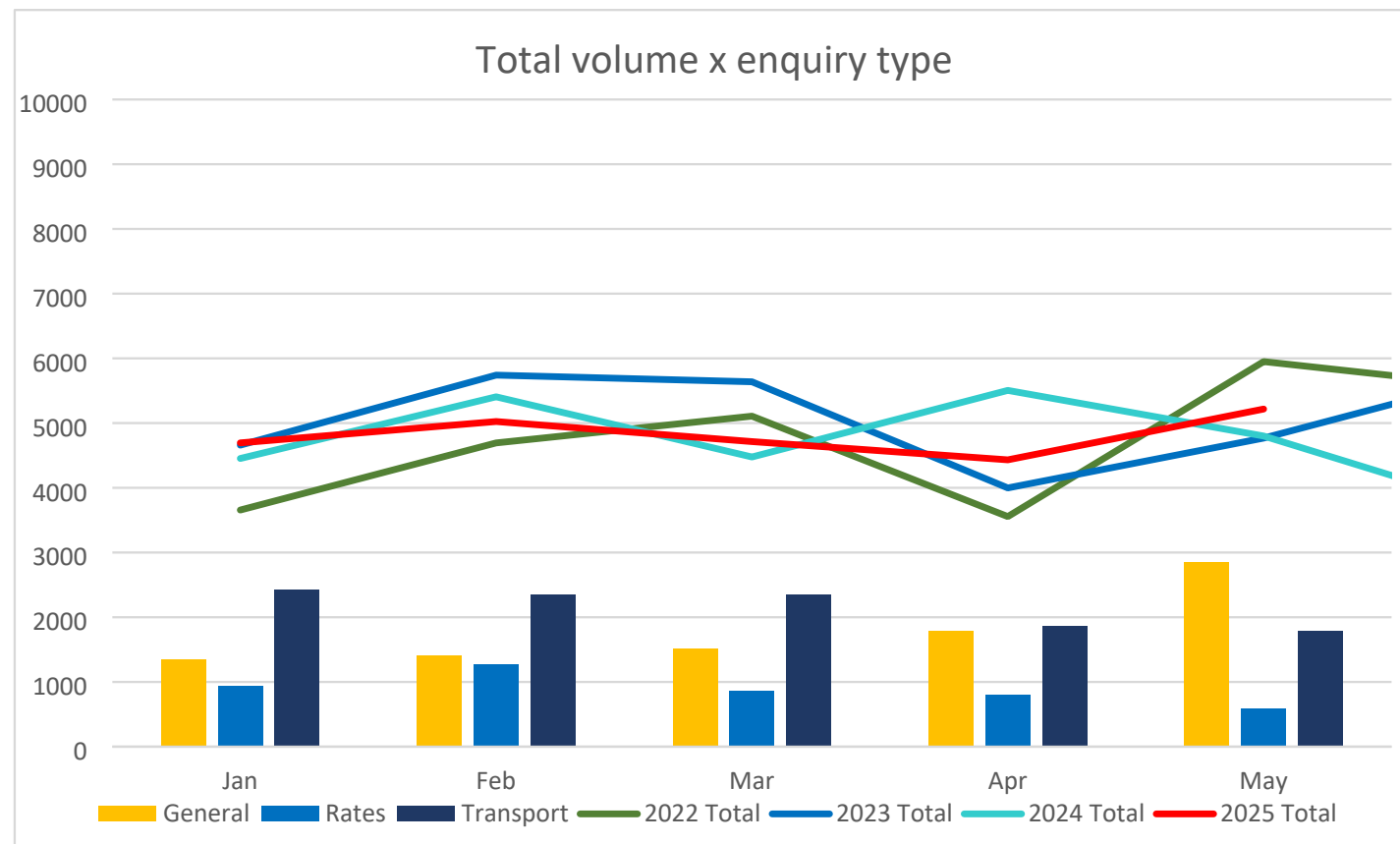
Not Measured

May 2025 Customer Report

Rolling 12-month customer volume average is 5738 per month

May customer volume total: **5217**

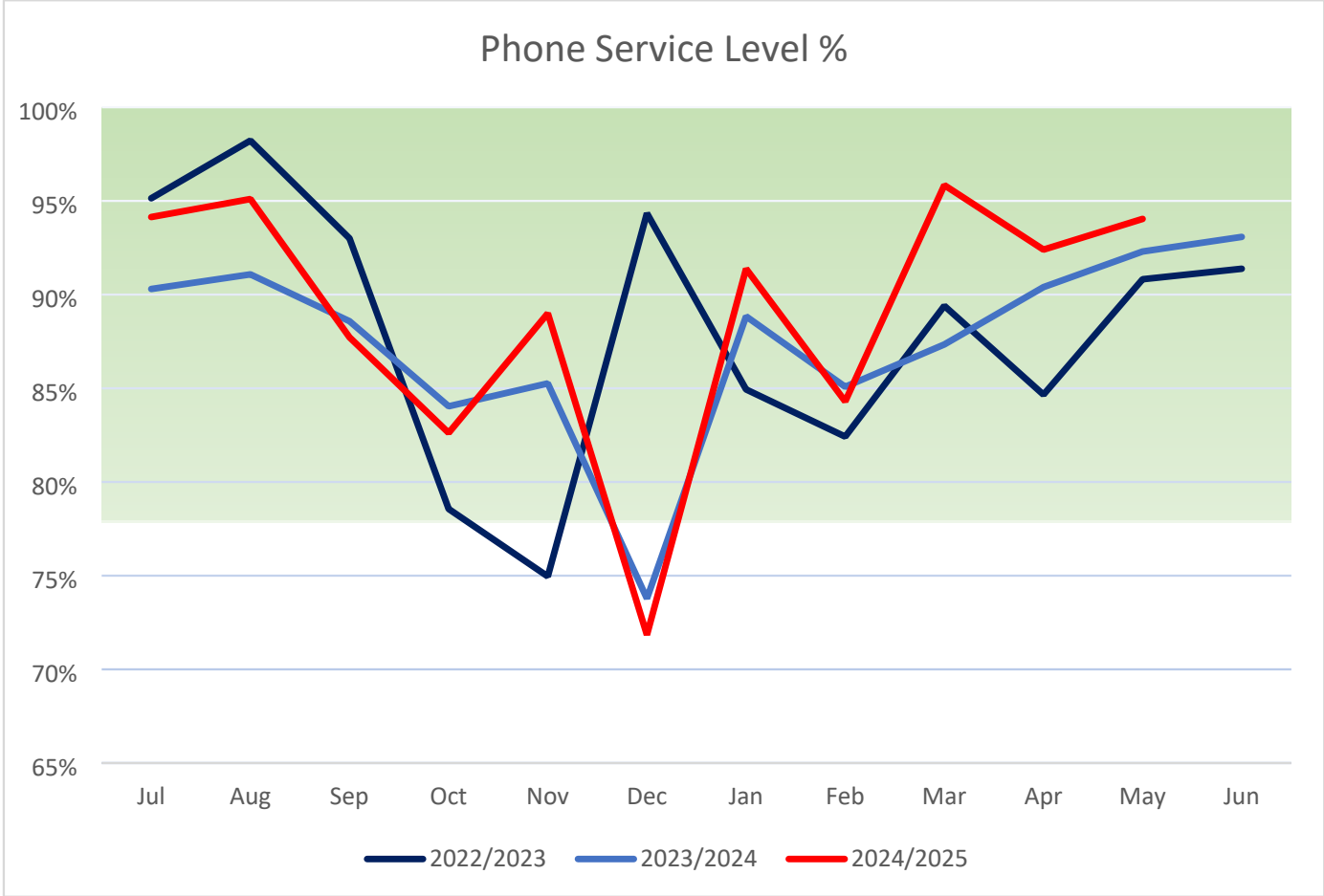
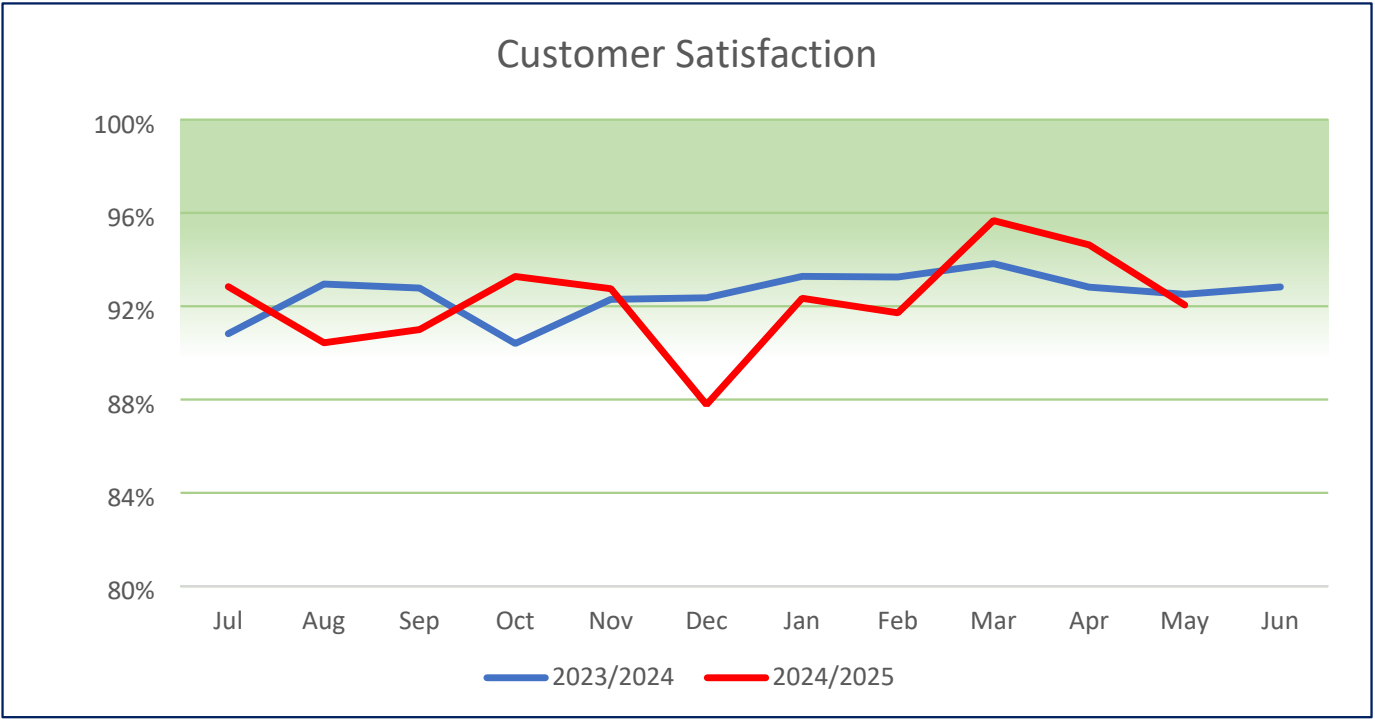
(reception = 218, phone = 1727, email = 1368, social 1655, afterhours = 249)



- Total customer interactions were up this month by 17% (785) (up 9%/417 on May 2024)
- Customer sentiment tracking was neutral.
- Total service level for all calls was 94%
- Total customer satisfaction rating decreased to 92%

Enquiry themes for May:

- Facebook – moisture meter campaign drove high volume of interaction/comment
- Rates - mortgage collection and routine enquiries
- Bus enquiries are routine
- Total mobility calls (checking cards and regular BAU)





STATEMENT OF COMPREHENSIVE REVENUE AND EXPENSE FOR THE PERIOD ENDING 31 MAY 2025

	May 2025	May 2025	Variance	2025	2025	Variance
	Actual	Budget	Actual	Forecast	Budget	Forecast
Revenue	Year to Date	Year to Date	Year to Date	Full Year	Full Year	Full Year
Revenue from non-exchange transactions						
Rates Revenue	59,677	59,485	192	65,088	64,893	195
Grant revenue and subsidies	20,483	18,797	1,686	23,940	21,991	1,949
Other Revenue non exchange	9,481	6,362	3,119	11,288	10,856	432
Revenue from exchange transactions						
Interest and investment revenue	8,277	10,169	(1,892)	8,244	9,765	(1,521)
Dividends	16,964	16,500	464	18,396	18,000	396
Other Revenue Exchange	5,731	5,396	335	5,923	3,644	2,279
Total Revenue	120,613	116,709	3,904	132,879	129,149	3,730
Expenditure						
Employee benefits expense	35,967	36,277	(310)	39,641	39,575	66
Depreciation and amortisation	3,540	3,027	513	3,807	3,302	505
Finance Costs	7,430	8,639	(1,209)	8,636	9,424	(788)
Other Expenses	66,661	67,160	(499)	81,238	78,759	2,479
Total Expenditure	113,598	115,103	(1,505)	133,322	131,060	2,262
Other gains/(losses)						
Other (gains)/losses	6,046	1,369	4,677	6,274	1,493	4,781
Total Other gains/(losses)	6,046	1,369	4,677	6,274	1,493	4,781
Operating Surplus/(deficit)	13,061	2,975	10,086	5,831	(418)	6,249
Fair value gain/loss on shares in subsidiary	0	0	0	28,156	28,156	0
Total Comprehensive Revenue and Expense	13,061	2,975	10,086	33,987	27,738	6,249
Operating Surplus/(deficit)- as per SCRE above	13,061	2,975	10,086	5,831	(418)	6,249
Less:						
Birch/Kichener gain on sale (budgeted in 2023/24 year)	4,550	0	4,550	4,550	0	4,550
Transport Rates Deficit - Dunedin	1,659	1,659	0	1,810	1,810	0
Transport Rates Deficit - Whakatipu	424	424	0	463	463	0
Underlying Surplus/(Deficit)	6,428	892	5,536	(992)	(2,691)	1,699



STATEMENT OF FINANCIAL POSITION - ANNUAL REPORT

AS AT 31 MAY 2025

	May 2025	June 2024	Year to Date	June 2025
	Actual	Prior Year Actual	Variance	Budget
	\$000s	\$000s	\$000s	\$000s
Assets				
CURRENT ASSETS				
Cash and cash equivalents	17,868	13,605	4,264	2,455
Trade and other receivables	20,080	17,139	2,941	18,180
Property held for sale	0	3,350	(3,350)	0
Current related party receivable	34,483	38,480	(3,997)	0
Other financial assets	29,411	27,284	2,127	29,181
Other Current Assets	1,784	1,559	225	1,433
Borrower Notes	125	0	125	0
Total Current Assets	103,752	101,417	2,335	51,249
NON-CURRENT ASSETS				
Shares in subsidiary	732,720	732,720	0	780,239
Property, plant and equipment	103,995	96,011	7,984	109,835
Intangible assets	179	558	(379)	2,025
Non current related party receivable	92,832	75,198	17,634	150,088
Investment Property	16,850	16,850	0	17,134
Borrower Notes	500	500	0	500
Total Non-current Assets	947,076	921,837	25,239	1,059,821
Total Assets	1,050,828	1,023,254	27,574	1,111,070
Liabilities				
CURRENT LIABILITIES				
Trade and other payables	22,282	20,281	2,001	22,594
Employee entitlements	2,948	3,293	(345)	2,716
Borrowings	44,623	48,359	(3,736)	69,878
Total Current Liabilities	69,853	71,933	(2,080)	95,188
NON-CURRENT LIABILITIES				
Non current borrowings and other financial liabilities	107,832	90,528	17,304	110,438
Total Non-current liabilities	107,832	90,528	17,304	110,438
Total Liabilities	177,685	162,461	15,224	205,626
NET ASSETS (Assets minus Liabilities)	873,143	860,793	12,350	905,444
Equity				
PUBLIC EQUITY				
Public Equity	114,817	102,467	12,350	120,576
Total Public Equity	114,817	102,467	12,350	120,576
RESERVES				
Reserves	758,326	758,326	0	784,868
Total Reserves	758,326	758,326	0	784,868
Total Equity	873,143	860,793	12,350	905,444

9.2. Chairperson's Report

Prepared for: Council

Author: Gretchen Robertson, Chairperson

Date: 25 June 2025

MEETINGS ATTENDED

Meetings attended during the period:

26 May: QLDC + ORC – Public and Active Transport Advisory Group

28 May: Port Otago Statement of Corporate Intent presentation

30 May: DCC + ORC - Public and Active Transport Advisory Group

31 May: Unutai e! Unutai e!: Opening invitation - Art gallery opening

<https://dunedin.art.museum/exhibitions/present/unutai-e-unutai-e/>

6 June: Regional Sector Mayors and Chairs Monthly Online Catch-up

12 June: CDEM Joint Committee (Online)

<https://www.otagocdem.govt.nz/media/czij4jah/20250612-cdem-joint-committee-agenda-including-late-paper.pdf>

13 June: Otago Mayoral Forum and Te Rōpū Taiao Otago (Online)

<https://otagomayors.org.nz>

19 June: DCC, ORC & the NZ Police update with the Central City Safety Advisory Group Chair (NZ Police Otago Coastal area prevention manager, Sam Ramsey)

Letters Sent/Received

Incoming:

- **20 May – Min Chris Bishop, Bus Egress.**
- **21 May – Min Penny Simmonds, Addressing Issues Within Current Regional Plan Water, Otago.**
- **21 May – Ministry of Disabled People, Public Transport in NZ**

Outgoing

- **27 May – Ministry of Disabled People, Public Transport**
- **30 May – Min Mark Mitchell, Response to Request for Info**
- **6 June – Edward Ellison, Eco Fund Panel Role Thanks**
- **13 June – Various Ministers, Rabbit Management on Crown Land**

RECOMMENDATION

That the Council:

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

ATTACHMENTS

1. 2025-05-20 Letter from Min Chris Bishop re Bus Egress [**9.2.1** - 1 page]
2. 2025-05-21 Letter from Min Penny Simmonds P S- CO R 1176 [**9.2.2** - 1 page]
3. 2025-05-21 Letter to Otago Regional Council re transport [**9.2.3** - 3 pages]
4. 2025-05-27 Letter to Whaikaha - Ministry of Disabled People [**9.2.4** - 1 page]
5. 2025-05-30 Letter to Hon Mark Mitchell [**9.2.5** - 4 pages]
6. 2025-06-06 Letter to Edward Ellison - ECO Fund [**9.2.6** - 1 page]
7. 2025-06-13 Letter Crown Land Biosecurity [**9.2.7** - 1 page]

Hon Chris Bishop

Minister of Housing
Minister for Infrastructure
Minister Responsible for RMA Reform
Minister of Transport
Leader of the House
Associate Minister of Finance
Associate Minister for Sport and Recreation



TCB25-1089

Gretchen Robertson
Chairperson, Otago Regional Council
c/o: Kim.Waincott@orc.govt.nz

Dear Gretchen,

Thank you for your email of 30 April 2025 with the suggested change to Land Transport rules to prioritise bus egress from bus stops.

I am pleased to hear Otago's public transport services are attracting record numbers of users. It is also interesting to hear evidence-based ideas for improving the efficiency and effectiveness of our public transport system.

I appreciate the benefits that could arise from allowing buses leaving bus stops to have priority over general traffic, especially during peak travel, but these need to be weighed up against general road safety concerns. While I acknowledge that you have highlighted the disbenefits as being marginal or negligible, previous investigations into whether rules of this type should be introduced in New Zealand highlighted possible safety issues, including that contradicting the general give way rules could cause confusion for drivers and vulnerable road users.

In October 2024, the Government's Road Safety Objectives document was released. One of the Government's priorities for road safety is to improve safety on footpaths, shared paths, and bus and cycle lanes. This will include consideration of proposed changes related to a bus egress give way rule. I expect to receive advice from my officials on this matter in the coming months. Any changes will be informed through public consultation.

Thank you again for writing.

Yours sincerely,

A handwritten signature in blue ink, appearing to read 'Chris Bishop'.

Hon Chris Bishop
Minister of Transport

Hon Penny Simmonds

Minister for the Environment
Minister for Vocational Education
Associate Minister for Social Development and Employment



21 MAY 2025

PS-COR1176/CORM-3892

Gretchen Robertson
Chair
Otago Regional Council
Gretchen.Robertson@orc.govt.nz

Dear Gretchen

Thank you for your email of 8 May 2025 about the issues Otago Regional Council is facing regarding its Regional Plan: Water for Otago.

I appreciate the key points you raised, as well as the technical information your staff recently provided to the Ministry for the Environment. This input is valuable in supporting ongoing discussions.

As you are aware, work in this area is continuing. My officials and I remain committed to working closely with the Council to find a solution that provides greater certainty for the Council, the community, productive landowners, and other stakeholders.

Yours sincerely,

A handwritten signature in blue ink, appearing to read 'P. Simmonds'.

Hon Penny Simmonds
Minister for the Environment

IN-CONFIDENCE



Scan for
NZSL name

Visual description: A purple Whaikaha logo with a QR scan for the NZSL name.

Whaikaha
Ministry of Disabled People

Level 4, 56 The Terrace
Wellington 6011
New Zealand

21 May 2025

To: Richard Saunders; Gretchen Robertson

Email: Richard.saunders@orc.govt.nz; gretchen.robertson@orc.govt.nz

Tēnā koe Richard and Gretchen

I am the chief executive of the Ministry of Disabled People – Whaikaha. The Ministry is the central government ministry responsible for developing strategy and policy to improve the lives of disabled people and tāngata whaikaha Māori.

I am writing to you in your role relating to public transport.

As you will be aware, disabled people often rely on public transport to assist them to get to employment, education, medical appointments, and participating in social activities. It is important that they feel safe, and all modes of transport are inclusive.

We continue to hear from disabled people who have challenges accessing public transport across New Zealand due to a range of factors including attitudes of drivers, accessibility of equipment such as working ramps, and lack of knowledge when it comes to the rights of assistance dogs. Whenever feedback is received, we encourage people to contact the appropriate transport agency. However, I would like to take this opportunity to remind you of your obligations and offer support if it is needed.



Te Kāwanatanga o Aotearoa
New Zealand Government

IN-CONFIDENCE

Whilst we understand that technology and equipment may not always perform as it should, situations are often made worse by the people's attitudes in responding to the situation. I would be grateful if you could re-enforce the message, that disabled people are experts in their own needs. If a disabled person asks for assistance or an accommodation to be made, such as the lowering of a ramp, please believe them and respond in a mana enhancing way.

Access of Assistance Dogs on Public Transport

Despite the legal protection for people with assistance dogs, we are hearing and reading about increasing instances of disabled people having difficulty using public transport. In particular, problems with the behaviour of drivers and other staff who have a role in supporting accessibility, including knowledge about the rights of those with assistance dogs. It appears the main reason for issues arising is a lack of awareness of the law and general understanding.

I encourage you to consider taking further steps to promote and enforce the rights of assistance dog handlers to access public transport in your area.

To support you and your colleagues to understand the correct process, I thought it would be useful to set out the law in this area so you can ensure that all public transport operators in your regions follow this law.

Section 75 of the Dog Control Act 1996 provides rights for Disability assist dogs. Subsection (1) says that:

“(1) Any disability assist dog accompanying and assisting a person with a disability, or accompanying a person genuinely engaged in the dog's training, may enter and remain—

- (a) in any premises registered under regulations made under [section 120](#) of the Health Act 1956; or
- (b) in any public place.”

Section 75(2) also says that “the person whom the dog is accompanying must comply with any reasonable conditions imposed by the occupier or person controlling the premises or place in relation to the entry or presence of the dog”.



Te Kāwanatanga o Aotearoa
New Zealand Government

IN-CONFIDENCE

Finally, section 75(3) makes it clear that “this section overrides any enactment prohibiting or regulating the entry or presence of dogs in relation to the premises and places referred to in subsection (1)”.

In addition to the obligations in the Dog Control Act, section 21 of the Human Rights Act 1993 sets out the prohibited grounds of discrimination, which include “reliance on a disability assist dog, wheelchair, or other remedial means.”

If your current public transport contracting arrangements do not include clear obligations relating to accepting the use of disability assist dogs, I would welcome to opportunity to discuss ways to add to this content.

Thank you for all the work you and your colleagues do in regional councils and unitary authorities across Aotearoa New Zealand, to make our country more inclusive and accessible. I also welcome the opportunity to hear more about any public transport accessibility work you are progressing.

Nāku iti nei, nā



Paula Tesoriero MNZM PLY
Secretary for Disabled People
Te Tumu Whakarae | Chief Executive
Whaikaha - Ministry of Disabled People



Te Kāwanatanga o Aotearoa
New Zealand Government



From the Office of the Chairperson

27 May 2025

Paula Tesoriero
Chief Executive
Whaikaha – Ministry of Disabled People

via Email: Emma.Bennett017@whaikaha.govt.nz

Dear Paula

Thank you for your letter, dated 21 May 2025, in relation to public transport.

ORC is committed to providing reliable, efficient, and accessible public transport for our community and we understand that the varied needs of the disabled community are important to understand when we work towards ensuring accessibility.

In terms of issues with technology and/or drivers frustrating easy use of our public transport system, we want to assure you that we take any matters such as this very seriously. In addition to regular meetings with our operators to talk through any operational issues, we also follow up every complaint received. Where these complaints are about driver behaviour, our operators are committed to addressing these, often through refresher training.

Our operations staff regularly meet with the Otago Disability Engagement Group, as part of wider ORC engagement, with the most recent meeting occurring on 15 May. We also meet with other interest groups such as Grey Power to ensure our public transport community can share issues of concern.

We have also recently extended an invitation to the Disabled Persons' Assembly to join the multi-agency Central City Advisory Group, whose mandate is to work to improve safety and accessibility in the Central City.

With respect to assistance dogs, we are close to finalising our draft Regional Public Transport Plan 2025 -35, which, like our current RPTP, provides for service dogs to be permitted on all our public transport services. We are not aware of specific issues where people have had issues with assistance dogs on our network and are happy to provide reminders to our operators of the legal obligations associated with assistance dogs to ensure this remains the case.

We trust this information is useful for you and are happy to provide more detailed information should that be of benefit.

Yours sincerely,

Gretchen Robertson
Chairperson

Richard Saunders
Chief Executive



From the Office of the Chairperson

30 May 2025

Hon. Mark Mitchell
C/- Darren Brunk
Emergency Management and Recovery Private Secretary
Private Bag 18041
Parliament Buildings
Wellington 6160

via Email: emprivatesecretary@parliament.govt.nz

Dear Minister

Weather response and decision-making processes at Otago Regional Council – Response to letter (Ref: EM COR 2024-25-095) dated 12 May 2025

River Mouth Opening Processes

ORC has good decision-making processes around river mouth openings.

ORC staff routinely monitor river mouths that have a history of closing naturally. These inspections are undertaken at least once a week, and more frequently should water levels start approaching pre-determined trigger levels or if a weather event is forecast. Inspection reports and photos are recorded via a GIS based platform that enables staff access to historical reports, that in turn support river mouth opening decisions. These reports also enable the provision of up-to-date river mouth status information to CDEM and communities during flood events.

Occasionally ORC needs to mechanically open some river mouths outside of when flood conditions exist. As such, staff and contractors are familiar with preparing for and undertaking these actions under a variety of conditions. ORC also endeavours to undertake river mouth opening activities prior to a weather event wherever practicable, with contractors and machinery placed on standby where necessary.

During the October 2024 weather event the inspection, reporting and decision-making regime above was utilised to more rapidly respond to queries from CDEM and members of the public about the status of river mouths, aiding in decision-making and providing reassurance where necessary that river mouths were functioning as efficiently as possible.

Otago's current regulatory environment enables river mouths to be opened by ORC when needed.

The *Regional Plan: Coast for Otago* assists ORC in carrying out its functions to achieve the purpose of the Resource Management Act 1991. This Plan enables ORC to open blocked river mouths or tidal inlets as a permitted activity providing certain conditions are met. ORC aligns its river mouth opening methodologies with these conditions, and at this time is not aware of any additional regulatory levers that would better enable these practices.

There are some limitations when it comes to ORC's ability to maintain open river mouths.

The efficacy of any mouth opening can be limited by the following environmental factors:

- Sea conditions including high tide and storm effects such as wave size, period and direction. Under certain conditions river mouths can be prone to frequent re-blocking as tide and wave action prevent flow and can replace sediment within a few hours.
- Small upstream catchments with relatively low inflows. Under these conditions there may not be enough water being conveyed through the catchment to maintain the flow necessary to help keep the river mouth open, particularly against aforementioned sea conditions.

When the above conditions exist, ORC increases the monitoring frequency, and contractors also remain on standby to re-open the mouth as these conditions subside.

Some areas of improvement have been identified and are actively being addressed.

ORC is planning to install online monitoring at key river mouth sites to enable remote monitoring of water level and environmental conditions. This monitoring will provide staff with real-time data to supplement site inspections and further support staff and flood response teams in decision-making.

ORC Flood Protection Schemes

Flood protection schemes are built and maintained to a good standard.

ORC's flood protection schemes range in age, with construction commencing on the oldest in the late 19th century. The schemes continue to be maintained to a good standard and ORC takes a proactive risk management approach to prioritise and schedule infrastructure renewals and subsequent investment over the long lifetime of this infrastructure. This aids in reducing operational risk with increasing reliability of performance during flood events and increasing confidence in resilience.

Community needs and expectations in relation to flood protection are changing.

The increased intensity and frequency of rainfall events across New Zealand are raising community awareness of the potential impact of major events in Otago. As such, the levels of service provided by ORC's flood protection schemes are under increasing scrutiny. Urban encroachment within scheme catchments is also placing ongoing pressure on existing schemes to perform to meet changing community expectations.

Further to the above, there is an increasing need to balance flood protection alongside amenity, environmental and ecological values. ORC is taking a proactive approach to examine ongoing and future flood protection options that strike a balance across these needs and expectations, through high level scheme planning incorporating likely future trends in key areas such as development and climate change impacts.

River Management

ORC holds resource consents that enable proactive management of river systems. Works include gravel management and erosion control. Emergency works in river systems are also able to be undertake using section 330 of the Resource Management Act.

Weather Event Forecasting

ORC operates a robust flood warning system to provide a flood warning service to the public, communities, businesses, emergency management services and infrastructure managers (including ORC) potentially affected during a heavy rainfall event.

The purpose of the flood warning service is to provide flood warnings and flood risk information, that enables a safe and timely response to heavy rainfall events.

The information provided is used to inform decisions related to the operation of ORC's flood protection schemes, river management and Emergency Management responses.

The system operates 24/7 with a dedicated on-call team. For more details on the flood warning system, refer to the attached report.

To inform the delivery of the service, ORC uses or carries out meteorological, hydrological and coastal monitoring and forecast.

These activities rely on meteorological information (forecasts, severe weather watches or warnings and observations) provided by MetService, and on the hydrological monitoring network (lake and river levels and flows monitoring stations and rainfall stations) operated by ORC and other organisations (such as NIWA and neighbouring regional councils). Coastal hazards forecasting (i.e. early awareness of sea conditions that may cause impacts, such as inundation or erosion, on infrastructure and properties along the coast) is also provided by MetService.

Rainfall information derived from rain radar data is a key information used by ORC to inform and guide decision during responses to potential or actual heavy rainfall events. Since the installation of the coastal Otago weather radar by MetService in December 2020, ORC has been using and investing in ways to operationally use this information. For more details on the Otago rain radar and its use by ORC, refer to the attached report.

The available rain radar data and information are particularly valuable for coastal Otago, but there still exists a gap in coverage in Queenstown-Lakes and Central Otago; areas that are experiencing rapid urbanisation. Filling this gap would assist with managing pluvial flooding, land slide and debris flow risk in Queenstown, Wanaka, Luggate, Cromwell, Clyde, Alexandra, and Roxburgh. In July 2024, the Otago CDEM Group has formally requested the Minister of Transport to improve the radar coverage in the region by requesting support in investigating the feasibility of extending weather radar coverage to encompass Central Otago and Queenstown-Lakes. This will strengthen our ability to safeguard communities and enhance our resilience against weather-related risks. The request was acknowledged by the Minister of Transport (letter and response are attached).

CDEM Alignment

Alignment of ORC Structures via CIMS

Within ORC, the adoption of the Coordinated Incident Management System (CIMS) enables a scalable and flexible structure that can rapidly adapt based on the threshold of an event. CIMS ensures:

- Clear command and control, providing consistent roles and responsibilities across functions such as operations, planning/intelligence, logistics, and public information management.
- Integrated internal coordination, aligning staff from across council departments—such as engineering, hydrology, and communications—under a unified incident structure when an event is elevated beyond standard operational thresholds.
- Rapid escalation protocols, ensuring that once event triggers (e.g. river flow thresholds or forecast conditions) are met, ORC can transition from business-as-usual monitoring to a full emergency response mode coordinated through our Emergency Coordination Centre (ECC).

Connection to District Councils, Stakeholders, and Communities via CDEM Structures

ORC plays a regional leadership role within the Otago Civil Defence Emergency Management (CDEM) Group, providing the overarching coordination across territorial authorities, emergency services, iwi, lifeline utilities, and community groups. Specifically:

- District Council EOCs (e.g., Dunedin, Central Otago, Clutha, Waitaki and Queenstown Lakes) operate under a shared Group Plan, with ORC ECC acting as a regional coordinating node, supporting and integrating local response actions.
- We maintain pre-established liaison roles and communication protocols between ORC and local Emergency Operations Centres to ensure data, situational awareness, and resource coordination flow efficiently.
- Stakeholder integration, including Federated Farmers, lifeline agencies, and emergency services, is embedded through joint training, planning forums, and exercises.
- Community engagement, including work with community response groups and Rūnaka, is ongoing, with flood preparedness education and community-based alerting systems supported regionally.

Challenges and Opportunities

Additional to the points above we are actively working to:

- Strengthen real-time data integration across agencies for forecasting and situational awareness.
- Increase understanding of impacts with detailed and integrated flood studies of at-risk areas.
- Increase regional coverage for rain radar and other real-time weather tracking tools.
- Improve the availability and affordability of meteorological data to inform responses to heavy rainfall events. Currently some of this information, although key in a response, is not readily available to councils or have a notable cost for councils.

Yours sincerely



Cr Gretchen Robertson

Chairperson

Encl



From the Office of the Chairperson

6 June 2025

Mr Edward Ellison
via Email: edward@otakou.co.nz

Tēnā koe Edward

The Council wished for me to express their collective gratitude for the invaluable support you have provided to the ECO Fund process since 2022.

Your unwavering commitment to ensuring an equitable process has been invaluable. The wisdom you have shared has guided us, and your dedication to reviewing applications has significantly impacted the community. Thanks to your efforts, a substantial number of community groups have been able to enhance the environment, creating lasting positive changes.

Your support has made a considerable difference, and we will always remember your contributions with deep appreciation. The ECO Fund's success is a testament to your hard work and dedication, and we are truly grateful for everything you have done.

Thank you once again for your time, effort, and unwavering support.

Ngā mihi nui,

A handwritten signature in blue ink, appearing to read "Gretchen Robertson".

Gretchen Robertson
Chairperson



From the Office of the Chairperson

13 June 2025

Rt Hon Winston Peters, Hon Chris Penk, Hon Chris Bishop and Hon Tama Potaka
Parliament Buildings
WELLINGTON

via Email: Winston.Peters@parliament.govt.nz, Chris.Penk@parliament.govt.nz,
chris.bishop@parliament.govt.nz, Tama.Potaka@parliament.govt.nz

Dear Ministers,

Rabbit Management on Crown Land in Otago

On behalf of the Otago Regional Council (ORC), I am writing to raise concerns about the limited management of feral rabbits on Crown public land across Otago. This issue has been consistently raised by our communities, particularly those in rabbit-prone areas, and Council has resolved to bring it to your attention.

Public and Crown land including land managed by the Department of Conservation, LINZ, KiwiRail and Waka Kotahi -comprises approximately 22% of the Otago region. Under Section 69 (5) of the Biosecurity Act 1993, the Crown is subject to Good Neighbour Rules (GNR) as outlined in the Otago Regional Pest Management Plan 2019-2029 (RPMP).

Despite this, limited rabbit control on some Crown land continues to undermine the efforts of adjacent landowners. These occupiers are investing significant time and resources into rabbit control, only to see reinvasion from neighbouring Crown land where no sustained management is occurring. This makes it difficult for Otago as a region to make progress on rabbit population suppression and maintain compliance with our RPMP.

A 2021 Ministry for Primary Industries report highlights that the economic cost of rabbit impacts in New Zealand increased from \$61 million in 2009 to \$195 million per annum in 2021. This underscores the significance of the issue and the need for coordinated, region-wide approaches — including consistent and proactive management on Crown land.

While other pest species (both plant and animal) also pose challenges due to limited management on public land, this letter is intended to highlight the specific concern Council has resolved to raise regarding feral rabbits. We would welcome the opportunity to discuss this matter further and can provide detailed local context as needed.

We appreciate your consideration and look forward to working with your office and other Crown agencies to strengthen collaborative approaches to biosecurity management across Otago.

Yours sincerely

Cr Gretchen Robertson
Chairperson

cc: Hon Andrew Hoggard, Hon Mark Patterson
Richard Saunders, CEO, Otago Regional Council

10.1. Regional Public Transport Plan Adoption

Prepared for: Council

Report No. GOV2555

Activity: Governance Report

Author: Grace Longson (Transport Planner), Daniel Basubas (Transport Planner), Robyn Hyde (Transport Planning Lead), Jack Cowie (Transport Planner)

Endorsed by: Anita Dawe, General Manager Regional Planning and Transport

Date: 25 June 2025

PURPOSE

- [1] To approve the Regional Public Transport Plan Hearing Panel's recommendations and adopt the Otago Regional Public Transport Plan 2025-2035 (RPTP).

EXECUTIVE SUMMARY

- [2] Otago Regional Council (ORC) has reviewed the Regional Public Transport Plan 2021-2031.
- [3] On 19 March 2025, Council approved the draft RPTP 2025-2035 for public consultation. Councillors Noone, Weir and Wilson were appointed to a Panel to hear and deliberate public submissions on the draft RPTP.
- [4] Public consultation on the draft RPTP commenced on 24 March 2025 and submissions closed on 2 May 2025. Council received 549 submissions.
- [5] The Hearings Panel heard submitters in Dunedin on 13 and 14 May 2025 and in Queenstown on 16 May. The Panel deliberated on the submissions on 19 May 2025.
- [6] The summary of submissions is included as Attachment 1, the staff Hearing Panel and Deliberations report is included as Attachment 2, and a tracked changes version of the Plan reflecting the Panel's recommended changes is included in Attachment 3.
- [7] Fares, concessions, regional connectivity, community transport, rail and vehicle size were common themes in the submissions received. These themes reflect key transport issues and areas of interest in Otago.
- [8] To best give effect to the RPTP, Council will need to give consideration to adequate funding to complete the actions outlined in the Plan.

RECOMMENDATION

That the Council:

- 1) **Notes** this report.
 - 2) **Approves** the Hearing Panel recommendation to increase the adult base fare to \$2.50 before Quarter 2 of the 2025/2026 financial year and outside of term time.
-

- 3) **Approves** the Hearing Panel recommendation to move to a zonal fare structure in the future.
- 4) **Notes** that the exact details of fare zones (e.g. relative fare levels) will be subject to further modelling and analysis outside the scope of this plan, and the modelling and any associated recommendations will be brought back to Council at a later date.
- 5) **Notes** the panel's expectation that prices for multiple fare zones will be based on small/moderate increments of the base fare, and that there will be a small number of zones.
- 6) **Notes** implementation of fare structure changes, including zones, fare capping and use of cash are to occur in line with the transition to Motu Move.
- 7) **Approves** the Hearing Panel recommendation to discontinue free fares for children (5-12 years).
- 8) **Approves** the Hearing Panel recommendation that the child and youth discounts (5-18 years) be set to 40% of the adult base fare (i.e. \$1.50 fare). These changes will take effect from 29 September in line with the base fare increase.
- 9) **Approves** the Hearing Panel recommendation to discontinue free travel for SuperGold holders on the 3:35PM City—Palmerston service and the 3:40PM City—Warrington service or any other service outside off-peak. SuperGold concessions will continue to be available during off-peak. This change will take effect from 29 September in line with the base fare increase.
- 10) **Approves** the Hearing Panel recommendation to amend private share targets to 20% for 2024/25, 23% for 2025/26 and 25% for 2026/27.
- 11) **Notes** the private share recommendation is based on proposed fare increases to adult fares, increasing to \$2.50, and child and youth fares to \$1.50, and a future zonal fare structure.
- 12) **Notes** staff will continue to actively engage with NZTA on setting and reviewing private share targets.
- 13) **Approves** the Panel's recommended changes to the draft RPTP document as per section 9 of the Hearings and deliberations report (Attachment 2) and marked up in the final RPTP document (Attachment 3)
- 14) **Adopts** the amended Regional Public Transport Plan 2025-2035 as final (Attachment 3).
- 15) **Delegates** to the Chief Executive, the power to approve minor editorial changes to the draft Regional Public Transport Plan 2025-2035 subsequent to this meeting.

BACKGROUND

- [9] On 19 March 2025, Council approved the draft RPTP 2025-2035 for public consultation. Councillors Noone, Weir and Wilson were appointed to a panel to hear and deliberate public submissions on the draft RPTP, and make recommendations to Council.
- [10] Public consultation on the draft RPTP commenced on 24 March 2025 and submissions closed on 2 May 2025.
- [11] The core objective of community consultation and engagement was to ignite a conversation about public transport and encourage a wide range of Otago residents to

share their views. Care was taken to try and reach a diverse cross section of our population, including transport disadvantaged groups, such as disability groups, and communities who currently lack public transport.

- [12] A total of 549 submissions were received by Council, of which three full submissions and one amendment to a submission were received late. The total number of submissions received was a 183% increase from the current Otago RPTP 2021-2031, which received 193 submissions.
- [13] The high number and diversity of submitters highlight strong public interest in the draft RPTP and the effectiveness of engagement throughout the development and consultation processes.
- [14] The general sentiment of submissions was that the plan was well written, and the chosen focus areas and objectives were appropriate high-level goals for this plan. Most submitters were pragmatic and acknowledged the public transport challenges our region faces, including the current constrained funding environment.

HEARINGS

- [15] The Hearings Panel heard submitters in Dunedin on 13 and 14 May 2025 and in Queenstown on 16 May 2025. A list of submitters that chose to be heard are listed in Attachment 4.

DELIBERATIONS – RESPONSE TO SUBMISSIONS

- [16] The Panel deliberated on the submissions received on 19 May 2025. The summary of submissions with staff and panel responses is included as Attachment 1, and the staff hearings and deliberations report are included as Attachment 2. Additionally, the tracked changes version of the Plan reflecting the panel's recommended changes is included in Attachment 3.
- [17] The key submission topics are discussed below.

Base fare

- [18] The decision of a base fare increase is formally beyond the scope of the RPTP. However, Council requested it be included in the 2025 draft RPTP's submission form due to its relationship with private share and the other RPTP policies being reset following the Government Policy Statement (GPS).
- [19] The consultation sought to gauge public support for a proposed base fare increase from \$2 to \$2.50 (a 25% increase). This fare change would impact the adult Bee Card fare, as well as concession fares which are calculated as percent discounts off the base fare.
- [20] Submitters supporting an increase in the adult Bee Card base fares generally cited the increase seemed necessary to maintain and improve services and was considered reasonable and affordable. Some submitters offered conditional support if the adult Bee Card base fare increases were paired with service improvements, maintaining free child fares and the implementation of fare capping, indicating submitters understood the complexities and trade-offs of these issues in the current operating environment.

- [21] Submitters opposing a base fare increase cited the potential for higher fares to negatively impact patronage, as people may be more inclined to drive private vehicles, leading to worse environmental outcomes and less revenue.
- [22] After considering the submissions and staff recommendation on the base fare, the panel recommends an increase in the adult base fare to \$2.50 before Quarter 2 of the 2025/2026 financial year. Staff propose to implement the fare change from 29 September 2025 which is during the school holidays.

Child and youth concessions

- [23] When setting concessions, Public Transport Authorities must align with the direction of the GPS and New Zealand Transport Agency's (NZTA) fares and funding policy direction to be eligible for co-funding.
- [24] The consultation sought feedback from the community on retaining free fares for 5–12-year-olds and standardising the child and youth discount across both the Queenstown and Dunedin networks.
- [25] There was strong public support to retain free fares for children and standardise concession discounts for youth in both Dunedin and Queenstown.
- [26] There was strong opposition to a 100% discount for children 5-12 years from NZTA, citing misalignment with the GPS's requirement to increase private share, foregone revenue and inequity with other Councils.
- [27] Staff highlighted that the potential risks of retaining free fares for 5-12 year olds are significant. The risks include loss of fare revenue, potential loss of NZTA co-funding, impact on private share, and threat to future funding of existing services and service improvements.
- [28] After considering the submissions and staff recommendation on the child and youth concessions, the panel recommends the removal of free child fares, and the child and youth discounts (5-18 years) be set to 40% of the adult base fare (i.e. \$1.50 fare). These changes will take effect from 29 September in line with the base fare increase.

Zone fare structure

- [29] The RPTP must specify ORC's method for setting and reviewing fares – the fare structure. Whilst currently operating under a flat fare structure, the consultation proposed moving to a zone fare structure in Dunedin and Queenstown to allow ORC to charge a higher fare for longer-distance trips.
- [30] Submissions centred on fairness of cost distribution, accessibility and reducing environmental impact of longer trips. A zone fare structure that is simple, affordable and easy to understand was also important.
- [31] After considering the submissions and staff recommendation on the fare structure, the hearing panel recommends:
 - a. No changes are made to the current fare structure policy in the draft RPTP; and
 - b. Moving to a zonal fare structure in the future; and

- c. The exact details of fare zones (e.g. relative fare levels) will be subject to further modelling and analysis outside the scope of this plan, and brought back to Council at a later time; and
- d. Implementation of fare structure changes, including zones, fare capping and use of cash are to occur in line with the transition to Motu Move.

[32] The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.

Community Transport

[33] There were a number of submissions supporting the community transport concept, and its role to provide transport options in smaller communities where a fixed route service(s) are not feasible.

[34] The panel heard from a number of organisations already providing community transport support and the challenges and limitations they faced.

[35] ORC support for community transport will require additional funding and/or resourcing. It is unlikely that NZTA will provide financial support for community transport at this stage, as it does not align with the current GPS's strategic priorities.

[36] The timing and scale of a future community transport programme will need to be determined following direction from Council and taking into account funding processes including the NLTF and LTP.

[37] The panel supports the staff recommendation that there are no changes needed to the community transport section of the RPTP. As it is currently written, the section establishes strategic goals and provides guidance on community transport while allowing Council the flexibility to determine specific implementation details.

Network design and level of service

[38] There were a number of submissions seeking new services, increased frequency or longer service hours for existing services.

[39] Submitters requested new public transport services to connect:

- a. Wānaka and Upper Clutha, including a Wānaka to Queenstown bus service,
- b. Ōamaru to the Dunedin network, as well as a fixed-route or on-demand service for Ōamaru,
- c. Dunedin airport,
- d. Balclutha,
- e. Outram, and
- f. Central Otago

[40] Submitters expressed concern that the need for these services was now, not in the more vague time frame of 'the next 10 years' as indicated on the network maps in the plan.

[41] The panel agreed that more granularity of the future network aspirations maps was required and to accelerate introducing public transport services for Wānaka.

Rail and other modes

- [42] A number of submitters requested the inclusion of rail as a future mode for commuter and inter regional passenger services in the plan. There was also concern at the lack of inclusion of other alternative modes such as cable/rope technologies.
- [43] The panel acknowledges the interest in rail and other possible future modes and recommends the inclusion of 'investigating the role of rail in delivering regional services' as well as minor amendments to text in the plan as outlined in the recommended changes to the draft document set out in section 9 of the Hearings and deliberations report (Attachment 2).

Private share

- [44] A private share of operating costs paper was presented to Council at the 19 February 2025 meeting. Council resolved to:
- a. Approve advising NZTA Waka Kotahi that fare changes, including changes to adult fares or the introduction of fare zones will be consulted on as part of the RPTP, and formal reporting of private share targets and projections will be provided to NZTA by 30 June 2025, after the RPTP process has concluded (Resolution CM25-114).
 - b. Note the requirement to increase private share funding of public transport services and the initial private share targets advised by staff to NZTA officials, which are to be confirmed through the RPTP process (Resolution CM25-115).
- [45] NZTA initially proposed targets for Otago were 24% for 2024/25, 30% for 2025/26 and 42% for 2026/27.
- [46] Agreed staff level proposed targets for inclusion in the RPTP were 20% for 2024/25, 25% for 2025/26 and 30% for 2026/27.
- [47] Few submitters engaged directly on this topic, so submissions alone provide little reason to amend the targets.
- [48] However, through further work completed by staff it has become apparent that the ability to grow private share in a linear fashion will be challenging. Combined with that, fare mechanisms are our only certain means to influence private share in the short term.
- [49] Based on modelling to reflect the increase in revenue from proposed fare increases of adult fares moving to \$2.50 and child fares to \$1.50, staff estimate private share of 19.7% for 2024/25, 22% for 2025/26 and 23.8% for 2026/27.
- [50] Staff therefore recommended amending the private share targets to 20%, 23% and 25% respectively.
- [51] Achieving these targets relies on decisions on the use of a future zonal fare structure and realising advertising and commercial revenue opportunities.
- [52] The panel supports the staff recommendation and recommends amending private share targets to 20% for 2024/25, 23% for 2025/26 and 25% for 2026/27.
- [53] It is also noted that staff will continue to actively engage with NZTA on setting and reviewing private share targets.

SuperGold

- [54] At the 5 March 2025 the Public and Active Transport Committee (PATC), Council recommended that the SuperGold Bee Card concession continue to apply on the 3:35PM City—Palmerston service and the 3:40PM City—Warrington service, with a final decision to be made as part of decisions on the new Otago RPTP (Resolution PAT25-105).
- [55] NZTA Development guidelines for regional public transport plans 2024 states that “PTAs must ensure any regionally defined concessions (including SuperGold) do not duplicate or conflict with a nationally-defined fare concession.”
- [56] To extend the hours in which we offer SuperGold concessions would contravene this policy, not attract co-funding and put our relationship and funding support from NZTA at risk. It is also not good practice to have one-off policies for certain services, and therefore if the hours were to be extended for SuperGold concession on these services, we would need to make this consistent across all services leaving the city at a similar time.
- [57] The Panel therefore recommended that SuperGold concessions only apply during off peak hours.

CONSIDERATIONS**Strategic Framework and Policy Considerations**

- [58] The RPTP is the guiding strategic document for the planning and delivery of public transport in Otago. It is developed under the Otago Southland Regional Land Transport Plans 2021-2031 (2024 mid-term review) (RLTP).
- [59] The RPTP is consistent with the 'Transport' Strategic Direction set by Council for an integrated transport system that contributes to the accessibility and connectivity of our community, reduces congestion and supports community wellbeing aspirations.

Financial Considerations

- [60] Development of the RPTP is a required activity, and part-funded by the National Land Transport Fund.
- [61] Policies and actions in the RPTP give direction to future investment decisions but do not in their own right commit ORC to funding specific projects and interventions. However, for the aspirations outlined in the RPTP to be achieved, adequate resource and investment will need to be prioritised through the LTP and AP processes.
- [62] The panel made a strong recommendation for the actions and aspirations in the RPTP to be funded and implemented.
- [63] The RPTP responds to the GPS to increase the private share of public transport operating costs to reduce the burden on ratepayers and taxpayers. The plan includes changes in ORC’s approach to funding, fares, fare structure and concessions.

Significance and Engagement

[64] In accordance with Council's He Mahi Rau Rika; Significance, Engagement and Māori Participation policy, the review of the RPTP is deemed to be significant due to its "impact on community include costs [directly or] indirectly to the community or part of the community, whether through rates, fees or otherwise" and due to:

- Potential impacts on the delivery of outcomes of Council's policies and strategies.
- The degree to which the policies set out in the RPTP will contribute to the promoting of achieving particular community outcomes through public transport.
- Any inconsistency of new public transport policy, plans or levels of service with those as specified in the existing RPTP.

[65] The draft RPTP was consulted on in accordance with the Special Consultation Procedure specified in Section 125 of the Land Transport Management Act 2003 and Sections 83 and 87 of the Local Government Act 2002.

Legislative and Risk Considerations

[66] An RPTP is a requirement of the Land Transport Management Act 2003 (LTMA) as set out in Section 119.

[67] Section 124 of the LTMA sets out a number of matters that the Regional Council must be satisfied that the plan has taken account of before adopting. These are:

A regional council must, before adopting a regional public transport plan,—

(a) Be satisfied that the plan—

- i. Contributes to the purpose of this Act; and
- ii. Has been prepared in accordance with any relevant guidelines that the Agency has issued; and
- iii. Is, if it includes a matter that is not within the scope of the regional land transport plan, otherwise consistent with that plan; and

(b) Be satisfied that it has applied the principles specified in section 115(1); and

(c) Take into account—

- i. Any national energy efficiency and conservation strategy; and
- ii. Any relevant regional policy statement, regional plan, district plan, or proposed regional plan or district plan under the Resource Management Act 1991; and
- iii. The transport component of any plan or strategy that has been developed and publicly consulted on by—
 - a. A territorial authority within the region; or
 - b. The regional council if it has transferred its public transport responsibilities to a territorial authority under section 17 of the Local Government Act 2002; and
- iv. The public transport funding likely to be available within the region; and
- v. The need to obtain the best value for money; and
- vi. The views of the territorial authorities in the region; and
- vii. The views of public transport operators in the region; and
- viii. The views of the public transport workforce and its representative unions registered under Part 4 of the Employment Relations Act 2000; and

(d) Consider the needs of persons who are transport-disadvantaged.

- [68] The RPTP contributes to the purpose of the LTMA which is 'to contribute to an effective, efficient, and safe land transport system in the public interest' primarily through the five focus areas and objectives set out in the plan.
- [69] This RPTP has been developed in accordance with the LTMA (Sections 117 – 126) and the NZTA's Development Guidelines for Regional Public Transport Plans (2024) and is consistent with the RLTP.
- [70] Section 9.1 Appendix A of the plan specifies how this RPTP gives effect to each of the principles specified in section 115(1).
- [71] Section 9.3 Appendix C of the plan outlines how this RPTP takes account, considers, aligns and gives effect to the range of local, regional and national strategies, plans and policies to support the requirement of the LTMA.
- [72] The views of the region's territory authorities, public transport operators and workforce have been included in the development of this plan through engagement and shared working sessions.
- [73] The plan's focus area five of the plan is value for money. This clearly outlines the desire to achieve good value for money for our community and co-funders. The availability of funding in the region is well considered throughout the document, but specifically when considering the level of ambition with regards to improving service coverage and frequency.
- [74] The needs of the transport-disadvantaged are addressed through the equity focused approach to delivering public transport as set out in focus area two (section 3) and section 2.8 Improving accessibility for transport-disadvantaged people.
- [75] The RPTP must be notified within 20 working days of the date on which the regional council adopts the plan.

Communications Considerations

- [76] If Council agrees to adopt the RPTP, the community will need to be updated on the outcome of the key fare decisions and the revised plan made available.
- [77] Section 121 of the LTMA sets out Council's obligations for notification and provision of copies of the plan to relevant parties.

NEXT STEPS

- [78] If Council approves the RPTP the next steps would be to:
 - a. Advise the public that the plan has been adopted following Council's communication strategy
 - b. Upload the completed summary of submission responses to Council's website to advise each submitter how the Council has responded to their submission points
 - c. Prepare and publish a final version of the Plan incorporating the recommended changes.

ATTACHMENTS

1. RPTP Summary of Submissions Post-Deliberations [**10.1.1** - 193 pages]

2. RTPP Final Hearings and Deliberations Report [**10.1.2** - 52 pages]
3. Draft RTPP for 25 June Council [**10.1.3** - 125 pages]
4. List of Submitters Heard [**10.1.4** - 1 page]

Draft Regional Public Transport Plan 2025-2035
Summary of Submissions and Hearings Panel Recommendations

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Peter Jenkins		RPTP-0001	Bus stop infrastructure	Additional bus stop requested at Peninsula/Poplar intersection in Kelvin Heights	No changes to RPTP - operational	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
Peter Jenkins		RPTP-0001	Vehicles smaller	Kevin Heights services should have smaller buses running more frequently	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Peter Jenkins		RPTP-0001	Vehicles smaller	Use smaller buses at increased frequencies when expanding services into smaller towns	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Kristina Goldsmith		RPTP-0002	Fares concessions	Supports free child fares on the condition that adult fares don't increase	No changes to RPTP	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Kristina Goldsmith		RPTP-0002	Fares base fare	Opposes base fare increase on the basis that cost of living is high enough and would potentially trigger more fare increases	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
tania rohtmets		RPTP-0003	Frequency	Reduce Balaclava and St Clair routes to half-hourly	No changes to RPTP	We put high value on frequent routes serving our communities. We will, however, continue to evaluate opportunities to optimise our service costs.	We put high value on frequent routes serving our communities. We will, however, continue to evaluate opportunities to optimise our service costs.	
tania rohtmets		RPTP-0003	Fares concessions	Retain low fares for beneficiaries	No changes to RPTP - base fare decision		No change to Draft Plan. The Community Connect concession will be retained.	
tania rohtmets		RPTP-0003	Fares zones	Users taking longer trips such as to Mosgiel and Palmerston should pay more	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Gramt Craig		RPTP-0004	Operations	Request for newer buses for Route 77 (Unit 5)	No changes to RPTP	New buses for Unit 5 will be coming into service in the months to come	New buses for Unit 5 will be coming into service in the months to come	
Gramt Craig		RPTP-0004	Routes	Mosgiel express (Route 77) has greatly improved public transport services for commuters from Mosgiel	No changes to RPTP	Noted with thanks	Noted with thanks	
Gramt Craig		RPTP-0004	Dunedin bus hub	Supports the Dunedin Bus Hub as a great public transport infrastructure asset	No changes to RPTP	Noted with thanks	Noted with thanks	
Gramt Craig		RPTP-0004	Dunedin bus hub	Concern for safety issues at Dunedin Bus Hub, especially for children	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	
Gramt Craig		RPTP-0004	Rail and ferries	Request to consider and plan for rail services as an eventual public transport need, such as purchasing land at the Mosgiel Rail Station Yard and discussing options with rail companies.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Gramt Craig		RPTP-0004	Fares base fare	Opposes any fare increases	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Gramt Craig		RPTP-0004	Fares base fare	Request to keep low fares and continue improving timetables as ways to increase patronage	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago. The plan includes policies and actions to support development of timetables.	
Nikita Woodhead		RPTP-0006	Wayfinding	Improve real-time tracking	No changes to RPTP - noting	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	
Nikita Woodhead		RPTP-0006	Fares base fare	Don't change \$2 fare -- it's made using the bus more affordable and the number of users is noticeably higher. Old fares could be over \$5 each way and this added up fast	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Isobel Taylor		RPTP-0008	School services	Wants school buses in rural towns (e.g. Milton and Waiholā)	No changes to RPTP - noting	A Balclutha to Dunedin service is an integral service in our plan, but is not currently funded. As such we are not able to make a commitment to such services, but our plan aligns with this goal.	A Balclutha to Dunedin service is an integral service in our plan, but is not currently funded. As such we are not able to make a commitment to such services, but our plan aligns with this goal.	
Nathan Woodfield		RPTP-0010	Fares concessions	Supports 100% discount for 5-12 years, especially for peak time traffic congestion and in light of Ministry of Education service removal.	No changes to RPTP	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Nathan Woodfield		RPTP-0010	Fares concessions	Supports 40% discount for 13-18 years, but thinks it is less important than keeping the 100% discount for 5-12 years.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Nathan Woodfield		RPTP-0010	Community transport	Supports ORC introducing a community transport programmeme. Sees the use in community transport services themselves, as well as the data they will generate for understanding communities' transport needs.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Nathan Woodfield		RPTP-0010	Pets on buses	Request to maintain current pet policy. Opposes changing the policy to attract more pets on buses.	No changes to RPTP	Existing pet policy maintained	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Nathan Woodfield		RPTP-0010	Wayfinding	Appreciates that better access to bus times has improved passenger experience	No changes to RPTP	Noted with thanks	Noted with thanks	
Nathan Woodfield		RPTP-0010	Vehicles electric	Supports electric buses for reducing pollution and a more comfortable passenger experience	No changes to RPTP	Noted with thanks	Noted with thanks	
Nathan Woodfield		RPTP-0010	Focus areas	Supports focus areas, especially passenger experience	No changes to RPTP	Noted with thanks	Noted with thanks	
Nathan Woodfield		RPTP-0010	Fares base fare	Supports increasing base fare to \$2.50. Appreciates that increased fares can fund better urban and new regional services	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Nathan Woodfield		RPTP-0010	Fares zones	Supports the proposed zone design in comparison with Dunedin's previous zones.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Nathan Woodfield		RPTP-0010	Fares zones	Request to assess whether patronage is high enough in outer areas to increase their fares with zones	No changes to RPTP - zone fare decision		Our network is seeing significant pressure on peak services for longer trips. No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Shaquille Newton		RPTP-0011	Routes	Wants there to be more routes	No changes to RPTP - noting	Our plan includes new regional routes that do not currently operate. However, these are not currently funded. We note that in urban areas, more routes does not always mean more service -- it could just mean lower frequencies. See section 5.1 of the full plan	Our plan includes new regional routes that do not currently operate. However, these are not currently funded. We note that in urban areas, more routes does not always mean more service -- it could just mean lower frequencies. See section 5.1 of the full plan	
Shaquille Newton		RPTP-0011	Ticketing system	Wants Bee cards for under 5 year olds, so they understand how to use service.	No changes to RPTP - noting	We support teaching children to navigate the network, including paying fares. We do not view Bee Cards for under-5s as necessary, however.	We support teaching children to navigate the network, including paying fares. We do not view Bee Cards for under-5s as necessary, however.	
Shaquille Newton		RPTP-0011	Fares base fare	Opposes fare increases	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Shaquille Newton		RPTP-0011	Fares zones	Opposes zone fare structure due to fairness	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
S Watson		RPTP-0012	Fares concessions	There should be one fare for children and youths up to 18	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
S Watson		RPTP-0012	Fares base fare	Don't increase fares, or increase them as little as possible such as 20c, because the increased cost can add up quickly for regular users	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
S Watson		RPTP-0012	Fares zones	Disagree with zonal fares -- it's going backwards to what we used to have	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sarah Brimon		RPTP-0013	Fares concessions	Supports keeping 100% discount for 5-12 years	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sarah Brimon		RPTP-0013	Collaboration with institutions	Request for more access roads in and out of Queenstown	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	
Sarah Brimon		RPTP-0013	Collaboration with institutions	Address heavy traffic in Queenstown, for instance through accelerating road works	No changes to RPTP - noting	Public transport has a part to play in addressing traffic congestion, and we work with QLDC and NZTA to minimise disruption from roadworks	Public transport has a part to play in addressing traffic congestion, and we work with QLDC and NZTA to minimise disruption from roadworks	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Sarah Brimon		RPTP-0013	Fares base fare	Opposes increasing base fare. Wants governments to find sources of funding beyond taxpayers	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sarah Brimon		RPTP-0013	Fares zones	Supports zone fares as long as trips within urban areas fares remain low	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jazmine Bell		RPTP-0014	Fares concessions	Maintains importance of Community Connect concessions, particularly for vulnerable people	No changes to RPTP - noting	Concession value decision	This concession will be maintained.	
Jazmine Bell		RPTP-0014	Fares base fare	Opposes adult Bee card fare increases	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Helen Gibbs		RPTP-0016	Fares zones	Fares should not be free for children and youth travelling multiple zones whose families are above the Community Service Card threshold.	No changes to RPTP - noting	Child and youth concession value decision	Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones. There will be a uniform 40% concession for 5-18 year olds.	
Helen Gibbs		RPTP-0016	Wayfinding	Request to improve buses' real-time information by not letting drivers turn tracking off, keeping the tracking on if the bus is more than 15 minutes late, and ensuring tracking remains on during route detours.	No changes to RPTP - noting	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	
Helen Gibbs		RPTP-0016	Wayfinding	Request to add all cancelled bus alerts to Transit app.	No changes to RPTP - noting	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	
Helen Gibbs		RPTP-0016	Fares base fare	Change fare structure so all non concession groups pay \$4. This would encourage people to register for Community Service Cards.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Helen Gibbs		RPTP-0016	Fares zones	Supports zone fares. Proposes higher zone fares are no more than \$2 for each fare group.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Woodrow Sonya		RPTP-0017	Fares concessions	Opposes free fares for children, thinks it should be the same price as 13-18 year olds	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Woodrow Sonya		RPTP-0017	Fares base fare	Opposes fare increases, wants to keep fares low	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Keri Jackson		RPTP-0018	Fares base fare	Increase in fares would be acceptable if there was more frequent services, but otherwise anything more than \$2 is too high	No changes to RPTP - base fare decision	Charging different fares for different levels of service removes the value of the simplicity of a low flat fare.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Keri Jackson		RPTP-0018	Reliability	Would like to see service be more regular and reliable	No changes to RPTP - noting	Focus Area 4 of our plan (A connected and integrated network) emphasises the importance of reliability and frequency.	Focus Area 4 of our plan (A connected and integrated network) emphasises the importance of reliability and frequency.	
Trina Excell		RPTP-0019	Fares concessions	Opposes youth (13-18 years) being charged a fare. Believes all passengers 18 and under should travel for free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Trina Excell		RPTP-0019	Fares base fare	Supports base fare increase to \$2.50.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mike Wheeler		RPTP-0020	Fares concessions	Supports free fares for all school students (up to year 13) and maintaining low fares for Community Services Card holders	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Mike Wheeler		RPTP-0020	School services	Wants dedicated buses that go directly to schools	No changes to RPTP	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Mike Wheeler		RPTP-0020	Fares base fare	Supports increasing adult Bee card fares	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mike Wheeler		RPTP-0020	Fares zones	Opposes moving to zones	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Angela Dempster-Passang		RPTP-0021	Bikes on buses	Request that bike racks be restored to service urgently	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Angela Dempster-Passang		RPTP-0021	Fares base fare	Free buses could improve usage.	No changes to RPTP - noting	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	
Angela Dempster-Passang		RPTP-0021	Reliability	Early and late running make using the bus a challenge	No changes to RPTP - noting	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	
Amanda Purvis		RPTP-0022	Dunedin Airport service	Introduce airport service, charge \$20 airport fare but enable people en route to use the service at a local fare.	No changes to RPTP - noting	Airport zone identified in zone system to provide ability to charge higher fare for this trip purpose. A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded.	Airport zone identified in zone system to provide ability to charge higher fare for this trip purpose. A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded.	
Amanda Purvis		RPTP-0022	Community transport	Supports ORC supporting and building community transport in Otago, especially for ageing populations.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Amanda Purvis		RPTP-0022	Fares local/tourists	Charge cruise ship passengers \$10 fare.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Amanda Purvis		RPTP-0022	Fares concessions	Would like youth fare concession to be a 50% discount, not 40%.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Amanda Purvis		RPTP-0022	Fares zones	Opposes a zone fare structure due to cross-zone fares becoming unaffordable for many families and causing patronage to decrease.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Amanda Purvis		RPTP-0022	Fares base fare	Request to keep fares affordable so people continue to make the mode shift from car to public transport. It is better for the environment.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Astrid Erasmuson		RPTP-0023	Community transport	Supports community transport, though wants costs to be reasonable	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Astrid Erasmuson		RPTP-0023	Vehicles electric	Supports electric buses in Dunedin	No changes to RPTP	Noted with thanks	Noted with thanks	
Astrid Erasmuson		RPTP-0023	Frequency	Supports increasing frequency of well-travelled routes, including Port Chalmers during cruise ship season	No changes to RPTP - noting	Our plan supports more frequent services to deliver a bus network that is available when people need it.	Our plan supports more frequent services to deliver a bus network that is available when people need it.	
Astrid Erasmuson		RPTP-0023	Fares base fare	Supports raising adult Bee card fares to \$2.50	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Astrid Erasmuson		RPTP-0023	Fares zones	Opposes zone fare structure due to potential high fare cost.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Anna S		RPTP-0024	Fares concessions	Reduce 13-18 concession from 40% to 20%, offer to tertiary students as well	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Anna S		RPTP-0024	Fares base fare	Don't increase the base adult fare - dislikes how expensive buses are in Wellington	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Anna S		RPTP-0024	Fares zones	Higher fares within reason to outlying areas are reasonable; people choose where to live because of cheap housing	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jodie Walker		RPTP-0025	Rail and ferries	Request for passenger train services connecting smaller towns and rural areas to reduce the number of buses on regional roads.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to improve connectivity and access for smaller towns.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Jodie Walker		RPTP-0025	Fares base fare	Opposes base fare increase so services do not become unaffordable for low income groups	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jodie Walker		RPTP-0025	Fares zones	Opposes zone fare structure because they believe services should be just as accessible for everyone, regardless of where they live.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Amanda Brown		RPTP-0026	Fares concessions	Supports maintaining fare concessions for children and thinks school children should travel for free	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Amanda Brown		RPTP-0026	Community transport	Supports community transport as a transport solution, may need to partner with commercial transport companies	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Amanda Brown		RPTP-0026	School services	Supports dedicated school bus routes	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Amanda Brown		RPTP-0026	Fares base fare	Supports increasing adult Bee card fare, but wants fare to remain affordable	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Pia Davie		RPTP-0027	Routes	Put a bus route and stops nearer John McGlashan College (Dunedin) -- the bus is too far for many older people in this area	No changes to RPTP - noting	While we aim to deliver as much coverage as realistic, there will be some areas that are challenging to serve due to road layout and land use patterns. In these areas, people may need to walk a little further to catch the bus.	While we aim to deliver as much coverage as realistic, there will be some areas that are challenging to serve due to road layout and land use patterns. In these areas, people may need to walk a little further to catch the bus.	
Juanita Willems		RPTP-0028	Fares base fare	Opposes a base fare increase because it could make the service unaffordable and create more transport disadvantage for people.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Juanita Willems		RPTP-0028	Fares base fare	Request to keep services affordable so it remains accessible for groups like the disabled community.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Gillian Noon		RPTP-0029	Fares concessions	Supports free fares for children as they don't have an income and the bus has social benefits for them	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Gillian Noon		RPTP-0029	Frequency	Supports increasing frequency (20 min) to the No. 18 Peninsula route	No changes to RPTP - noting	We are aware that the Peninsula service sees a high peak loading and will consider this in future development of its timetable	We are aware that the Peninsula service sees a high peak loading and will consider this in future development of its timetable	
Gillian Noon		RPTP-0029	Fares base fare	Supports adult Bee card fare increase as it is still affordable compared with parking/driving	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Gillian Noon		RPTP-0029	Fares zones	May not take the bus for longer trips if the cost is too high compared with driving	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Beverley Holmes		RPTP-0030	Routes	Would like there to be a route between St Clair, Tomahawk, and Andersons Bay	No changes to RPTP - noting	It is important to avoid dividing our resources between too many routes, as this reduces our ability to fund high-frequency services. Where direct trips cannot be supported, passengers may transfer between services, while paying only one fare.	It is important to avoid dividing our resources between too many routes, as this reduces our ability to fund high-frequency services. Where direct trips cannot be supported, passengers may transfer between services, while paying only one fare.	
Ari Tristianto Wibowo		RPTP-0031	Timetables	Extend service hours so first bus starts at 6am latest. This would enable people commuting early in the morning to use public transport.	No changes to RPTP - noting	Our Fares and Frequencies Business Case puts high importance on long service hours, especially for shift workers (such as at the hospital). Our plan reflects this, but we note that major improvements in this area will be limited funding available.	Our Fares and Frequencies Business Case puts high importance on long service hours, especially for shift workers (such as at the hospital). Our plan reflects this, but we note that major improvements in this area will be limited funding available.	

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Ari Tristianto Wibowo		RPTP-0031	Routes	Request to evaluate Route 70 services due to its low patronage.	No changes to RPTP - noting	Section 5.2 of our plan includes an action to periodically review services based on factors such as patronage	Section 5.2 of our plan includes an action to periodically review services based on factors such as patronage	
Ari Tristianto Wibowo		RPTP-0031	Marketing, promotion, engagement	Request for survey into how public transport can reduce car usage.	No changes to RPTP	There is a wide body of research on this matter and we do not need to duplicate it. However, we agree that it is important to regularly understand community views and study our local context.	There is a wide body of research on this matter and we do not need to duplicate it. However, we agree that it is important to regularly understand community views and study our local context.	
Ari Tristianto Wibowo		RPTP-0031	Ticketing system	Requests children's bus cards look different so it is more obvious when adults are paying child fares.	No changes to RPTP - operational	This is a great idea, unfortunately not something that is possible as we move to the National Ticketing Solution model.	This will not initially occur as we transition to the National Ticketing Solution. As many people will be paying with bank cards that do not have uniform appearance, it is difficult to see how this would work in practice.	
Ari Tristianto Wibowo		RPTP-0031	Reliability	Request to address Route 77 to Mosgiel running late in the afternoon.	No changes to RPTP - operational	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	
Ari Tristianto Wibowo		RPTP-0031	Fares zones	Supports a zone fare structure as they believe it is more fair.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Chris Hays		RPTP-0032	Fares concessions	Supports retaining free fares for children and standardising concessions in Dunedin/Queenstown	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Chris Hays		RPTP-0032	Bus drivers	Thinks bus drivers can be rude and miss requested stops	No changes to RPTP - operational	Comment has been passed on to our Operations team.	Comment has been passed on to our Operations team.	
Chris Hays		RPTP-0032	Fares base fare	Opposes adult Bee fare increases	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Chris Hays		RPTP-0032	Fares zones	Opposes zone fares	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Hayden Johnson		RPTP-0033	Fares concessions	Wants a \$1 fare for under-12s -- adults pay and so should children	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Hayden Johnson		RPTP-0033	Bus stop infrastructure	Would like a shelter outside Tahuna Park	No changes to RPTP - follow up action	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. DCC manage Dunedin bus infrastructure. Will pass this request on to DCC	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. DCC manage Dunedin bus infrastructure. Will pass this request on to DCC	
Hayden Johnson		RPTP-0033	Focus areas	The plan has too many broad statements, and reads as a wish list.	No changes to RPTP - noting	We have tried to balance the strategic nature of the plan, and the high expectations our community has for public transport, with the constraints of our funding and operating environment. We understand that the balance may not be perfect.	We have tried to balance the strategic nature of the plan, and the high expectations our community has for public transport, with the constraints of our funding and operating environment. We understand that the balance may not be perfect.	
Hayden Johnson		RPTP-0033	Operations	Would like improved heating on buses when it is cold	No changes to RPTP - operational	We'll pass on the query to our operations team.	We'll pass on the query to our operations team.	

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Hayden Johnson		RPTP-0033	Fares zones	Don't implement zones, the old zone system was ridiculous and standard fares encourage people to explore the city	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Mandy Phipps-Green		RPTP-0034	Fares base fare	Supports an adult fare increase to \$2.50, but opposes any fare increases to youth. Due to youth fares already increasing in 2024, they do not want to see them go up again.	No changes to RPTP - base fare decision	And child and youth concession value decision	The base adult fare will be \$2.50 across Otago. There will be a uniform 40% concession for 5-18 year olds.	
Mandy Phipps-Green		RPTP-0034	Fares concessions	Opposes free child (5-12 years) fares. Would rather children pay a small amount to subsidise lower youth (13-18 years) fares, which already increased in 2024.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Mandy Phipps-Green		RPTP-0034	Public information	Praise for the Orbus website working well.	No changes to RPTP	Noted with thanks	Noted with thanks	
Mandy Phipps-Green		RPTP-0034	Public information	Praise for the Orbus social media presence, which does a good job at sharing information.	No changes to RPTP	Noted with thanks	Noted with thanks	
Mandy Phipps-Green		RPTP-0034	Operations	Praise for the ORC customer service team who do a great job at answering queries.	No changes to RPTP	Noted with thanks	Noted with thanks	
Mandy Phipps-Green		RPTP-0034	General	Praise for Orbus services fitting the respondent and their family's needs well. Frustration that Central Government is making cuts to public transport funding.	No changes to RPTP	Noted with thanks	Noted with thanks	
Yuta Wibowo		RPTP-0035	Fares concessions	Supports retaining free fares for children due to reduced carbon emissions and financial pressure for families	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Yuta Wibowo		RPTP-0035	Community transport	Supports community transport	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Yuta Wibowo		RPTP-0035	Wayfinding	Enjoys real time tracking of buses	No changes to RPTP	Noted with thanks	Noted with thanks	
Yuta Wibowo		RPTP-0035	Vehicles electric	Supports electric buses, particularly ones that have reliable air conditioning and are quieter	No changes to RPTP	Noted with thanks	Noted with thanks	
Yuta Wibowo		RPTP-0035	Ticketing system	Wants standardised way to pay for buses through visa/Mastercard	No changes to RPTP - noting	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment	
Yuta Wibowo		RPTP-0035	Fares zones	Supports zone fares because travelling further means higher cost	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Mason Hoseit		RPTP-0036	Fares concessions	Requests free travel for people under 22 and people with community service cards	No changes to RPTP - noting	Child concession value decision. Additionally noting the RPTP contains an explanation for why offering 'free' buses for a wider group is not supported.	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Mason Hoseit		RPTP-0036	Fares base fare	Don't increase adult fares, it would be too expensive	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Rhonda K		RPTP-0037	Fares concessions	Supports child fares being free, but thinks youth fares should also be free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Rhonda K		RPTP-0037	Frequency	Request to make more routes' peak-time frequencies better than 30 minutes.	No changes to RPTP - noting	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	
Rhonda K		RPTP-0037	Routes	Extend routes into new developments around Dunedin's hill areas	No changes to RPTP	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	
Rhonda K		RPTP-0037	Fares base fare	Opposes a base fare increase because it will have a negative impact on patronage and therefore profit. It will also make services less affordable.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Rhonda K		RPTP-0037	Fares zones	Opposes a zone fare structure. Suggests, if zones are implemented, that fares are still affordable in outer zones to avoid losses in patronage.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Dee Robinson		RPTP-0038	Frequency	Supports increased bus frequencies, particularly in Queenstown	No changes to RPTP	Frequency improvements for the Queenstown network are funded and will commence in July 2025.	Frequency improvements for the Queenstown network are funded and will commence in July 2025.	
Dee Robinson		RPTP-0038	School services	Supports Ministry of Education subsidising buses for students	No changes to RPTP - noting	MOE services are not regulated by ORC or this Plan, but we agree that these form an important part of the public transport system. An MOE subsidy would be another form of public share revenue so not helpful in achieving increased private share directive.	MOE services are not regulated by ORC or this Plan, but we agree that these form an important part of the public transport system. An MOE subsidy would be another form of public share revenue so not helpful in achieving increased private share directive.	
Dee Robinson		RPTP-0038	Fares zones	Opposes zone fare structure because it could further incentivise people living further away to drive	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Amelie A		RPTP-0039	Bikes on buses	Restore bike racks to buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Amelie A		RPTP-0039	Fares concessions	A strong youth concession is important to Dunedin compared to Queenstown as people are generally poorer	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Amelie A		RPTP-0039	Community transport	Likes idea of supporting community vehicle trusts but is concerned about costs to ratepayers	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Amelie A		RPTP-0039	Community transport	Likes idea of supporting community vehicle trusts but thinks it should be public transport not personal transport for environmental reasons	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	

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Amelie A		RPTP-0039	General	Would like the plan to have a stronger evidence base in terms of usage and financial numbers	No changes to RPTP - noting	We have carefully considered the level of detail suitable for this strategic plan. Evidence and greater financial detail is more suited to a business case, AP or LTP.	We have carefully considered the level of detail suitable for this strategic plan. Evidence and greater financial detail is more suited to a business case, AP or LTP.	
Amelie A		RPTP-0039	Fares base fare	Accepts increasing fares to \$2.50 is okay, but not ideal and will have a negative effect on revenue and congestion	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Amelie A		RPTP-0039	Fares zones	Is unable to support zonal fares as they don't know how much they would be, but would accept them if the increases with distance were not too steep and longer trips were still affordable	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Rachel Stanton		RPTP-0040	Fares concessions	Supports discounted but not free child fares.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Rachel Stanton		RPTP-0040	Fares concessions	Suggests making child fares discounted except for 1 day per week, when we have a free child travel day (e.g. Saturdays)	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Rachel Stanton		RPTP-0040	Community transport	Opposes community transport as a solution to the transport challenges in towns like Wānaka, Cromwell and Alexandra. More robust public transport is needed in these places.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Rachel Stanton		RPTP-0040	Central Otago service	Request for public transport services beyond community transport and Total Mobility be introduced to Cromwell and Alexandra. Suggestion of Queenstown Airport connection routes to begin with.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Rachel Stanton		RPTP-0040	Upper Clutha service	Request for public transport services beyond community transport and Total Mobility be introduced to Wānaka. Suggestion of Queenstown Airport connection routes to begin with.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Small changes to network maps to indicate priority for Wānaka connection
Rachel Stanton		RPTP-0040	Fares base fare	Reluctantly supports an increase to the base fare to \$2.50 if it is required to maintain services.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Rachel Stanton		RPTP-0040	Fares zones	Supports a zone fare structure as long as it remains affordable for people outside central areas. Particularly supports zone fares between major centres.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Eli Blackwood		RPTP-0041	Community transport	Supports community transport as it helps connect smaller towns and rural areas	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Eli Blackwood		RPTP-0041	Frequency	Wants increased bus frequencies on the weekend from hourly to half-hourly	No changes to RPTP - noting	We agree that low frequencies on weekends are a deficiency in the current Dunedin network, and our plan includes an ambition to lift weekend services to full frequencies. However we are not currently in a position to fund such improvements.	We agree that low frequencies on weekends are a deficiency in the current Dunedin network, and our plan includes an ambition to lift weekend services to full frequencies. However we are not currently in a position to fund such improvements.	
Eli Blackwood		RPTP-0041	Fares base fare	Thinks increasing adult Bee card fares is logical, but fares need to be low to keep patronage up	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Eli Blackwood		RPTP-0041	Fares zones	Supports zone fares, but the price is important. The difference between a 50c increase and \$1 increase definitely adds up	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Katherine Ward		RPTP-0042	Fares concessions	Children should pay the same as adults. They take up space and often force adults to stand. People who choose to send children a longer distance instead of local schools should pay the cost	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Katherine Ward		RPTP-0042	Fares concessions	It's fair to standardise concessions between Dunedin and Queenstown.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Katherine Ward		RPTP-0042	Bus drivers	Bus drivers are nice and helpful	No changes to RPTP - operational	Noted with thanks	Noted with thanks	
Katherine Ward		RPTP-0042	Capacity	Crowding from school travel makes getting home tough	No changes to RPTP - noting	Route capacity will continue to be a consideration in our design of routes and timetables.	Route capacity will continue to be a consideration in our design of routes and timetables.	
Katherine Ward		RPTP-0042	Reliability	Buses are regularly 15-20 minutes later making them hard to rely on	No changes to RPTP - noting	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	
Katherine Ward		RPTP-0042	Fares concessions	Maintain fare affordability for beneficiaries.	No changes to RPTP - base fare decision		The existing Community Connect concession, which gives 50% off fares, will be maintained.	
Katherine Ward		RPTP-0042	Fares zones	Don't price out people who live in Palmerston.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Rachel Kennedy		RPTP-0043	Community transport	Supports community transport services giving people better access to healthcare services (e.g. hospital appointments).	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Rachel Kennedy		RPTP-0043	Frequency	Request for more frequent bus services (lives in Dunedin).	No changes to RPTP - noting	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Rachel Kennedy		RPTP-0043	Collaboration with institutions	Request for increasing parking fees and introducing road user fees to subsidise public transport and induce mode shift.	Change to RPTP	Parking charges are set by our TAs, however we agree that parking and congestion pricing can significantly influence and impact public transport. We have included a section on parking management, and will strengthen language on congestion pricing.	Parking charges are set by our TAs, however we agree that parking and congestion pricing can significantly influence and impact public transport. We have included a section on parking management, and will strengthen language on congestion pricing.	Minor changes in language in Plan.
Rachel Kennedy		RPTP-0043	Fares base fare	Opposes an increase to all fares because it will disincentivise mode shift and result in worse environmental outcomes.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Rachel Kennedy		RPTP-0043	Fares base fare	Opposes any fare increases because public transport will become unaffordable for lower income people.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Nick Graham		RPTP-0044	Bikes on buses	Wants bike racks back on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Nick Graham		RPTP-0044	Wayfinding	Does not like the Transit app due to inconsistent GPS tracking	No changes to RPTP - noting	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	
Nick Graham		RPTP-0044	Fares base fare	Opposes increased adult Bee card fares due to lower patronage	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Nick Graham		RPTP-0044	Fares zones	Supports zone fares, so long as the fares are not substantive increases over short distances	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
L Y		RPTP-0045	Fares concessions	Asking children to pay half price fares would be easier, it would generate revenue that could improve the service	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
L Y		RPTP-0045	Fares base fare	Only increase fares if you can make improvements to service, e.g. more evening trips or real time improvement	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
L Y		RPTP-0045	Timetables	Requests evening service after 6pm for to Palmerston	No changes to RPTP - noting	Our plan emphasises achieving greater frequencies and service spans over time. However, under current funding constraints we are not able to commit to such improvements.	Our plan emphasises achieving greater frequencies and service spans over time. However, under current funding constraints we are not able to commit to such improvements.	
L Y		RPTP-0045	Fares zones	Zones are confusing, some people who don't take the bus don't realise how easy it is to take the bus now that it's flat fares.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Dave Bainbridge-Zafar		RPTP-0046	Fares base fare	<p>charging a fare. Believes public transport should be free for everyone in Dunedin due to its environmental, public health, social equity and economic benefits. Free fares would improve parking availability, traffic congestion, bus trip times, road safety, affordability for low income people, bus patronage, Dunedin's attractiveness to tourists, transport-related greenhouse gas emissions, etc.</p> <p>Note that several statistics cited are inaccurate or out of date. We infer this letter was addressed to ORC Councillors in 2022 ahead of the 7 December 2022 Council meeting, at which the submitter spoke in public forum. Inaccuracies include:</p> <ul style="list-style-type: none">- Malta introduced free bus fare for people with bus cards but still charged cash fares. The submitter cites this happening last month, but it happened in 2022.- In Hasselt, Belgium, public transport was free from 1997 to 2014. Free fares ended due operating costs outsizing revenue.	No changes to RPTP - noting	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	
Kathryn van Beek		RPTP-0047	Dunedin bus hub	Safety around the bus hub, particularly at night, is important. Submitter said they felt unsafe at the bus hub at night when their bus didn't turn up and there was not an update as to where their bus was	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	
Kathryn van Beek		RPTP-0047	Rail and ferries	Supports trains and rail (not for tourists) as a priority	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Kathryn van Beek		RPTP-0047	Fares base fare	Opposes raising adult Bee card fares and believes public transport should be free for all, or very cheap	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Kathryn van Beek		RPTP-0047	Fares zones	Opposes zone fares and thinks it will penalise people who live further away	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Sam Mehrstens		RPTP-0048	Fares base fare	Keep fares at \$2	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sam Mehrstens		RPTP-0048	Fares zones	It's fair to pay more to travel further	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jennifer Erakovic		RPTP-0049	Oamaru service	Request for bus services between Dunedin-Oamaru.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Jennifer Erakovic		RPTP-0049	Clutha service	Request for bus services between Dunedin-Balclutha.	No changes to RPTP - noting	These services are included in this Plan as integral services for Otago, but availability of funding will dictate timing of such improvements.	These services are included in this Plan as integral services for Otago, but availability of funding will dictate timing of such improvements.	
Jennifer Erakovic		RPTP-0049	Fares base fare	Supports a base fare increase to \$2.50 if it provides the revenue adequate to fund services from Dunedin to Balclutha and Oamaru.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jennifer Erakovic		RPTP-0049	Fares zones	Supports a zone fare structure, but only if fares for longer trips increase moderately.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Anne-Marie Hutton		RPTP-0050	Fares concessions	Supports free fares for children, but only for going to and from school	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Anne-Marie Hutton		RPTP-0050	General	Submitter mentions that buses provide an essential part of Dunedin's life, and that customers should find them affordable and safe	No changes to RPTP	Noted with thanks	Noted with thanks	
Anne-Marie Hutton		RPTP-0050	Bus drivers	Submitted mentioned bus drivers do a great job	No changes to RPTP - operational	Noted with thanks	Noted with thanks	
Anne-Marie Hutton		RPTP-0050	Fares base fare	Supports increasing adult Bee card fares as the increase is small	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Anne-Marie Hutton		RPTP-0050	Fares zones	Opposes zone fare structure due to perceived complexity	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Austin Milne		RPTP-0051	Fares concessions	Make youth concessions 50% so that it's simpler	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Austin Milne		RPTP-0051	Fares concessions	Under-12s should pay a small fare so they get used to paying	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Austin Milne		RPTP-0051	Fares base fare	Accepts fare increases if improvements to service are occurring.	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Austin Milne		RPTP-0051	Focus areas	Needs focus on convenience under passenger experience	No changes to RPTP - noting	Our full plan includes convenience as a key consideration under Focus area 1: Passenger Experience. Convenience is also a key aspect of network design in Focus area 4: A connected and integrated network.	Our full plan includes convenience as a key consideration under Focus area 1: Passenger Experience. Convenience is also a key aspect of network design in Focus area 4: A connected and integrated network.	
Austin Milne		RPTP-0051	Pets on buses	Make it easier to take pets on buses. People without cars should have the same freedoms as those with. Could adopt a policy of full muzzles like Auckland, and have to get off bus if a guide dog gets on. Could charge a fare to pets.	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Austin Milne		RPTP-0051	Fares zones	Accepts higher fares for long trips but there should also be lower fares for very short trips	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Mark Kane		RPTP-0052	Community transport	Supports ORC having a role in supporting community transport services. Believes more robust public transport than just community transport services is needed through our region.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Mark Kane		RPTP-0052	Rail and ferries	Requests rail connections to smaller towns and rural areas be used to provide public transport services.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to improve connectivity and access for smaller towns.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Mark Kane		RPTP-0052	Vehicles smaller	Request to use different sizes of buses at different times of day (e.g. peak vs. off-peak) as a means of reducing operating costs.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips; it is not good value for money to maintain separate fleets for different times of day.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Mark Kane		RPTP-0052	Fares base fare	Opposes any increase to fares. Requests public transport be funded 100% by targeted rates, so fares are free and areas without public transport do not subsidise the service.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Hanna Lynch		RPTP-0053	Bikes on buses	The ban on bike racks was extremely disruptive and even contributed to the submitter to buying a car	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Hanna Lynch		RPTP-0053	Fares concessions	Supports maintaining free fares for children	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Hanna Lynch		RPTP-0053	Community transport	Supports community transport as it enables people to get around without the burden of car ownership	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	

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Hanna Lynch		RPTP-0053	Reliability	Submitter mentioned struggles with inconsistency, missed buses and the lack of buses in 5 Mile	No changes to RPTP - noting	Service improvements recommended in the Queenstown Public Transport Business case are included in the plan and funded; we are seeking to implement these improvements.	Service improvements recommended in the Queenstown Public Transport Business case are included in the plan and funded; we are seeking to implement these improvements.	
Hanna Lynch		RPTP-0053	Frequency	Wants more frequent and more reliable buses in Queenstown.	No changes to RPTP - noting	Service improvements recommended in the Queenstown Public Transport Business case are included in the plan and funded; we are seeking to implement these improvements.	Service improvements recommended in the Queenstown Public Transport Business case are included in the plan and funded; we are seeking to implement these improvements.	
Hanna Lynch		RPTP-0053	Fares base fare	Opposes increases to adult Bee card fares, unless there is a local monthly rate available to make it affordable for daily bus users (e.g. fare caps)	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Hanna Lynch		RPTP-0053	Fares zones	Opposes zone fare structure due to fairness for people living further away	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Lyn McLaren		RPTP-0054	Routes	Mosgiel bus should continue along Hagart-Alexander Drive to serve new developments in Highland Park	No changes to RPTP	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	
Amanda Elrick		RPTP-0055	Community transport	Would prefer to see public transport improvements in highly populated areas before focusing on smaller towns and rural areas. This includes deprioritising supporting community transport in favour of urban public transport.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Amanda Elrick		RPTP-0055	Fares concessions	Request to introduce a fare-capping system, for example, for people who take public transport multiple times per year to Dunedin for hospital appointments.	No changes to RPTP - noting	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	
Amanda Elrick		RPTP-0055	Public information	Requests greater promotion of public transport to locals to generate patronage.	No changes to RPTP - noting	Focus area 1: Passenger experience includes increased emphasis on promotion, publicity and education activities. Policy BM P2 pg26 and actions 1-4.	Focus area 1: Passenger experience includes increased emphasis on promotion, publicity and education activities. Policy BM P2 pg26 and actions 1-4.	
Amanda Elrick		RPTP-0055	Fares local/tourists	Supports a base fare increase to \$2.50, but believes tourists should be charged more than locals.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Amanda Elrick		RPTP-0055	Central Otago service	Request for public transport services to be introduced from Queenstown to Cromwell.	No changes to RPTP - noting	Public transport links between Cromwell and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	Public transport links between Cromwell and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	
Amanda Elrick		RPTP-0055	Upper Clutha service	Request for public transport services to be introduced from Queenstown to Wanaka.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection

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Amanda Elrick		RPTP-0055	Focus areas	Supports focus areas but has concern the plan is too ambitious. Would prefer to see fewer commitments that are well informed and can be guaranteed.	No changes to RPTP - noting	We have tried to balance the strategic nature of the plan, and the high expectations our community has for public transport, with the constraints of our funding and operating environment. We understand that the balance may not be perfect.	We have tried to balance the strategic nature of the plan, and the high expectations our community has for public transport, with the constraints of our funding and operating environment. We understand that the balance may not be perfect.	
Amanda Elrick		RPTP-0055	Fares zones	Requests understanding fare prices before forming an opinion on introducing a zone fare structure.	No changes to RPTP - base fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Hayleigh Plumb		RPTP-0056	Routes	Implement a service via the back of Queenstown Airport	No changes to RPTP - noting	A service via the back of the airport is not currently part of Queenstown Public Transport Business Case planned improvements, but can be considered in future route planning in the area subject to our service design principles in SD P1 pg51	A service via the back of the airport is not currently part of Queenstown Public Transport Business Case planned improvements, but can be considered in future route planning in the area subject to our service design principles in SD P1 pg51	
Hayleigh Plumb		RPTP-0056	Routes	Extend Queenstown Route 4 to Glenda Drive using layover time in timetable	No changes to RPTP - noting	This will not be possible due to route 4 being changed under upcoming improvements	This will not be possible due to route 4 being changed under upcoming improvements	
Hayleigh Plumb		RPTP-0056	Timetables	Wants logical timetabling	No changes to RPTP - noting	We will be working to implement service improvements under the Queenstown Public Transport Business Case. As frequencies increase we will be shifting timetables from a timed-transfer model (where buses all serve the Frankton Hub at the same time to allow fast transfers) to a combined frequency model (where buses serve the Frankton Hub at separate times, to give a headway of 7.5 minutes or less on the Frankton Road	We will be working to implement service improvements under the Queenstown Public Transport Business Case. As frequencies increase we will be shifting timetables from a timed-transfer model (where buses all serve the Frankton Hub at the same time to allow fast transfers) to a combined frequency model (where buses serve the Frankton Hub at separate times, to give a headway of 7.5 minutes or less on the Frankton Road	
Hayleigh Plumb		RPTP-0056	Frequency	Submitter mentions concerns about routes in Queenstown. Thinks there should be a 15 minute gap between routes 5 and 3 in QT. Also wants more services for routes 2 and 4 during peak morning and evening times	No changes to RPTP - noting	We will be working to implement service improvements under the Queenstown Public Transport Business Case. As frequencies increase we will be shifting timetables from a timed-transfer model (where buses all serve the Frankton Hub at the same time to allow fast transfers) to a combined frequency model (where buses serve the Frankton Hub at separate times, to give a headway of 7.5 minutes or less on the Frankton Road	We will be working to implement service improvements under the Queenstown Public Transport Business Case. As frequencies increase we will be shifting timetables from a timed-transfer model (where buses all serve the Frankton Hub at the same time to allow fast transfers) to a combined frequency model (where buses serve the Frankton Hub at separate times, to give a headway of 7.5 minutes or less on the Frankton Road	
Hayleigh Plumb		RPTP-0056	Fares base fare	Opposes raising adult Bee card fares and thinks fares are expensive if travelling multiple times throughout the day	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Hayleigh Plumb		RPTP-0056	Fares zones	Opposes zone fares because they don't believe the distances travelled are long enough	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ralph-Peter Hendriks		RPTP-0057	Bikes on buses	Restore bike racks on buses before winter.	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Ralph-Peter Hendriks		RPTP-0057	Fares base fare	Low fares encourage usage. Supports free fares; they would save money on ticketing equipment	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Ralph-Peter Hendriks		RPTP-0057	Bus drivers	Many drivers are too fast, some too slow. Teach them to drive smoothly	No changes to RPTP - operational	This comment will be passed to the Operations team	This comment will be passed to the Operations team	
Ralph-Peter Hendriks		RPTP-0057	Pets on buses	Allow dogs on a leash on buses.	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Ralph-Peter Hendriks		RPTP-0057	Focus areas	Focus on the basics like comfort	No changes to RPTP - noting	We agree that it is important to get the basics right.	We agree that it is important to get the basics right.	
Matthew Jenks		RPTP-0058	Fares concessions	Supports free child (5-12 years) fares to. Free fares make public transport more affordable for low income families. Affordability for children enhances freedom and independence. Free fares also attract families away from driving private vehicles.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Matthew Jenks		RPTP-0058	Focus areas	Supports focus areas and the policies of public transport being affordable, high quality, electrified, frequent, reliable and meet the needs of all users.	No changes to RPTP	Noted with thanks	Noted with thanks	
Matthew Jenks		RPTP-0058	Vehicles electric	Praise that the bus fleet is being electrified due to it improving air pollution, public health and the climate.	No changes to RPTP	Noted with thanks	Noted with thanks	
Matthew Jenks		RPTP-0058	Bus drivers	Praise for Dunedin bus drivers for driving safely around cyclists.	No changes to RPTP - operational	Thank you, this feedback will be passed to operators	Thank you, this feedback will be passed to operators	
Matthew Jenks		RPTP-0058	Fares base fare	Opposes an increase to the base fare because it may make public transport unaffordable for low income people. Understands the fares are increasing due to reduced Central Government funding for public transport.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Matthew Jenks		RPTP-0058	Fares zones	Supports a zone fare structure, but believes public transport outside central urban areas must remain affordable, frequent and reliable to make it a better option than private vehicles.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Deborah Waerea		RPTP-0059	Fares concessions	Supports keeping child fares free	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Deborah Waerea		RPTP-0059	Fares concessions	Supports standardising youth concessions	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Deborah Waerea		RPTP-0059	Fares base fare	Supports 50c increase to adult Bee fare card	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Deborah Waerea		RPTP-0059	Fares zones	Opposes zone fare due to fairness for people living further away and potential for being confusing	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Erika Buky		RPTP-0060	Dunedin Airport service	Asks for an Dunedin airport bus. Very hard to get to airport from Peninsula and considers that current airport shuttle operators could be involved	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Erika Buky		RPTP-0060	Bikes on buses	Get bike racks back on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Erika Buky		RPTP-0060	Frequency	Wants a move towards half-hourly services for the Peninsula -- hourly is inadequate	No changes to RPTP - noting	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies on this route, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies on this route, but these improvements are not currently funded and any improvements would be minor at present.	
Erika Buky		RPTP-0060	Frequency	Prioritise service levels over electric buses -- thinks that the environmental benefits are greater	No changes to RPTP - noting	Our plan emphasises that fleet emissions are only a small part of the environmental benefits of public transport: there are wider benefits in mode-shift and more efficient land-use patterns.	Our plan emphasises that fleet emissions are only a small part of the environmental benefits of public transport: there are wider benefits in mode-shift and more efficient land-use patterns.	
Erika Buky		RPTP-0060	Fares base fare	Supports free fares to encourage families to use the bus together instead of driving, and to improve congestion/safety at school start/end	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	
Erika Buky		RPTP-0060	Fares base fare	Accepts that there's a need in current policy environment to increase fares, but we should consider evidence base for benefits of free buses.	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	
Erika Buky		RPTP-0060	Fares zones	Flat fare seems fair and accessible for people and also businesses, and reduces hardship for non-drivers. Acknowledges they have some bias as they would be paying 2-zone fares	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Carol Jamieson		RPTP-0061	Community transport	Opposes community transport if it has a high budget, is inadequately researched and uses unnecessarily large buses.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	

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Carol Jamieson		RPTP-0061	Vehicles electric	Opposes electrifying bus fleet because of the negative environmental impacts of building and disposing of lithium batteries. Believes it is an unnecessary cost to ratepayers.	No changes to RPTP - noting	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	
Carol Jamieson		RPTP-0061	Ticketing system	Opposes the national ticketing system replacing the Bee Card. Believes it is unnecessary and costly.	No changes to RPTP - noting	It is an NZTA requirement for ORC to adopt the national ticketing solution. We would not be in a position to withdraw from the national ticketing system at this stage, and withdrawal may jeopardise future central government funding.	It is an NZTA requirement for ORC to adopt the national ticketing solution. We would not be in a position to withdraw from the national ticketing system at this stage, and withdrawal may jeopardise future central government funding.	
Carol Jamieson		RPTP-0061	Focus areas	Supports safety as a priority in light of the violence at the Dunedin bus hub, graffiti and general antisocial behaviour.	No changes to RPTP	Noted with thanks	Noted with thanks	
Carol Jamieson		RPTP-0061	Fares base fare	Supports a base fare increase so ratepayers do not have to subsidise public transport.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Carol Jamieson		RPTP-0061	Fares base fare	Believes base fare should rise to \$3 to remove the need for ratepayers to subsidise public transport and to adequately fund services.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Carol Jamieson		RPTP-0061	Fares concessions	Supports Community Services cardholders paying lower fares.	No changes to RPTP		This will continue.	
Carol Jamieson		RPTP-0061	Fares zones	Supports zone fares as a 'user pays' model of funding public transport.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Marion Jamieson		RPTP-0062	Vehicles smaller	Submitter mentions that the buses are too big relative to the size of the roads, and that buses often run empty. They want smaller buses for lower patronage routes, such as the ridge runner	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Marion Jamieson		RPTP-0062	Fares base fare	Opposes adult Bee card fare increases as that might result in lower patronage	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Marion Jamieson		RPTP-0062	Fares zones	Supports moving to a zone fare structure	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Jenny Duncan		RPTP-0063	Fares concessions	Not necessary to be consistent between Dunedin and Queenstown on concession levels	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jenny Duncan		RPTP-0063	Timetables	Coordinate timetables in places like South Dunedin where multiple routes coincide, to increase combined frequencies.	No changes to RPTP - noting	The importance of coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	The importance of coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	
Jenny Duncan		RPTP-0063	Reliability	Improve timetable reliability	No changes to RPTP - noting	We agree it is important to design timetables that deliver good reliability, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	We agree it is important to design timetables that deliver good reliability, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	
Jenny Duncan		RPTP-0063	Routes	Wants to see a bus route on Cumberland St stopping outside Otago University	No changes to RPTP - noting	We do not currently have plans to operate a bus route along the one-way in North Dunedin. The plan's service design principles discourage the use of one-way streets where two-way streets are available.	We do not currently have plans to operate a bus route along the one-way in North Dunedin. The plan's service design principles discourage the use of one-way streets where two-way streets are available.	
Jenny Duncan		RPTP-0063	Fares zones	Short typical trip lengths mean that users will be sensitive to fares	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jenny Duncan		RPTP-0063	Fares zones	Accepts higher fares for longer trips but it shouldn't be a focus	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Robert ORCHISTON		RPTP-0064	Dunedin Airport service	Request for service from Dunedin City Centre to the Dunedin Airport at least an hourly frequency. There should at least be a Mosgiel-Airport service. This would enable airport staff to commute and those travelling to not have to rely on the private shuttle services.	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money.	
Robert ORCHISTON		RPTP-0064	Fares concessions	Opposes charging youth (13-18 years) a fare. Fares should be free for everyone 18 and under.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Robert ORCHISTON		RPTP-0064	Fares base fare	Opposes all fare increases because public transport should be free or extremely affordable for all users. It should instead be heavily subsidised by higher targeted rates. If users pay, it should be very affordable and by distance.	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Robert ORCHISTON		RPTP-0064	Fares zones	Opposes the proposed zone fare structure, but supports charging more for longer trips. Trips should be charged on a per kilometre basis, with shorter trips having a higher per kilometre cost and longer trips having a lower per kilometre cost.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Duane Donovan		RPTP-0066	Regional services	Enhance regional services due to hospital access, including use of technology.	No changes to RPTP - noting	Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	
Duane Donovan		RPTP-0066	Fares concessions	Accepts free trips for under-12s due to poor peak usage	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Duane Donovan		RPTP-0066	Frequency	More frequent inner-city services; half-hourly gaps are too long	No changes to RPTP - noting	Our plan gives emphasis to enhancing Frequent service where possible., however the current funding constraints are a limitation and this will not always be possible.	Our plan gives emphasis to enhancing Frequent service where possible., however the current funding constraints are a limitation and this will not always be possible.	
Duane Donovan		RPTP-0066	Timetables	Asks for better scheduling. The two routes servicing Kaikorai leave at the same time making it a 30 min service rather than 15 min. Also scheduled run times not achievable in peak.	No changes to RPTP - noting	The importance of reliable buses, is captured in the plan. Good timetable design is a core principle of the network design chapter of the Plan. However some level of early and late running is unavoidable.	The importance of reliable buses, is captured in the plan. Good timetable design is a core principle of the network design chapter of the Plan. However some level of early and late running is unavoidable.	
Duane Donovan		RPTP-0066	General	Eliminate any "social or wellness" clauses in tendering. Focus needs to be on best price for service package, not social engineering.	No changes to RPTP - noting	The Plan outlines that our procurement approach (section 6.3) including compliance and accordance with NZTA Procurement Manual and ORC's Transport Activities Procurement strategy.	The Plan outlines that our procurement approach (section 6.3) including compliance and accordance with NZTA Procurement Manual and ORC's Transport Activities Procurement strategy.	
Duane Donovan		RPTP-0066	Active transport	Link regional services to bike trail hubs	Change to RPTP	This is a consideration in our regional-level thinking and Public and Active connectivity strategy outlined in the Multi-modal access section of the plan.	This is a consideration in our regional-level thinking and Public and Active connectivity strategy outlined in the Multi-modal access section of the plan.	check if any policies could be amended to reference this explicitly?
Duane Donovan		RPTP-0066	Routes	Improve cross-town / orbital travel options -- travelling through centre of town can be a very long trip	No changes to RPTP - noting	We agree that it is important to consider non-radial travel patterns, but note that there are limitations to what can be achieved within budget constraints.	We agree that it is important to consider non-radial travel patterns, but note that there are limitations to what can be achieved within budget constraints.	
Duane Donovan		RPTP-0066	Wayfinding	Asks for a simpler real-time tracking	No changes to RPTP	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	We are committed to continuous improvement of our real-time information and how it is presented in the Transit App or any other future data consumers	
Duane Donovan		RPTP-0066	Vehicles electric	Supports electrification but unsure if grid can support it	No changes to RPTP - noting	We do not currently have any major concerns about the impact of electrification on the electrical grid.	We do not currently have any major concerns about the impact of electrification on the electrical grid.	
Duane Donovan		RPTP-0066	Focus areas	Doesn't understand "Build trust", just wants to see buses on time	No changes to RPTP - noting	We understand the importance of reliable buses, and this is captured in the plan. Some level of early and late running is however unavoidable. Good timetable design is a core principle of the network design chapter of the Plan	We understand the importance of reliable buses, and this is captured in the plan. Some level of early and late running is however unavoidable. Good timetable design is a core principle of the network design chapter of the Plan	
Duane Donovan		RPTP-0066	Timetables	Coordinate timetables better -- e.g. routes 37 and 61 timetabled at the same time so no combined frequency effect	No changes to RPTP - noting	While in any one location there are constraints that may limit the coordination of timetables, the point is understood. Coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	While in any one location there are constraints that may limit the coordination of timetables, the point is understood. Coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	

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Duane Donovan		RPTP-0066	Fares zones	Fares should be as flat as possible; increased fares only past urban area (e.g. Waitati, Mosgiel)	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Duane Donovan		RPTP-0066	Fares base fare	Accept fare increases are needed -- the longer we wait the worse the increase will be when we have to make it	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Dave Goosselink		RPTP-0067	Vehicles smaller	Request to use smaller buses on less popular routes and at off peak times to lower costs.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Dave Goosselink		RPTP-0067	Fares base fare	Supports a base fare increase to \$2.50. Would support greater fare increases to meet the cost of provision and decrease public transport's reliance on rates.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Maggie Riley		RPTP-0069	Clutha service	Wants to see a bus to Gore -- similar to current Palmerston service	No changes to RPTP - noting	A regional service into Southland is included in our 10-30 year aspirational map for the regional network.	A regional service into Southland is included in our 10-30 year aspirational map for the regional network.	
Maggie Riley		RPTP-0069	Bikes on buses	Requests restoration of bike racks	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Maggie Riley		RPTP-0069	Routes	Requests a bus "up Normanby" (unclear what is meant by this)	No changes to RPTP - noting	Request is unclear. However, we do not currently have any plans to extend the Normanby service coverage. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	Request is unclear. However, we do not currently have any plans to extend the Normanby service coverage. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	
Maggie Riley		RPTP-0069	Fares concessions	Wants to see cheap rides for community service card holders.	No changes to RPTP - noting	This is currently in place: Community Service Card holders are eligible for half-price fares through the Community Connect scheme.	This is currently in place: Community Service Card holders are eligible for half-price fares through the Community Connect scheme.	
Maggie Riley		RPTP-0069	Pets on buses	Allow dogs on buses.	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Maggie Riley		RPTP-0069	Fares zones	Accepts slightly higher fares for trips out of town like Palmerston.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Bronwyn Brock		RPTP-0071	Fares concessions	Supports standardised concessions for children across Dunedin and Queenstown	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Bronwyn Brock		RPTP-0071	Funding	Submitter doesn't believe ORC can afford public transport	No changes to RPTP - noting	Our current bus networks serve a vital role in our communities and perform well in financial and patronage terms relative to comparable cities nationally.	Our current bus networks serve a vital role in our communities and perform well in financial and patronage terms relative to comparable cities nationally.	
Bronwyn Brock		RPTP-0071	General	Miscellaneous concerns with ORC spending related to cost of new building and number of staff	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	

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Jobimol Jenin		RPTP-0072	Timetables	Focus on improving weekend service, especially start/end times. First/last trips often are too late/early for shifts	No changes to RPTP - noting	We agree -- this is supported by our Fares and Frequencies Business Case for Dunedin. This recommends extending service hours to meet shift workers, especially at Dunedin Hospital. Improving these service hours is a target in this plan, however we caution that we are limited in what we can achieve in this area in the immediate future due to funding constraints.	We agree -- this is supported by our Fares and Frequencies Business Case for Dunedin. This recommends extending service hours to meet shift workers, especially at Dunedin Hospital. Improving these service hours is a target in this plan, however we caution that we are limited in what we can achieve in this area in the immediate future due to funding constraints.	
Jasper Mooij		RPTP-0073	Focus areas	Opposes focus areas. Public transport investment in Queenstown is not resulting in faster travel times.	No changes to RPTP - noting	Queenstown's public transport network is seeing high patronage and issues with capacity. Our work shows that there is significant demand and our document outlines how we plan to meet this demand.	Queenstown's public transport network is seeing high patronage and issues with capacity. Our work shows that there is significant demand and our document outlines how we plan to meet this demand.	
Jasper Mooij		RPTP-0073	General	Request evaluation of public transport routes' effectiveness in Queenstown. It should not take 1 hour from Kelvin Heights or Lake Hayes to travel to the Queenstown town centre.	No changes to RPTP - noting	We have recently undertaken a Business Case and have plans for extensive service improvements in Queenstown, which will significantly improve frequencies, connectivity, and travel times.	We have recently undertaken a Business Case and have plans for extensive service improvements in Queenstown, which will significantly improve frequencies, connectivity, and travel times.	
Tania Dickson		RPTP-0074	Fares concessions	Doesn't support free child fares, and thinks \$1.20 a trip is affordable	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Tania Dickson		RPTP-0074	Community transport	Think community transport is a 'great idea'	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Tania Dickson		RPTP-0074	Fares base fare	Support small fare increases, contingent on having more reliable services	No changes to RPTP - noting	Link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Tania Dickson		RPTP-0074	Reliability	Concerns about Queenstown bus reliability. Timetables are inaccurate.	No changes to RPTP - noting	The importance of reliable buses, is captured in the plan. Good timetable design is a core principle of the network design chapter of the Plan. However some level of early and late running is unavoidable.	The importance of reliable buses, is captured in the plan. Good timetable design is a core principle of the network design chapter of the Plan. However some level of early and late running is unavoidable.	
Tania Dickson		RPTP-0074	Fares zones	Support zone fares	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Nic L		RPTP-0075	School services	Free school buses	No changes to RPTP - noting	Child and youth concession value decision. Also noting school buses run by MOE are funded with public sources which compromises government's expectation for PTAs to increase private share of operating cost.	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	
Nic L		RPTP-0075	Fares concessions	Discounts for disability card holders	No changes to RPTP - noting	Community Service cardholders are able to access half price fares through the Community Connect scheme.	Community Service cardholders are able to access half price fares through the Community Connect scheme.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Nic L		RPTP-0075	Funding	Seek funding from multiple sources to maintain affordability	No changes to RPTP - noting	Our value for money section of the plan includes investigating feasible alternative private funding.	Our value for money section of the plan includes investigating feasible alternative private funding.	
Nic L		RPTP-0075	Safety	Improve safety for passengers and staff	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	
Nic L		RPTP-0075	Fares base fare	Higher fares will discourage usage	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Christelle Mendoza		RPTP-0076	Routes	Request to add buses on Hawthorne drive, connecting Remarkables Park more directly to Five Mile.	No changes to RPTP - noting	A service via the back of the airport is not currently part of Queenstown Public Transport Business Case planned improvements, but can be considered in future route planning in the area subject to our service design principles in SD P1 pg51	A service via the back of the airport is not currently part of Queenstown Public Transport Business Case planned improvements, but can be considered in future route planning in the area subject to our service design principles in SD P1 pg51	
Christelle Mendoza		RPTP-0076	Routes	Request to change Route 5 in Queenstown to improve coverage of the west side of Shotover Country.	No changes to RPTP - noting	Changes in this area are not currently planned. While we can consider this in future reviews, it should be noted that service design principles emphasise direct routing, and it will be difficult to justify extending services in this area, especially as we move towards increased frequencies.	Changes in this area are not currently planned. While we can consider this in future reviews, it should be noted that service design principles emphasise direct routing, and it will be difficult to justify extending services in this area, especially as we move towards increased frequencies.	
Sarah Jane		RPTP-0077	Bikes on buses	Concerned about no bikes on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Sarah Jane		RPTP-0077	Fares local/tourists	Supports fare increases, particularly for tourists.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Sarah Jane		RPTP-0077	Fares local/tourists	Support for increasing transport costs for tourists	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Sarah Jane		RPTP-0077	Frequency	Wants more reliable and frequent bus services, particularly later in the evenings	No changes to RPTP - noting	Our target service levels include improvements to evening and weekend frequencies, in line with the Fares and Frequencies Business Case. However, we are constrained by the current funding environment	Our target service levels include improvements to evening and weekend frequencies, in line with the Fares and Frequencies Business Case. However, we are constrained by the current funding environment	
Sarah Jane		RPTP-0077	Fares zones	Opposes zone fares because it will increase costs for locals.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Diane Cooney		RPTP-0078	Fares base fare	Accepts need to increase fares. Supports lower youth fares and thinks that without subsidy they would pick up children in car.	No changes to RPTP - base fare decision	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds. No change to Plan:The base adult fare will be \$2.50 across Otago. There will be a uniform 40% concession for 5-18 year olds.	
Diane Cooney		RPTP-0078	General	Found the document easy to read and clear	No changes to RPTP	Noted with thanks	Noted with thanks	
Diane Cooney		RPTP-0078	Reliability	Reliability has improved in recent years	No changes to RPTP	Noted with thanks	Noted with thanks	
Diane Cooney		RPTP-0078	Wayfinding	Transit app is very good	No changes to RPTP	Noted with thanks	Noted with thanks	
Diane Cooney		RPTP-0078	School services	Improve connections from Waverley/Shiel Hill to South Dunedin schools	No changes to RPTP - noting	Our priority for the Waverley/Shiel Hill area is to attain Frequent service standards. We acknowledge that school travel is a significant part of the demand for travel in this area and our planned shift onto Macandrew Road will get routes closer to South Dunedin schools.	Our priority for the Waverley/Shiel Hill area is to attain Frequent service standards. We acknowledge that school travel is a significant part of the demand for travel in this area and our planned shift onto Macandrew Road will get routes closer to South Dunedin schools.	
Diane Cooney		RPTP-0078	Dunedin bus hub	Improve safety at Dunedin Bus Hub. Children are taking bus at Hospital instead of Hub due to safety concerns.	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Diane Cooney		RPTP-0078	Fares zones	Thinks it makes sense to charge more for longer trips in line with other cities.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sarani Pakan		RPTP-0079	Fares base fare	Opposes a base fare increase. Supports lowering fares.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sarani Pakan		RPTP-0079	Fares zones	Supports users paying more for longer trips. Fares should increase on a per-stop basis, not a per-zone basis.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Cherie Brown		RPTP-0080	Vehicles smaller	Wants more frequent and smaller buses, including to the Peninsula.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Cherie Brown		RPTP-0080	Fares zones	Supports zone fares, but zones need to incorporate longer distances, such as Brighton and Karitane, but not local suburban areas like Peninsula and Mosgiel	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Cara Smith		RPTP-0081	Fares concessions	Supports continued free fares for under-12s	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Cara Smith		RPTP-0081	Fares concessions	Would prefer there to not be a concession for under-18s -- same as adult fares	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Cara Smith		RPTP-0081	Fares base fare	Difficult to accept fare increases when peak buses are often late and full	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Cara Smith		RPTP-0081	School services	Would like to see school buses come back	No changes to RPTP - noting	Our plan includes a new policy with regards to targeted services such as school buses. Although we aim to serve trips on our integrated all-day services where possible, targeted services may be provided where they serve trips that cannot reasonably be made through other services.	Our plan includes a new policy with regards to targeted services such as school buses. Although we aim to serve trips on our integrated all-day services where possible, targeted services may be provided where they serve trips that cannot reasonably be made through other services.	
Cara Smith		RPTP-0081	Vehicles smaller	Reduce bus sizes in off-peak times	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Cara Smith		RPTP-0081	Fares zones	Opposes zonal fares on the basis of simplicity and attractiveness of services	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
A Walton		RPTP-0082	Oamaru service	Request for a local public transport service in Oamaru, particularly so students can travel to school more easily.	Change to RPTP	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
A Walton		RPTP-0082	Fares base fare	Support for base fare increase to \$2.50 so users are paying for a greater share of public transport costs.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Thomas Firth		RPTP-0083	Bikes on buses	Concerns about bike racks on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Thomas Firth		RPTP-0083	Bus priority	Suggests we should have bus-only lanes on busy rights, giving buses priority at traffic lights, and considering closing roads to all cars except buses and delivery vehicles	No changes to RPTP - noting	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT and coordinate work programmemes.	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT and coordinate work programmemes.	
Thomas Firth		RPTP-0083	Fares concessions	Thinks children should also pay, but that the fares should be low	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Thomas Firth		RPTP-0083	Fares concessions	Supports standardising the concessions in DUD and QT	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Thomas Firth		RPTP-0083	Fares base fare	For employed adults, fares below \$10 are suitable and should be below car park rates	No changes to RPTP - base fare decision	Noting link to parking pricing	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Thomas Firth		RPTP-0083	Frequency	Thinks public transport should be more viable by ensuring buses are frequent and time coordinated.	No changes to RPTP - noting	Our service design principles and network layering outlined in Focus area 4 supports this.	Our service design principles and network layering outlined in Focus area 4 supports this.	
Thomas Firth		RPTP-0083	Focus areas	Thinks the current focus areas do not reflect the integration of public transport into the broader community	No changes to RPTP - noting	Thanks for the comment -- we would support the intent of what you are asking for here and would hope that this is reflected in the full plan.	Thanks for the comment -- we would support the intent of what you are asking for here and would hope that this is reflected in the full plan.	
Thomas Firth		RPTP-0083	Regional services	Regional buses need to be direct to be viable	No changes to RPTP - noting	There is a need to balance trip times with other considerations such as serving key locations, and reliability. These are challenging trade-offs and with limited funding there will be a need for compromises in places, but we note your point about the value of directness	There is a need to balance trip times with other considerations such as serving key locations, and reliability. These are challenging trade-offs and with limited funding there will be a need for compromises in places, but we note your point about the value of directness	
Thomas Firth		RPTP-0083	Funding	Suggests public transport should be funded through health, environment, business and community initiatives, particularly as central government is providing less funding	No changes to RPTP - noting	We agree that it is important to consider all possible sources of funding in order to improve the financial viability of our existing service levels, and of service improvements. However, we also acknowledge that there will be limitations on what we can achieve: there is significant competition for government and private funding in all sectors.	We agree that it is important to consider all possible sources of funding in order to improve the financial viability of our existing service levels, and of service improvements. However, we also acknowledge that there will be limitations on what we can achieve: there is significant competition for government and private funding in all sectors.	
Thomas Firth		RPTP-0083	Fares zones	Potentially supports zone fares, but thinks a cost-benefit analysis is necessary. Fares are very low at the moment and could potentially be increased, but not to the degree that it will cause people to drive	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Valerie Bartlett		RPTP-0084	Wayfinding	Concerned about how On-Demand will work for elderly people not good with cell phone.	No changes to RPTP - operational	This is a key consideration in our implementation and we will be working to ensure the service is as accessible as possible for all users.	This is a key consideration in our implementation and we will be working to ensure the service is as accessible as possible for all users.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Camille Miller		RPTP-0085	Vehicles electric	Believes electric buses should not be a priority because they cost more, have a worse environmental impact and are less safe than combustion engine buses.	No changes to RPTP - noting	<p>Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB).</p> <p>Cost -- our recent experience does not support this; new electric-bus contracts are increasingly cost-competitive.</p> <p>Environmental impact -- NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon.</p> <p>Safety -- we have no evidence of significant concerns about the safety of electric buses compared to diesel buses.</p> <p>Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our current needs in most cases.</p>	<p>Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB).</p> <p>Cost -- our recent experience does not support this; new electric-bus contracts are increasingly cost-competitive.</p> <p>Environmental impact -- NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon.</p> <p>Safety -- we have no evidence of significant concerns about the safety of electric buses compared to diesel buses.</p> <p>Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our current needs in most cases.</p>	
Camille Miller		RPTP-0085	Timetables	Request to prioritise more accurate timetables at peak times so drivers do not have to make unsafe decisions to remain on schedule (e.g. speeding or running red lights). Preference for reduced frequencies if it means lengthening tight timetables.	No changes to RPTP - noting	Our service design principles include principles of ensuring accurate running times. We note the comment about the preference for reduced frequencies rather than tight timetables; we agree that there is a balance to be had between the two and that the benefits of frequency are lost when it cannot be delivered reliably.	Our service design principles include principles of ensuring accurate running times. We note the comment about the preference for reduced frequencies rather than tight timetables; we agree that there is a balance to be had between the two and that the benefits of frequency are lost when it cannot be delivered reliably.	
Camille Miller		RPTP-0085	Fares base fare	Supports a base fare increase to \$2.50 if it is required to maintain services.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sarah Connolly		RPTP-0086	Fares concessions	Supports free fares for children and maintaining consistent concessions in DUD and QT	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sarah Connolly		RPTP-0086	School services	Wants more capacity for school bus services bringing students from the Peninsula to Bayfield/Kings High School.	No changes to RPTP - noting	Route capacity will continue to be a consideration in our design of routes and timetables.	Route capacity will continue to be a consideration in our design of routes and timetables.	
Sarah Connolly		RPTP-0086	Focus areas	Thinks the Value for Money section does not adequately consider the wider community benefits of public transport	Change to RPTP	The last paragraph of the Value for money intro speaks to not losing sight of the community and social benefits of PT. We also have tried to capture the wider benefits throughout the document. Suggest adding a Benefits heading before the last three paragraphs of pg. 80	The last paragraph of the Value for money intro speaks to not losing sight of the community and social benefits of PT. We also have tried to capture the wider benefits throughout the document. Suggest adding a Benefits heading before the last three paragraphs of pg. 80	Add a 'Benefits' heading before the last three paragraphs of pg. 80.
Sarah Connolly		RPTP-0086	Frequency	Wants increased frequency of Route 18 to the Peninsula.	No changes to RPTP - noting	We are aware that the Peninsula service sees a high peak loading and will consider this in future development of its timetable	We are aware that the Peninsula service sees a high peak loading and will consider this in future development of its timetable	
Sarah Connolly		RPTP-0086	Fares base fare	Opposes fare increases on the grounds that it may make public transport less attractive	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Sarah Connolly		RPTP-0086	Fares zones	Opposes zone fares on the ground that people living in those areas have fewer travel options, and if they drive it could lead to more congestion and parking	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
rachel stubbs		RPTP-0087	Clutha service	Supports public transport in Clutha district, it's a difficult choice to live without a car in these areas. Wants to be able to take day trips to Balclutha	No changes to RPTP - noting	These services are included in this Plan as integral services for Otago, but we do not currently have funding for such improvements.	These services are included in this Plan as integral services for Otago, but we do not currently have funding for such improvements.	
rachel stubbs		RPTP-0087	Fares base fare	Supports increase in fares to help cover costs	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
rachel stubbs		RPTP-0087	Fares zones	Supports zonal fares like in Australia	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Frederique Gulcher		RPTP-0088	Community transport	Supports ORC having a role in community transport services. It will enable people in rural areas without their own transport can travel equitably. Seasonal workers without cars would particularly benefit. Also supports community transport services because they create community connections.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Frederique Gulcher		RPTP-0088	General	Praise for the Dunedin bus service improvements over the last several years. The perception of public transport, and therefore patronage, are improving as a result.	No changes to RPTP	Noted with thanks	Noted with thanks	
Frederique Gulcher		RPTP-0088	Focus areas	Request to continue to make public transport accessible and affordable for all.	No changes to RPTP - base fare decision	Our plan supports these goals.	Our plan supports these goals.	
Frederique Gulcher		RPTP-0088	Fares base fare	Opposes a base fare increase due to the cost of living being high enough.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Frederique Gulcher		RPTP-0088	Fares zones	Supports a zone fare structure, but would like the service to remain affordable for those who live outside central areas.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Victoria Fisk		RPTP-0089	Fares base fare	Opposes adult fare increases as it could make fewer people ride the bus	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Victoria Fisk		RPTP-0089	Fares zones	Opposes zone fare structure because it could cost more people on a low income	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Andrew Wicken		RPTP-0090	Fares base fare	Make public transport free to improve usage	No changes to RPTP - noting	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	
Tina Sleigh		RPTP-0091	Bikes on buses	Requests bike racks be reinstated.	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Tina Sleigh		RPTP-0091	Bus priority	Requests bus lanes be introduced to improve travel times, induce mode shift and realise better environmental outcomes.	No changes to RPTP - noting	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT and coordinate work programmemes.	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT and coordinate work programmemes.	
Tina Sleigh		RPTP-0091	Fares concessions	Opposes free child (5-12 years) fares and \$1.50 youth (13-18 years) fares. Suggests \$1 for both age groups.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Tina Sleigh		RPTP-0091	Vehicles electric	Does not support focus areas due to the commitment to electrify the bus fleet. Believes electric buses are too expensive, unreliable, unsustainable. Would prefer diesel buses remain but bus lanes are introduced to induce mode shift and reduce transport's environmental impact.	No changes to RPTP - noting	<p>Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB).</p> <p>We acknowledge the point that the greatest environmental benefits of public transport are not in the fleet impact, but in the mode shift and land use impacts of good public transport. We consider the benefits of fleet electrification to be secondary to this, and our plan represents this; however battery-electric buses are cost-effective and performing well, and we plan to continue the roll-out.</p> <p>NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.</p>	<p>Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB).</p> <p>We acknowledge the point that the greatest environmental benefits of public transport are not in the fleet impact, but in the mode shift and land use impacts of good public transport. We consider the benefits of fleet electrification to be secondary to this, and our plan represents this; however battery-electric buses are cost-effective and performing well, and we plan to continue the roll-out.</p> <p>NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.</p>	
Jo Davison		RPTP-0092	Fares concessions	Thinks children under 10 should be free, but over 10 should pay half price fares	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jo Davison		RPTP-0092	Fares base fare	Supports adult bee fare increases	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jo Davison		RPTP-0092	Fares zones	Supports zone fare structure because it costs council more to run longer trips	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Karen Bosworth		RPTP-0093	Regional services	Implement public transport service for Outram	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. This service is signalled in the Plan, however at present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. This service is signalled in the Plan, however at present there is no funding available for such a service.	
Chris Pepper		RPTP-0094	Fares concessions	Supports free child fares but would prefer them to be nationally standardised.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Chris Pepper		RPTP-0094	General	Request for nationalised public transport system (not just the ticketing system, but fares).	No changes to RPTP - noting	NZTA sets direction of fare policy through the NZTA Regional Public Transport development guidelines. Concession types are set nationally, however concession and fare value are a PTA decision. Otago has some of the lowest fares nationally.	NZTA sets direction of fare policy through the NZTA Regional Public Transport development guidelines. Concession types are set nationally, however concession and fare value are a PTA decision. Otago has some of the lowest fares nationally.	
Chris Pepper		RPTP-0094	General	Concerns with inefficient government spending.	No changes to RPTP	Our plan supports value for money in delivering public transport	Our plan supports value for money in delivering public transport	
Chris Pepper		RPTP-0094	Collaboration with institutions	Request for greater coordination between ORC and TAs.	No changes to RPTP - noting	We have a positive and constructive relationship with territorial authorities. All parties in these relationships are aiming to further improve our coordination and efficiency in delivering public transport, and this intent is represented in Focus area 2 of our Plan.	We have a positive and constructive relationship with territorial authorities. All parties in these relationships are aiming to further improve our coordination and efficiency in delivering public transport, and this intent is represented in Focus area 2 of our Plan.	
Chris Pepper		RPTP-0094	Fares zones	Supports a zone fare structure pending the base fare is affordable.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Logan McClennan		RPTP-0095	Fares concessions	Thinks child concession should be 75% discount	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Logan McClennan		RPTP-0095	Fares base fare	Supports adult bee fare increase, but not more than \$2.50	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Paul Johnston		RPTP-0096	Fares concessions	People paying age-based concessions should stand for adults	No changes to RPTP - noting	Although in many cases it is reasonable to ask for younger people to stand for older people, we would expect this to be on the basis of differences in physical mobility, not the fare being paid.	Although in many cases it is reasonable to ask for younger people to stand for older people, we would expect this to be on the basis of differences in physical mobility, not the fare being paid.	
Paul Johnston		RPTP-0096	Fares concessions	Supports free fares only for under-5s	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Paul Johnston		RPTP-0096	Dunedin Bus Hub	Considers Dunedin Hub to be dangerous	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	
Paul Johnston		RPTP-0096	Routes	Restore buses to old central Dunedin alignments	No changes to RPTP - noting	The future of central city operations in Dunedin is yet to be determined but we acknowledge the point and will give full consideration to options when we review central city operations.	The future of central city operations in Dunedin is yet to be determined but we acknowledge the point and will give full consideration to options when we review central city operations.	
Paul Johnston		RPTP-0096	Vehicles smaller	Consider smaller buses	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Paul Johnston		RPTP-0096	Fares base fare	A small increase in fares would reduce council debt	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Paul Johnston		RPTP-0096	Fares zones	Support for fares that change with distance, longer trips are too cheap	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Neill Matthews		RPTP-0097	Oamaru service	Request for regular and reliable Oamaru-Dunedin service to meet the needs of Oamaru/Waitaki residents with medical appointments in Dunedin. Even if people with Dunedin medical appointments do own cars, many are ageing and do not feel comfortable driving the long distance themselves.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Neill Matthews		RPTP-0097	Fares zones	Opposes a zone fare structure because it will disincentivise mode shift. This will worsen congestion and parking availability.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Erika Astried		RPTP-0098	Fares concessions	Supports standardising concessions in QT and DUD	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Erika Astried		RPTP-0098	Fares concessions	Doesn't think many children age 5-12 use the bus and that they should not get free fares	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Erika Astried		RPTP-0098	General	Thinks buses have technical issues, such as tap card not working, doors not shutting, unfriendly drivers, bad timetables	No changes to RPTP - operational	Concerns noted, and part of our contract performance with operators	Concerns noted, and part of our contract performance with operators	
Erika Astried		RPTP-0098	Fares base fare	Opposes adult bee card fare increases and thinks \$2 is a fair price	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Erika Astried		RPTP-0098	Fares zones	Supports zone fare structure	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tracey Kearns		RPTP-0099	Dunedin Airport service	Values a Dunedin Airport connection	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded.	
Tracey Kearns		RPTP-0099	Oamaru service	Supports an Oamaru-Dunedin service.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Deirdre Caswell		RPTP-0100	Safety	Request to assess street lighting around stops to improve passenger visibility	No changes to RPTP - noting	Support investigation into lighting improvements as part of wider consideration of bus stop quality.	Support investigation into lighting improvements as part of wider consideration of bus stop quality.	
Deirdre Caswell		RPTP-0100	Reliability	Request to address Dunedin's Route 3 chronic reliability issues. This includes late buses disappearing off the Transit app.	No changes to RPTP - noting	We acknowledge that a few routes in Dunedin, such as route 3, see poor timetable performance, especially in the afternoon peak. We are seeking to identify solutions to this issue.	We acknowledge that a few routes in Dunedin, such as route 3, see poor timetable performance, especially in the afternoon peak. We are seeking to identify solutions to this issue.	

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Deirdre Caswell		RPTP-0100	Fares base fare	Supports a base fare increase if it enables drivers to be paid a living wage.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago. Our contracts include a Base Wage Requirement in order to ensure that the previously seen downward pressure on wages does not undermine the sustainability of the service and the attractiveness of bus driver jobs. The currently defined Base Wage is significantly above the Living Wage and is expected to remain so.	
Deirdre Caswell		RPTP-0100	Fares zones	Opposes a zone fare structure because it will make public transport less accessible for people who live far from central areas.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jill Hetherington		RPTP-0101	Fares concessions	Supports free child fares because it is good for children to learn to use the bus and to help families who can't afford it	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jill Hetherington		RPTP-0101	Fares concessions	Supports standardising concessions in DUD and QT subject to cost benefit analysis	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jill Hetherington		RPTP-0101	Community transport	For community transport, we should first listen to local communities	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Jill Hetherington		RPTP-0101	Reliability	Wants buses that are safe and run on time, but we don't need a gold standard bus experience. Should balance reliability and practicalities	No changes to RPTP	Thank you -- this comment fairly represents the balance we aim to seek in how we deliver our services	Thank you -- this comment fairly represents the balance we aim to seek in how we deliver our services	
Jill Hetherington		RPTP-0101	Fares base fare	Supports adult bee card fare increase, but only increase by a little bit	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jill Hetherington		RPTP-0101	Fares zones	Opposes zone fare structure due to potential complexities around zones	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jim Bourne		RPTP-0102	Bus priority	Would like to see more focus on bus lanes to reduce congestion	No changes to RPTP - noting	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	
Jim Bourne		RPTP-0102	Fares concessions	Supports free fares for under-12s to minimise school congestion	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jim Bourne		RPTP-0102	Routes	Would like to see a service connecting Frankton, Shotover/Lake Hayes, Arrowtown, and back to Queenstown via Arthurs Point	No changes to RPTP - noting	Under the Queenstown Public Transport Business Case improvements, an Arrowtown - Queenstown will be added. We expect this to be entering operation around the time this plan is finalised.	Under the Queenstown Public Transport Business Case improvements, an Arrowtown - Queenstown will be added. We expect this to be entering operation around the time this plan is finalised.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Jim Bourne		RPTP-0102	Pets on buses	Make it easier to take pets on the bus -- crate/cage requirement is challenging when bus stops are a long way apart in Queenstown	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Jim Bourne		RPTP-0102	Fares zones	Does not support increased fares with distance on popular routes	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Elizabeth Todd		RPTP-0103	Fares concessions	Request for day or week public transport passes to cap fares for frequent users.	No changes to RPTP - noting	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	
Elizabeth Todd		RPTP-0103	Funding	Supports greater advertising to increase revenue, for instance with digital screens on board buses.	No changes to RPTP	Noted with thanks	Noted with thanks	
Elizabeth Todd		RPTP-0103	Fares local/tourists	Request for tourists to be charged higher fares than locals.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Elizabeth Todd		RPTP-0103	Timetables	Transfers can be challenging as timetables do not always align	No changes to RPTP - noting	One of our key service design principles in our plan is to design timetables to enable seamless transfers, to the extent possible.	One of our key service design principles in our plan is to design timetables to enable seamless transfers, to the extent possible.	
Elizabeth Todd		RPTP-0103	Frequency	Request for greater service frequencies than 30 minutes, longer service hours, and more frequent weekend timetables.	No changes to RPTP - noting	Our plan gives emphasis to improving frequencies and service hours, in line with the Fares and Frequencies Business Case. However, the current funding constraints are a limitation and this will not always be possible.	Our plan gives emphasis to improving frequencies and service hours, in line with the Fares and Frequencies Business Case. However, the current funding constraints are a limitation and this will not always be possible.	
Elizabeth Todd		RPTP-0103	Bus stop infrastructure	Request to add more bus stop shelters to improve waiting experience.	No changes to RPTP - noting	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with DCC to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with DCC to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	
Elizabeth Todd		RPTP-0103	Marketing, promotion, engagement	Request to seek feedback in-person from bus users, for instance at bus hubs.	No changes to RPTP - follow up action	Thank you for your feedback. This will be considered when planning future public consultation.	Thank you for your feedback. This will be considered when planning future public consultation.	
Elizabeth Todd		RPTP-0103	Regional services	Request to consider on-demand public transport for times and areas that buses do not cover.	No changes to RPTP - noting	We agree that on-demand has a role to play in supporting the public transport network. However we caution that the operating cost can be quite significant and extensive on-demand services are not within current budget.	We agree that on-demand has a role to play in supporting the public transport network. However we caution that the operating cost can be quite significant and extensive on-demand services are not within current budget.	
Elizabeth Todd		RPTP-0103	Wayfinding	Request to improve the Transit app's reliability.	No changes to RPTP - operational	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	

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Elizabeth Todd		RPTP-0103	Funding	Opposes focus areas because value for money should be a greater priority. Does not want to see public transport services be reduced, but would like to see value added to the services and revenue generated in ways that do not add burden to frequent local users.	No changes to RPTP - noting	We feel there is a strong emphasis on value for money in the plan. Focus area 5 includes policies and actions to improve third-party revenue in order to supplement fare revenue, however we do expect fare revenue to still be the predominant revenue that reduces the cost of service to ratepayers.	We feel there is a strong emphasis on value for money in the plan. Focus area 5 includes policies and actions to improve third-party revenue in order to supplement fare revenue, however we do expect fare revenue to still be the predominant revenue that reduces the cost of service to ratepayers.	
Elizabeth Todd		RPTP-0103	Fares base fare	Opposes increase in base fare to \$2.50. Would like to see more frugal ORC spending in other areas to enable fares to remain low.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Elizabeth Todd		RPTP-0103	Fares zones	Does not support a zone fare structure that charges more for trips within an urban area. Would only support higher fares for regional connections, such as to Oamaru. Would also support higher fares for services during week nights and weekends if it would fund them being more frequent.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Christine Canty		RPTP-0104	Fares base fare	Cares most about getting more people on buses. Supports increasing adult bee card fares if it means putting on more bus services	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Christine Canty		RPTP-0104	Fares zones	Thinks zone fare structure is fair	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kimberly Cousins		RPTP-0105	Fares concessions	Wants to see free fares up to age 18	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Kimberly Cousins		RPTP-0105	General	Does not support services being delivered through private companies	No changes to RPTP - noting	We acknowledge the interest in public control of PT services, but ORC does not currently possess capability to move in this direction and is not currently able to make a commitment to move in this direction in the future. We note that ORC has control of service specifications and operations occur under tightly specified service contracts.	We acknowledge the interest in public control of PT services, but ORC does not currently possess capability to move in this direction and is not currently able to make a commitment to move in this direction in the future. We note that ORC has control of service specifications and operations occur under tightly specified service contracts.	
Kimberly Cousins		RPTP-0105	Funding	Would prefer to see public transport funded by increasing parking fees to disincentivise private vehicle usage. Increased fares will reduce usage and undermine benefits of PT	No changes to RPTP - noting	We agree parking charges are important in incentivising reduced private vehicle use. However parking charges are set by our Territory Authorities. Further collaboration and work is required to understand how parking charges can contribute to funding public transport.	We agree parking charges are important in incentivising reduced private vehicle use. However parking charges are set by our Territory Authorities. Further collaboration and work is required to understand how parking charges can contribute to funding public transport.	
Kimberly Cousins		RPTP-0105	Regional services	Wants to see a broader consideration of transport issues in the region and the role of public transport in solving these issues	No changes to RPTP - noting	We undertake such consideration on a regular basis through the RLTP, business cases and other processes. We will continue to do so in the future, and we will continue to seek to improve how we undertake such work.	We undertake such consideration on a regular basis through the RLTP, business cases and other processes. We will continue to do so in the future, and we will continue to seek to improve how we undertake such work.	

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Kimberly Cousins		RPTP-0105	Fares zones	Opposes a zonal system because it will reduce usage; people sometimes live further out because it is cheaper	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kaitlyn Hughes		RPTP-0106	Fares base fare	Opposes a base fare increase to \$2.50 because it would make them more unaffordable.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Kaitlyn Hughes		RPTP-0106	Fares zones	Opposes a zone fare structure because the previous zone system did not work well.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Regan Hayward		RPTP-0107	Fares base fare	Opposes raising adult bee card fares for people under 20 and over 60, but between those ages an extra 50 cent raise is okay	No changes to RPTP - base fare decision	Noting link to age of bus users	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Regan Hayward		RPTP-0107	Regional services	Wants public transport to Outram. Many older people are cancelling appointments because they can't get a ride to Mosgiel	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. This service is signalled in the Plan, however at present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. This service is signalled in the Plan, however at present there is no funding available for such a service.	
Regan Hayward		RPTP-0107	Fares zones	Opposes zone fare structure because people living further away would have to pay more	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Cyndi Christensen		RPTP-0108	Oamaru service	Requests local public transport service in Oamaru in order to provide an essential public service and reduce traffic congestion	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
Cyndi Christensen		RPTP-0108	Fares zones	Supports increased fares for distance, if it helped keep base fares lower	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Gary Patefield		RPTP-0109	Fares zones	People choose where to live: we shouldn't subsidise everyone	No changes to RPTP - noting	We agree with the point, and our plan gives importance to land-use considerations which would support focusing PT investment on areas where PT performs well and drives growth/development.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Marc Byers		RPTP-0111	Fares concessions	Supports free fares for under 12s	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Marc Byers		RPTP-0111	Fares base fare	Opposes fare increases as they will reduce usage when the goal is to improve usage	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
JOHANNE Kington		RPTP-0112	Fares concessions	Opposes keeping a free child (5-12 years) fare because it is not fair for people.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
JOHANNE Kington		RPTP-0112	Focus areas	Supports focus areas, specifically our priority to increase patronage.	No changes to RPTP	Noted with thanks	Noted with thanks	
David Allard		RPTP-0113	Central Otago service	Thinks public transport won't work in Central Otago and should let private enterprise take care of transport, including through self-driving cars	No changes to RPTP - noting	We agree that there are limitations to what we can expect to achieve with public transport in Central Otago due to land-use patterns and a dispersed population, but we do not accept that there is no role for public transport.	We agree that there are limitations to what we can expect to achieve with public transport in Central Otago due to land-use patterns and a dispersed population, but we do not accept that there is no role for public transport.	
Diana Baker		RPTP-0114	Bikes on buses	Restore availability of bike racks	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Diana Baker		RPTP-0114	Routes	Add a bus route along Malaghans Road	No changes to RPTP - noting	We are implementing such a route in July this year.	We are implementing such a route in July this year.	
Zoe Martin		RPTP-0115	Community transport	Supports ORC having a role in supporting community transport, particularly for services connecting Wanaka and Bobs Cove to Queenstown.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Zoe Martin		RPTP-0115	Frequency	Request for services to be more connected and frequent for Arrowtown.	No changes to RPTP - noting	Improved public transport services are in our Queenstown Public Transport Business Case programmeme, and the first improvements will be beginning in July.	Improved public transport services are in our Queenstown Public Transport Business Case programmeme, and the first improvements will be beginning in July.	
Zoe Martin		RPTP-0115	Frequency	Request for more frequent services throughout the Queenstown network to address congestion and free up parking.	No changes to RPTP - noting	Improved public transport services are in our Queenstown Public Transport Business Case programmeme, and the first improvements will be beginning in July.	Improved public transport services are in our Queenstown Public Transport Business Case programmeme, and the first improvements will be beginning in July.	
Zoe Martin		RPTP-0115	Fares local/tourists	Request for Queenstown tourists to get free public transport funded by higher taxes on hotel/accommodation. This would reduce congestion.	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport. However we are also investigating new options to increase private share and funding of PT. Thank you for your suggestion.	Pg 86 of the plan contains an explanation for why we don't support free public transport. However we are also investigating new options to increase private share and funding of PT. Thank you for your suggestion.	
Zoe Martin		RPTP-0115	Fares base fare	Opposes a base fare increase to \$2.50. Would prefer for monthly/annual passes to be introduced to provide frequent users an low fare. This would also encourage mode shift to public transport.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Zoe Martin		RPTP-0115	Fares zones	Opposes a zone fare structure because it will disincentivise public transport use for people taking longer trips and not reduce traffic congestion.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Anthea Brown		RPTP-0116	Community transport	Supports community transport and thinks there should be a hospital shuttle service from Oamaru to Dunedin.	No changes to RPTP - noting	Community transport decision. Additionally Oamaru services are included in this Plan as integral services for Otago. However availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	No change from Draft Plan. The development of a Community Transport programme is supported.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Kate Whitehall		RPTP-0117	Reliability	Requests improved peak services in Arthurs Point, noting late running after-school	No changes to RPTP - noting	A new timetable will be beginning in July.	A new timetable will be beginning in July.	
Kate Whitehall		RPTP-0117	Fares concessions	Supports free fares for under-12s on the basis of family affordability; ideally extend it to 18	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Kate Whitehall		RPTP-0117	Fares base fare	Supports an increase in fares if it's reflected in improved performance and service levels, as well as driver breaks	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Kate Whitehall		RPTP-0117	Fares local/tourists	Consider a pass for locals, NZ residents, those on work visas	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Kate Whitehall		RPTP-0117	Reliability	Buses should not depart stops ahead of time	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Kate Whitehall		RPTP-0117	Marketing, promotion, engagement	Wants to see improvements to target community programmes and access to activities	No changes to RPTP - noting	We agree that serving key activity centres is an important service design principle, and this is included in the service design principles of our plan	We agree that serving key activity centres is an important service design principle, and this is included in the service design principles of our plan	
Kate Whitehall		RPTP-0117	Fares zones	Opposes higher fares for longer trips as it is discriminatory	No changes to RPTP - zone fare decision	We agree with the point, and our plan gives importance to land-use considerations which would support focusing PT investment on areas where PT performs well and drives growth/development.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kate Whitehall		RPTP-0117	School services	Give consideration to bus services around primary school times	No changes to RPTP - noting	We do already, and will continue to do so in the future. We have many factors that influence our timetables and we cannot meet all needs perfectly, but planned improvements to frequencies under the Queenstown Business Case will improve services for many users, including primary school students	We do already, and will continue to do so in the future. We have many factors that influence our timetables and we cannot meet all needs perfectly, but planned improvements to frequencies under the Queenstown Business Case will improve services for many users, including primary school students	
Martin Juneke		RPTP-0118	Vehicles electric	Praise for bus fleet electrification because it will improve air quality, especially in Dunedin City Centre.	No changes to RPTP	Noted with thanks	Noted with thanks	
Martin Juneke		RPTP-0118	Fares base fare	Opposes a base fare increase. Believes public transport should be cheaper than driving, and ideally should be free. Supports higher rates to subsidise more public transport services. This would incentivise mode shift and reduce congestion in city centres.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Becky Ladbrook		RPTP-0119	Vehicles electric	Opposes electric buses due to labour conditions, shelf life and disposal of batteries	No changes to RPTP - noting	Environmental impact -- NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our current needs in most cases.	Environmental impact -- NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our current needs in most cases.	
Becky Ladbrook		RPTP-0119	Regional services	Wants buses going to Wingatui	No changes to RPTP - noting	Request is unclear. Possibly relates to the scope of On-Demand services for Mosgiel.	Request is unclear. Possibly relates to the scope of On-Demand services for Mosgiel.	
Becky Ladbrook		RPTP-0119	Fares base fare	Supports increases to all fares, including for children and gold card holders	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Becky Ladbrook		RPTP-0119	Fares zones	Opposes zones because a single flat fare works very well	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jenny Chandler		RPTP-0120	Dunedin Airport service	Requests bus to Dunedin Airport	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money.	
Jenny Chandler		RPTP-0120	Bikes on buses	Would like to see bike racks restored to usage	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Jenny Chandler		RPTP-0120	Public information	Supports the Bee Card and transit app, it could be more widely advertised with teaching sessions for people	No changes to RPTP - noting	Focus area 1 of the plan gives increased emphasis to outreach activities	Focus area 1 of the plan gives increased emphasis to outreach activities	
Jenny Chandler		RPTP-0120	Ticketing system	Would like to see an option for a flat automatic payment, rather than at a fare threshold	No changes to RPTP - noting	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	
Jenny Chandler		RPTP-0120	Timetables	Would like more accurate timetables, notes they often see bus bunching	No changes to RPTP - noting	Our plan includes updated service design principles that will support improvements to timetables.	Our plan includes updated service design principles that will support improvements to timetables.	
Jenny Chandler		RPTP-0120	Focus areas	More focus on making it easy to live without a car	Change to RPTP	Thank you for your very valid point. We agree and suggest we build it into Objective 3 to read: Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and development.	Thank you for your very valid point. We agree and suggest we build it into Objective 3 to read: Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and development.	Change Objective 3 to 'Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and development'
Jenny Chandler		RPTP-0120	Rail and ferries	Would like to see rail reinstated to connect the wider region	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes

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Jenny Chandler		RPTP-0120	Fares base fare	Thinks that the higher usage and keeping current fares will have a better revenue impact than higher fares	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jenny Chandler		RPTP-0120	Fares zones	It seems fair to pay more for longer trips	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
anaka nielsen vold		RPTP-0121	Ticketing system	Request for ticketing system to enable payment by debit cards for the same price as the Bee Card.	No changes to RPTP - noting	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments.	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments.	
anaka nielsen vold		RPTP-0121	Operations	Request to improve bus cleanliness.	No changes to RPTP - operational	Will pass feedback to operators	Will pass feedback to operators	
Irena Jackson		RPTP-0123	Fares local/tourists	Requests increased fares for tourists	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Irena Jackson		RPTP-0123	Upper Clutha service	Supports regional services -- thinks it's crazy NZ doesn't have such services -- e.g. Wanaka/Queenstown	No changes to RPTP - noting	Our plan includes new regional routes. However, these are not currently funded. We note that in urban areas, more routes does not always mean more service -- it could just mean lower frequencies. See section 5.1 of the full p	Our plan includes new regional routes. However, these are not currently funded. We note that in urban areas, more routes does not always mean more service -- it could just mean lower frequencies. See section 5.1 of the full p	
Irena Jackson		RPTP-0123	Central Otago service	Supports regional services -- thinks it's crazy NZ doesn't have such services -- e.g. Cromwell/Queenstown	No changes to RPTP - noting	Our plan includes new regional routes. However, these are not currently funded. We note that in urban areas, more routes does not always mean more service -- it could just mean lower frequencies. See section 5.1 of the full p	Our plan includes new regional routes. However, these are not currently funded. We note that in urban areas, more routes does not always mean more service -- it could just mean lower frequencies. See section 5.1 of the full p	
Corwin Newall		RPTP-0124	Vehicles electric	Request for more EV charging infrastructure along State Highway 1 in the Clutha District.	No changes to RPTP - noting	Out of scope for this plan	Out of scope for this plan	
Corwin Newall		RPTP-0124	Rail and ferries	Request to incorporate trains into the public transport network. They would save money on road maintenance.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Corwin Newall		RPTP-0124	Active transport	Request to improve regional active transport connections, such as introducing protected or off-road bike lanes connecting Dunedin, Balclutha (via Milton) and Gore.	No changes to RPTP - noting	The Multi-modal access section in Focus area 4 of the plan supports increasing connectivity between active modes and public transport, and we will be working further on this. We will work with our TAs on infrastructure needs, however there is currently no co-funding with active mode investment..	The Multi-modal access section in Focus area 4 of the plan supports increasing connectivity between active modes and public transport, and we will be working further on this. We will work with our TAs on infrastructure needs, however there is currently no co-funding with active mode investment..	
Corwin Newall		RPTP-0124	Rail and ferries	Request to improve regional connectivity with public trains or buses between Dunedin and Clutha. Intercity does not provide adequate service.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Corwin Newall		RPTP-0124	Fares base fare	Support for base fare increase to \$2.50 and even \$3.50 to ensure services like public transport are maintained.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Eleanor Seabrook		RPTP-0125	Routes	Arrowtown bus should stop in Lake Hayes Estate/Shotover	No changes to RPTP - noting	We are not able to do this at present due to timetable constraints, but we acknowledge that as routes change with improved services under the Queenstown PT Business Case improvements, there will be opportunities to review routes and options for changing their connections.	We are not able to do this at present due to timetable constraints, but we acknowledge that as routes change with improved services under the Queenstown PT Business Case improvements, there will be opportunities to review routes and options for changing their connections.	
Eleanor Seabrook		RPTP-0125	Fares zones	Opposes zone fare structure in Queenstown because they say the distances are not far enough to warrant zones	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Terry Gaze		RPTP-0126	Vehicles smaller	Would like to see smaller, electric vehicles in Whakatipu	Change to RPTP	We will be transitioning to an electric fleet as we implement service improvements under the Queenstown PT Business Case. Small buses: While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips. See our explainer on small buses.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Terry Gaze		RPTP-0126	Fares base fare	Supports a fare increase, even \$3 would be fine	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
John Richards		RPTP-0127	Clutha service	Request for a Dunedin to Balclutha service to improve access for people living in small communities between them, especially for those who do not own a car.	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	
Gary Bedford		RPTP-0128	Routes	Supports a Mosgiel Park and Ride with buses leaving directly to the bus hub	No changes to RPTP	Noted with thanks	Noted with thanks	
marge D		RPTP-0129	Routes	Requests a stop near Barnes Dr/Rockside Terrace in Caversham (e.g. South Rd/SH1)	No changes to RPTP - operational	Thank you; The request has been noted for further consideration outside of this Plan	Thank you; The request has been noted for further consideration outside of this Plan	
marge D		RPTP-0129	Timetables	Earlier start times for services would help shift workers	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
marge D		RPTP-0129	Fares base fare	Sees a modest fare improvement as reasonable if it supports service improvements and driver wages	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
marge D		RPTP-0129	Fares zones	Higher fares for longer trips seems fair	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sarah Langley		RPTP-0130	Oamaru service	Request for a Dunedin to Oamaru service. This would provide better access to Dunedin Hospital appointments, improve Waitaki's attractiveness to visitors, and reduce congestion from locals making daily trips.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Sarah Langley		RPTP-0130	Fares base fare	Supports an increase in the base fare to \$2.50 because it is still exceptionally good value for money.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
katey jenks		RPTP-0131	Fares concessions	Requests free fares for 13-18 year olds	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
katey jenks		RPTP-0131	Community transport	Supports community transport as it can help people coming into town for hospital visit, particularly for people who can't drive	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
katey jenks		RPTP-0131	Routes	They enjoy Route 8.	No changes to RPTP	Noted with thanks	Noted with thanks	
katey jenks		RPTP-0131	Focus areas	Frequency and reliability is important for this person	No changes to RPTP	Thank you -- we agree and this is represented in our Service Design Principles in the full plan	Thank you -- we agree and this is represented in our Service Design Principles in the full plan	
katey jenks		RPTP-0131	Fares base fare	Opposes raises to adult bee card fares, thinks that more people on public transport is important	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
katey jenks		RPTP-0131	Fares zones	Opposes zone fare structure due to potential fairness issues around people living further away paying more	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sean Lennon		RPTP-0132	Fares concessions	Public transport should be free up to age 18, as people gain the habit of taking public transport	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sean Lennon		RPTP-0132	Fares base fare	Opposes fare increases due to the economic viability of public transport being undermined	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sean Lennon		RPTP-0132	Fares zones	Opposes zonal fares on the basis of legibility -- thinks it's one of the worst things we could do	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Georgie Hadfield		RPTP-0133	Community transport	Support for ORC having a role in supporting community transport services. Specifically recognises the benefit these services would have in Wanaka.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Georgie Hadfield		RPTP-0133	Fares base fare	Opposes a base fare increases. Bus fares should remain low so public transport can compete with private vehicles, be well-utilised, and be affordable essential service. Currently the \$2 fare makes carpooling with one other person cheaper than busing for their commute.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Oak Roberts		RPTP-0134	Reliability	Submitter says the Palmerston bus is not always reliable and doesn't turn up when it should at the bus hub	No changes to RPTP - noting	Our plan includes an action to set timetables that are based on realistic and achievable running times; we are aware that the Palmerston route has some issues and will be seeking to update these running times.	Our plan includes an action to set timetables that are based on realistic and achievable running times; we are aware that the Palmerston route has some issues and will be seeking to update these running times.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Oak Roberts		RPTP-0134	Frequency	Wants more frequency and reliability for buses, particularly up to date and reliable information	No changes to RPTP - noting	Our plan supports these goals.	Our plan supports these goals.	
Oak Roberts		RPTP-0134	Fares base fare	Wants to maintain \$2 fares	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Danika Boulay		RPTP-0135	Frequency	Would like to see the extra peak frequency in Arthurs Point extended in the morning	No changes to RPTP - noting	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	
Danika Boulay		RPTP-0135	Fares base fare	Increasing fares would be adding a barrier -- we should be making PT easier not harder to use	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Janine Race		RPTP-0136	Pets on buses	Request to change pets regulations to give more opportunities for adult passengers to travel with approved dogs outside peak times at a charge to be decided. This would increase patronage and improve experience.	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Tania Macaulay		RPTP-0137	Bus drivers	Thinks bus drivers should be more friendly	No changes to RPTP - operational	It is crucial that we attract and hold on to great drivers. Feedback will be passed on to the operators.	It is crucial that we attract and hold on to great drivers. Feedback will be passed on to the operators.	
Charlotte Rattray		RPTP-0138	Fares concessions	While most students can get concession fares through community services card, international students can't. Requests a concession for students without access to Community Connect	No changes to RPTP - base fare decision		We would be willing to support such a scheme with appropriate funding.	
Charlotte Rattray		RPTP-0138	Fares base fare	Accepts a fare increase for adults who can afford to pay, and is happy to pay increased fares when they have a fulltime job and can afford it	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jack Wynne		RPTP-0139	Focus areas	Request to prioritise the sustainable future of our bus network.	No changes to RPTP - noting	We agree with the sentiment	We agree with the sentiment	
Jack Wynne		RPTP-0139	Regional services	Request for services similar to Timaru (on-demand) in smaller centres.	No changes to RPTP - noting	<p>We are currently implementing an On-Demand service in Mosgiel.</p> <p>We will continue to consider opportunities for On-Demand services across our network, but we note that these services can come at a considerable cost. In some instances, a fixed-route solution will deliver better outcomes; in other cases where a full PT service is not viable, we will seek to support community vehicle trusts to support basic access for small communities.</p>	<p>We are currently implementing an On-Demand service in Mosgiel.</p> <p>We will continue to consider opportunities for On-Demand services across our network, but we note that these services can come at a considerable cost. In some instances, a fixed-route solution will deliver better outcomes; in other cases where a full PT service is not viable, we will seek to support community vehicle trusts to support basic access for small communities.</p>	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Jack Wynne		RPTP-0139	Fares zones	Supports a zone fare structure, but would like fares to remain low for urban trips and all fares to cost less than parking for all trips.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Lin Moir		RPTP-0140	Bus drivers	Impressed with bus drivers and thinks they are courteous with less abled people	No changes to RPTP - operational	Noted with thanks	Noted with thanks	
Lin Moir		RPTP-0140	Vehicles electric	Supports transition to electric buses	No changes to RPTP	Noted with thanks	Noted with thanks	
Lin Moir		RPTP-0140	Bus drivers	Thinks drivers should have more discretion, as they occasionally leave young people on the side of the road at night	No changes to RPTP - operational	Thank you; in general our drivers are asked to exercise reasonable discretion and such incidents are rare.	Thank you; in general our drivers are asked to exercise reasonable discretion and such incidents are rare.	
Jonathon Holmes-Welsh		RPTP-0141	Bus stop infrastructure	Would like to see a focus on upgrading stops in Queenstown which have no shelter	No changes to RPTP - noting	Our shelters in Queenstown are generally of high quality, and many instances where there are no shelters are due to local context making it difficult, or very low boarding numbers. However, we will continue to work with QLDC to implement infrastructure improvements including shelters	Our shelters in Queenstown are generally of high quality, and many instances where there are no shelters are due to local context making it difficult, or very low boarding numbers. However, we will continue to work with QLDC to implement infrastructure improvements including shelters	
Jonathon Holmes-Welsh		RPTP-0141	Upper Clutha service	Add a Wanaka - Queenstown service	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Jonathon Holmes-Welsh		RPTP-0141	Wayfinding	Add real-time information signage	No changes to RPTP - noting	We have rolled out real time information for major stops in Queenstown and Dunedin	We have rolled out real time information for major stops in Queenstown and Dunedin	
Jonathon Holmes-Welsh		RPTP-0141	Fares base fare	Opposes fare increases on the basis of cost of living being high in Queenstown, and poor infrastructure	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jonathon Holmes-Welsh		RPTP-0141	Fares zones	Increased fares with distance will undermine performance and lead to reduced service levels due to poor patronage	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jack Gray		RPTP-0142	Fares concessions	Request to consider fare capping alongside the base fare increase.	No changes to RPTP - noting	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	
Jack Gray		RPTP-0142	Safety	Request to continue prioritising safety to mitigate antisocial behaviour on buses.	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Jack Gray		RPTP-0142	Community transport	Request for community transport services to work like Timaru's MyWay on-demand service, which works well. Request to implement this type of service both in places with and without an urban bus network.	No changes to RPTP - noting	We are currently implementing an On-Demand service in Mosgiel. We will continue to consider opportunities for On-Demand services across our network, but we note that these services can come at a considerable cost. In some instances, a fixed-route solution.	We are currently implementing an On-Demand service in Mosgiel. We will continue to consider opportunities for On-Demand services across our network, but we note that these services can come at a considerable cost. In some instances, a fixed-route solution.	
Jack Gray		RPTP-0142	Fares base fare	Support for a base fare increase to \$2.50, but would like us to monitor the fare increase and undo it if it results in falling patronage.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Hazel Agnew		RPTP-0143	Clutha service	Requests a Dunedin-Balclutha service, as it will mean less reliance on private cars. There is also a need for people to get to Dunedin for hospital reasons, particularly with a rising population of retired people. Most people have to drive to Dunedin for appointments.	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	
Hazel Agnew		RPTP-0143	Oamaru service	Requests a Dunedin-Oamaru service, as it will mean less reliance on private cars. There is also a need for people to get to Dunedin for hospital reasons, particularly with a rising population of retired people. Most people have to drive to Dunedin for appointments.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Rachel Clucas		RPTP-0144	Fares concessions	Free services for kids are important -- would be happy to pay more as an adult	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Rachel Clucas		RPTP-0144	Fares concessions	Extend age for free fares to 16	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Edwin Keable		RPTP-0145	Fares concessions	Supports an 100% discount for child fares (5-12 years) and a 40% discount for youth fares (13-18 years) because it makes public transport more affordable for families.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Edwin Keable		RPTP-0145	Community transport	Supports ORC having a role in supporting community transport services as a means of developing minibus services linking smaller centres to each other and larger towns. This promotes peoples staying in smaller centres.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Edwin Keable		RPTP-0145	Fares base fare	Supports an increase in the base fare to \$2.50 because adult fares should go up before child fares.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Edwin Keable		RPTP-0145	Fares zones	Opposes a zone fare structure because low fares for smaller centres promotes people remaining in these towns (e.g. Palmerston).	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Warren Hurley		RPTP-0147	Community transport	Asks for On-Demand service for various communities in Dunedin, including South Dunedin, Brockville, NEV, Mosgiel, Outram	No changes to RPTP - noting	We are currently implementing an On-Demand service in Mosgiel. We will continue to consider opportunities for On-Demand services across our network, but we note that these services can come at a considerable cost, with limited capacity to move large numbers of people.	We are currently implementing an On-Demand service in Mosgiel. We will continue to consider opportunities for On-Demand services across our network, but we note that these services can come at a considerable cost, with limited capacity to move large numbers of people.	
Warren Hurley		RPTP-0147	Fares concessions	Start evening concession for Super Gold at 6:00pm as the peak has generally ended by this time	No changes to RPTP - noting	We are unable to implement the Super Gold concession due to government funding. We are not in a position to offer free travel where the government is not in a position to provide such funding.	We are unable to implement the Super Gold concession due to government funding. We are not in a position to offer free travel where the government is not in a position to provide such funding.	
Warren Hurley		RPTP-0147	Fares base fare	\$2.50 is reasonable given the good quality of service in Dunedin	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Warren Hurley		RPTP-0147	Fares zones	Supports more fares for longer distance -- car travel costs more by distance, so it makes sense for bus travel to as well	No changes to RPTP - base fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Michelle Watt		RPTP-0148	Fares concessions	Supports retaining free child fares as it enables families' access to school, extra-curricular and social activities	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Michelle Watt		RPTP-0148	Fares base fare	Opposes a base fare increase as a parent without a car, relying on public transport. Affordable public transport improves the family's quality of life and access to services/activities. Request for the working class and frequent bus users to not bear the burden of public transport's rising costs.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Michelle Watt		RPTP-0148	Fares zones	Opposes a zone fare structure because it will make longer trips unaffordable for people who rely on public transport and/or who do not live in the city centre.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Daryl Adam		RPTP-0149	Fares concessions	Supports retaining free child fares because otherwise would be expensive for families	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Daryl Adam		RPTP-0149	Routes	Submitter thinks the current Mosgiel loop routes do not integrate well with Dunedin services, particularly for commuters	No changes to RPTP - noting	From July we will be trialling an On-Demand service for Mosgiel. We look forward to hearing feedback on this service.	From July we will be trialling an On-Demand service for Mosgiel. We look forward to hearing feedback on this service.	

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Daryl Adam		RPTP-0149	Fares zones	Supports zone fare structure	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Daryl Adam		RPTP-0149	Fares base fare	Opposes fare increases because the fares need to be competitive with the price of driving	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Andrew Smith		RPTP-0150	Regional services	Requests a bus service for Outram	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Steve Johnson		RPTP-0151	Fares base fare	Opposes public transport having a fare as they believe it should be a free service. This would benefit the environment, society and tourism.	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	
Laura Smith		RPTP-0152	Fares local/tourists	Suggests that tourists pay a higher price than locals	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Laura Smith		RPTP-0152	Fares base fare	Supports increase in adult bee card fares as \$2 is quite cheap, but suggests there could be a local fare	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Laura Smith		RPTP-0152	Fares zones	Opposes zone fares as it will be costly for people living farther away.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Vicki Boon		RPTP-0153	Fares base fare	Supports higher fares so that users pay for more of the service cost	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Vicki Boon		RPTP-0153	Funding	Opposes funding public transport through general rates	No changes to RPTP - noting	The funding model for PT is established through the LTP and AP processes as well as NZTA policy	The funding model for PT is established through the LTP and AP processes as well as NZTA policy	
Vicki Boon		RPTP-0153	Fares zones	Higher fares for longer trips make sense	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Cherie BROWN		RPTP-0154	Dunedin Airport service	Request for an affordable service to Dunedin Airport, breaking the monopoly of private shuttles	No changes to RPTP - noting	A Balclutha to Dunedin service is an integral service in our plan and would serve the airport. However, we are not in a position to commit to a higher level of service targeting the airport. With regards to existing shuttle services, an unsuccessful bus service could undermine the viability of shuttle services and leave airport transport links worse-off; we note that there are airports in other cities with no regular shuttle service at all, while Dunedin has two operators.	A Balclutha to Dunedin service is an integral service in our plan and would serve the airport. However, we are not in a position to commit to a higher level of service targeting the airport. With regards to existing shuttle services, an unsuccessful bus service could undermine the viability of shuttle services and leave airport transport links worse-off; we note that there are airports in other cities with no regular shuttle service at all, while Dunedin has two operators.	
Cherie BROWN		RPTP-0154	Dunedin Airport service	Request for a public bus route to Dunedin Airport, which would be free for Supergold cardholders.	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money. Supergold is a national scheme set by central government	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money. Supergold is a national scheme set by central government	
Cherie BROWN		RPTP-0154	Rail and ferries	Request for a small electric light rail for more distant locations, such as Dunedin Airport.	No changes to RPTP - noting	We are not in a position to commit to such a action in this plan, but acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Cherie BROWN		RPTP-0154	General	Request for DCC to manage Dunedin's urban buses, while ORC manages regional and rural services.	No changes to RPTP - noting	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Division of responsibilities between regional and urban services would be problematic and would need to be resolved. Our plan is focused on further enhancing the collaborative and constructive working relationship that ORC has with territorial authorities.	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Division of responsibilities between regional and urban services would be problematic and would need to be resolved. Our plan is focused on further enhancing the collaborative and constructive working relationship that ORC has with territorial authorities.	
Cherie BROWN		RPTP-0154	Vehicles smaller	Request to run smaller buses on under-utilised routes.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Cherie BROWN		RPTP-0154	Fares zones	Supports zone fares as long as only the trips going outside city limits are charged more.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Mike Matthews		RPTP-0155	Fares base fare	Public transport should be free for everyone	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	

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Justina King		RPTP-0156	Vehicles electric	Is concerned, but unsure, about the environmental sustainability of lithium in battery-electric buses	No changes to RPTP - noting	Environmental impact -- NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our current needs in most cases.	Environmental impact -- NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our current needs in most cases.	
Justina King		RPTP-0156	Ticketing system	Is unsure why tag-offs are required for flat fares	No changes to RPTP - noting	Tag-offs provide valuable data about travel patterns to ORC. It also enables us to charge for distance based fares if we move to a zonal fare structure.	Tag-offs provide valuable data about travel patterns to ORC. It also enables us to charge for distance based fares if we move to a zonal fare structure.	
Justina King		RPTP-0156	Operations	Wi-fi never works	No changes to RPTP - operational	Thanks, we have forwarded the feedback to our operations team	Thanks, we have forwarded the feedback to our operations team	
Justina King		RPTP-0156	Fares base fare	Fares are expensive, especially cash fares if card is forgotten	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Monika Fry		RPTP-0157	Operations	Request to automate bus heating and air conditioning so drivers cannot manually control the temperature.	No changes to RPTP - operational	Thank you for your feedback. We will pass this on to our operators	Thank you for your feedback. We will pass this on to our operators	
Monika Fry		RPTP-0157	Bus stop infrastructure	Request for more Queenstown Route 2 (Arthurs Point-Arrowtown via Frankton) stops along State Highway 6, such as outside the Queenstown Events Centre and Five Mile.	No changes to RPTP - operational	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
Monika Fry		RPTP-0157	Fares base fare	Supports an increase in base fare to \$2.50 because it will not affect patronage.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Monika Fry		RPTP-0157	Fares zones	Opposes zone fares because it is too messy for tourists and bus drivers.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Angela Gardiner		RPTP-0158	Bus stop infrastructure	Suggests we improve bus stop infrastructure, particularly address the lack of seating and shelter. Submitter mentions they are disabled so seating and shelter is extremely important for them	No changes to RPTP - noting	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	
Angela Gardiner		RPTP-0158	Fares base fare	Opposes adult bee card fare increases	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Angela Gardiner		RPTP-0158	Fares zones	Supports zone fares	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Julia Wilson		RPTP-0160	Fares concessions	Considering lowering the ages for child and/or youth fares as they currently seem arbitrary.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Julia Wilson		RPTP-0160	Fares concessions	Supports free child fares and 40% discounted youth fares as long as it doesn't lead compromises in the costs of other areas.	No changes to RPTP - noting	Child and youth concession value decision and link to not compromising service provision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Julia Wilson		RPTP-0160	Fares base fare	Supports an increase in the base fare to \$2.50 if it prevents services being reduced.	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Julia Wilson		RPTP-0160	Vehicles electric	Request for more electric buses to be rolled out in Dunedin.	No changes to RPTP - noting	This is ongoing. We expect Dunedin to be served entirely by electric buses by 2028 (with possible minor exceptions such as lightly used buses on school-focused trips)	This is ongoing. We expect Dunedin to be served entirely by electric buses by 2028 (with possible minor exceptions such as lightly used buses on school-focused trips)	
Julia Wilson		RPTP-0160	Fares zones	Opposes a zone fare structure because flat fares for short trips encourages active travel (e.g. walking, cycling) and for long trips encourages less private vehicle. This supports the health and environmental benefits of public transport.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Antonius Limburg		RPTP-0161	Fares concessions	Supports standardising concessions between Dunedin and Queenstown	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Antonius Limburg		RPTP-0161	Fares concessions	Supports free child fares because it is an incentive for more public transport and fewer cars	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Antonius Limburg		RPTP-0161	Community transport	Supports ORC supporting community transport	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Antonius Limburg		RPTP-0161	Bus drivers	Submitter says most drivers are good but some could have better attitudes. Also says they hope drivers are well supported	No changes to RPTP - operational	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. To achieve this, we need to attract and hold on to great drivers.	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. To achieve this, we need to attract and hold on to great drivers.	
Antonius Limburg		RPTP-0161	Vehicles electric	Supports electric buses	No changes to RPTP	Noted with thanks	Noted with thanks	
Antonius Limburg		RPTP-0161	Reliability	Submitter thinks increasing the frequency to 15 minutes is a good goal but not essential. What is most important is reliability of service, which has been a problem in Dunedin	No changes to RPTP - noting	We accept that there is a balance between improving frequency and other consideration. Service reliability is a key priority outlined in the plan.	We accept that there is a balance between improving frequency and other consideration. Service reliability is a key priority outlined in the plan.	
Antonius Limburg		RPTP-0161	Fares base fare	Supports increasing the adult Bee card fare while acknowledging ORC has few options	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Antonius Limburg		RPTP-0161	Fares zones	Supports zone fares, particularly because most of Dunedin city is proposed as one zone	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sarah A		RPTP-0162	Fares concessions	Requests a concession for university students, especially if there is a base fare increase	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Emma Vickers		RPTP-0163	Fares concessions	Supports a youth fare discount of 40% (our proposal) or 50%.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Emma Vickers		RPTP-0163	Fares concessions	Request for lower fares for local ratepayers.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a local is also difficult. A fare system that is simple and easy is an important principle of our plan.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a local is also difficult. A fare system that is simple and easy is an important principle of our plan.	
Emma Vickers		RPTP-0163	Active transport	Request to refurbish and donate second-hand bicycles to low-income communities.	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	
Emma Vickers		RPTP-0163	Upper Clutha service	Request for a long-term bus service (not a short-term trial) connecting Wanaka, Luggate, Hawea, Hawea Flats, Tarras, Queensberry and surrounding communities. Preference for this service to include weekends.	No changes to RPTP - noting	This plan signals intent to improve regional connectivity however based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	This plan signals intent to improve regional connectivity however based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	
Emma Vickers		RPTP-0163	Fares base fare	Opposes a base fare increase to \$2.50 and requests we generate more revenue by prioritising patronage growth and increasing advertising.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Emma Vickers		RPTP-0163	Fares zones	Supports zone fares. Suggests fares be free in city centres and incrementally cost more farther away.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Peter Dowden		RPTP-0164	Fares concessions	Thinks the youth discount in DUD and QT should be 50% not 40%	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Peter Dowden		RPTP-0164	Regional services	Suggests ORC does a 'code share' to sell unused seats on Intercity	No changes to RPTP - noting	Thank you for the point. As noted in the we are working towards improving regional connectivity and integrating with InterCity services will be an important consideration. Code sharing with InterCity is something that will be something we explore further.	Thank you for the point. As noted in the we are working towards improving regional connectivity and integrating with InterCity services will be an important consideration. Code sharing with InterCity is something that will be something we explore further.	
Peter Dowden		RPTP-0164	Fares base fare	Supports adult bee card fare increases, but thinks the fare doesn't need to be a round number	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Peter Dowden		RPTP-0164	Fares zones	Supports zone fare structure but thinks the fare between the zones is very important. Doubling the fare for double the distance is too high	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Peter Dowden		RPTP-0164	General	Suggests adding COVID-19 and driver shortage recovery milestones to p14 timeline	No changes to RPTP	We acknowledge the points -- we are comfortable with keeping the timeline simpler	We acknowledge the points -- we are comfortable with keeping the timeline simpler	

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Peter Dowden		RPTP-0164	General	Suggests mentioning walking and cycling milestones on p15	No changes to RPTP	We feel this would reduce the focus of the text	We feel this would reduce the focus of the text	
Peter Dowden		RPTP-0164	Operations	Suggests publishing regular reporting on performance measures in section 7.1	No changes to RPTP - noting	We agree with what is suggested and improving our data reporting is a target. We do not see a need to say more in the plan	We agree with what is suggested and improving our data reporting is a target. We do not see a need to say more in the plan	
Peter Dowden		RPTP-0164	Pets on buses	Suggests allowing dogs on buses with approved muzzles	No changes to RPTP	Recommend existing pet policy is maintained	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Peter Dowden		RPTP-0164	Bikes on buses	Suggests surfboard racks for certain routes	No changes to RPTP	An interesting suggestion and aligns with accommodating skis etc in Queenstown, but we cannot prioritise this at present	An interesting suggestion and aligns with accommodating skis etc in Queenstown, but we cannot prioritise this at present	
Peter Dowden		RPTP-0164	Customer service	Suggests more training for security guards to have more PT knowledge	Change to RPTP	Recommend adding an action to represent this sentiment.	Recommend adding an action to represent this sentiment.	Add CS A6: Investigate developing existing security services towards an increased customer service focus [Jack: weak suggestion, keen on feedback]
Peter Dowden		RPTP-0164	Ticketing system	Requests a local-resident data flag in Motu Move data	No changes to RPTP	We do not consider this viable.	We do not consider this viable.	
Peter Dowden		RPTP-0164	Operations	Thinks that extra cruise ship services should aim for 100% cost recovery	No changes to RPTP	We agree with the concerns but do not see a need to represent this in the Plan.	We agree with the concerns but do not see a need to represent this in the Plan.	
Peter Dowden		RPTP-0164	Operations	SE A2 Requests clearer phrasing that extra services would be added to existing routes for special events	Change to RPTP	Agree with the suggestion -- could be clearer	Agree with the suggestion -- could be clearer	Add further clause to SE A1 below bullet points: "Where possible, event services should be branded and run as extra trips on the existing network; in some cases, services may run on bespoke alignments".
Peter Dowden		RPTP-0164	Operations	SE A3 emphasise bus priority measures at events	No changes to RPTP	We agree wit the outcome sought, but SE A3 sufficiently covers this and delivery of this outcome is an operational consideration	We agree wit the outcome sought, but SE A3 sufficiently covers this and delivery of this outcome is an operational consideration	
Peter Dowden		RPTP-0164	Timetables	Opposes the over-emphasis on clockface timetabling -- particularly in light of real time information making it easier on customers	No changes to RPTP	Thank you for the points. We feel that the submitter slightly over-states the irrelevance of clockface scheduling in the modern environment (memorability of timetables is still not insignificant in journey planning for less-frequent routes) , but we agree (and our policy supports) balancing the clockface principle with other timetabling considerations, such as varying running times for congestion, and departing from clockface timetables when there are major efficiencies or other service design patterns (such as combined frequency on branching services like St Kilda buses) that suggests deviations from the clockface principle.	Thank you for the points. We feel that the submitter slightly over-states the irrelevance of clockface scheduling in the modern environment (memorability of timetables is still not insignificant in journey planning for less-frequent routes) , but we agree (and our policy supports) balancing the clockface principle with other timetabling considerations, such as varying running times for congestion, and departing from clockface timetables when there are major efficiencies or other service design patterns (such as combined frequency on branching services like St Kilda buses) that suggests deviations from the clockface principle.	
Peter Dowden		RPTP-0164	Timetables	Recommends avoiding or reducing intermediate timing points where possible -- better to move spare time to end of routes	No changes to RPTP	We agree that there is a balance to be had here and excessive timing points should be avoided.	We agree that there is a balance to be had here and excessive timing points should be avoided.	
Peter Dowden		RPTP-0164	General	Recommends expansion of SQ A4 to include quality standards and accessibility standards	No changes to RPTP	Equivalent action is already in place as VQ A3 on p.32	Equivalent action is already in place as VQ A3 on p.32	
Peter Dowden		RPTP-0164	Customer service	Requests change of phrasing in SQ A4 to be "security and customer staff"	Change to RPTP	Support	Support	Replace "Security staff" with "Security and customer service staff" in SQ A4
Peter Dowden		RPTP-0164	General	Suggests that there needs to be emphasis on efficiency of special events service in SE A3	No changes to RPTP	We feel that the existing action represents this concern	We feel that the existing action represents this concern	

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Peter Dowden		RPTP-0164	General	Recommends identifying Anzac Day / dawn service as a major event as it inherently falls outside of PT timetable, even though its attendance would otherwise be below threshold	No changes to RPTP	Acknowledging its community importance, we would be concerned at the value for money of supporting dawn service without some supporting funding; so we would consider it to make more sense in the "special event" but not "major event" category	Acknowledging its community importance, we would be concerned at the value for money of supporting dawn service without some supporting funding; so we would consider it to make more sense in the "special event" but not "major event" category	
Peter Dowden		RPTP-0164	General	Recommends regular reports on RUB compliance	No changes to RPTP	We support the outcome sought, but we're not comfortable that another reporting requirement will be an effective mechanism. We would see this as part of a wider area of contract management that we seek to make improvements in.	We support the outcome sought, but we're not comfortable that another reporting requirement will be an effective mechanism. We would see this as part of a wider area of contract management that we seek to make improvements in.	
Peter Dowden		RPTP-0164	Bus stop infrastructure	Criticises territorial authorities for the fact that ground-to-bus height (not kerb-to-bus) height needs to be the standard of service for Total Mobility	No changes to RPTP	While we agree with some of the frustration at poor bus stops in places, in the context of this policy it's important to note there will always be issues such as temporary stops and stops in new, less developed locations.	While we agree with some of the frustration at poor bus stops in places, in the context of this policy it's important to note there will always be issues such as temporary stops and stops in new, less developed locations.	
Peter Dowden		RPTP-0164	Accessibility	Recommends integration of Total Mobility with bus service, particularly in the sense that TM drivers could assist boarding buses	No changes to RPTP	Such an approach may be more suited to the longer distances characteristic of community transport, rather than shorter Total Mobility trips.	Such an approach may be more suited to the longer distances characteristic of community transport, rather than shorter Total Mobility trips.	
Peter Dowden		RPTP-0164	Regional services	Suggests "code share" approach to developing regional network in a way that works with InterCity services	No changes to RPTP	Our plan includes some policies that enable a level of integration with exempt services (e.g. the potential for fare-equalisation). The submitter's suggestion is a good exemplar of how such integration occurs in other transport contexts and, while we are not in a position to commit to such an exact approach, it is a good demonstration of what is possible	Our plan includes some policies that enable a level of integration with exempt services (e.g. the potential for fare-equalisation). The submitter's suggestion is a good exemplar of how such integration occurs in other transport contexts and, while we are not in a position to commit to such an exact approach, it is a good demonstration of what is possible	
Peter Dowden		RPTP-0164	Regional services	Suggests that integration of school services could connect with the development of regional network as well	No changes to RPTP	We agree	We agree	
Peter Dowden		RPTP-0164	Routes	Dunedin network suggestions: 1) extension into new housing areas like Wakari Road, Dalziel Road; 2) Extension of Calton Hill / Corstorphine / Concord services to Green Island hub; 3) separate Abbotsford and Brighton services; 4) improved service for outer Mosgiel; 5) extension of Mosgiel services back to town via Three Mile / Halfway Bush; 6) Improve implementation of Mosgiel Express to be all-stops in central Dunedin and Mosgiel; stop sending via Caversham	No changes to RPTP	The suggestions are sound and would be considered in future network reviews. It should be noted that improved Green Island connectivity is included in the 10-30 year aspirational map for Dunedin.	The suggestions are sound and would be considered in future network reviews. It should be noted that improved Green Island connectivity is included in the 10-30 year aspirational map for Dunedin.	
Peter Dowden		RPTP-0164	Regional services	Recommends adding to NF P1 to support the principle of identifying e.g. worker buses, MoE school buses as integral services in the future	No changes to RPTP	We prefer to keep the policy short and strategic in nature. Such services could be identified as integral if they were shown to meet the requirements of the existing policy.	We prefer to keep the policy short and strategic in nature. Such services could be identified as integral if they were shown to meet the requirements of the existing policy.	

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Peter Dowden		RPTP-0164	Fares concessions	F P3Thinks that school concession should be 50% not 60% in line with many other councils and consistency with Community Connect	No changes to RPTP	See fares decision	No changes from draft Plan. The final plan will include a uniform 40% concession for 5-18 year olds in Queenstown and Dunedin	
Peter Dowden		RPTP-0164	Fares base fare	Would like to see fare rises be gradualised without sharp jumps; preferably small increase ahead of March madness where capacity issues will reduce immediate impact	No changes to RPTP	See fares decision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Peter Dowden		RPTP-0164	Fares base fare	F P2 Would support reduced off-peak fares for demand management	No changes to RPTP	See fares decision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Peter Dowden		RPTP-0164	Fares local/tourists	F P2 Supports a surcharge on non-residents (through a registration system)	No changes to RPTP	We do not view this as viable.	We do not view this as viable.	
Peter Dowden		RPTP-0164	Fares base fare	Increase cash fares to a more extreme level, ahead of elimination	No changes to RPTP	See fares decision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Peter Dowden		RPTP-0164	Fares concessions	If free fares for under-12s are maintained, it should always require a card or an accompanying adult -- for the sake of involving an interaction with an adult	No changes to RPTP - operational	We do not believe the Plan needs to address this	We do not believe the Plan needs to address this	
Peter Dowden		RPTP-0164	Fares base fare	Recommends reviews of fare structure be yearly instead of six-yearly	No changes to RPTP	Our plan proposes annual review of base fare level, and less regular review of fare structure, in line with NZTA guidance. Given the level of work and staff time in reviewing fare structure in detail, we do not think that reviewing the full structure annually is viable.	Our plan proposes annual review of base fare level, and less regular review of fare structure, in line with NZTA guidance. Given the level of work and staff time in reviewing fare structure in detail, we do not think that reviewing the full structure annually is viable.	
Peter Dowden		RPTP-0164	General	Would like RUB compliance as a KPI	No changes to RPTP	We support the outcome sought, but we're not comfortable that another reporting requirement will be an effective mechanism. We would see this as part of a wider area of contract management that we seek to make improvements in.	We support the outcome sought, but we're not comfortable that another reporting requirement will be an effective mechanism. We would see this as part of a wider area of contract management that we seek to make improvements in.	
Peter Dowden		RPTP-0164	General	Zone maps are too vague for readers to take information from	No changes to RPTP	See zones decision	See zones decision	
Peter Dowden		RPTP-0164	General	Doesn't agree with emphasis of geographic separation of contracts on the basis that passengers don't need to know who the contractor is	No changes to RPTP	We agree with the principle -- although "Units" must (by legislation) be defined geographically, the geographies can overlap and there is a somewhat reduced emphasis on geographic exclusivity in the current framework. The proposed units are focused primarily on operational considerations such as termini that are close together and supporting potential changes in through-routings that could emerge from network planning processes and support timetable efficiencies; this is the reason for their geographic coherence in many (but not all) parts of Dunedin.	We agree with the principle -- although "Units" must (by legislation) be defined geographically, the geographies can overlap and there is a somewhat reduced emphasis on geographic exclusivity in the current framework. The proposed units are focused primarily on operational considerations such as termini that are close together and supporting potential changes in through-routings that could emerge from network planning processes and support timetable efficiencies; this is the reason for their geographic coherence in many (but not all) parts of Dunedin.	

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Peter Dowden		RPTP-0164	Routes	Supports improving inner-city connections in Dunedin but thinks that it is best to do this with existing routes and adding stops. A loop service would be duplicative and expensive, but some stop spacings in inner city are long relative to the rest of the network.	No changes to RPTP	Broadly agree. DCC and ORC will continue to collaborate on improving inner city operations and getting stop spacings right.	Broadly agree. DCC and ORC will continue to collaborate on improving inner city operations and getting stop spacings right.	
Josh Kent		RPTP-0165	Upper Clutha service	Would like to include a Queenstown-Wanaka route	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Josh Kent		RPTP-0165	Fares base fare	Accepts a fare raise if needed, is grateful for affordability	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Maggie Tupu		RPTP-0166	Reliability	Request to improve punctuality on chronically late services.	No changes to RPTP - noting	Our plan includes service design principles of designing timetables to have viable running times at different times of day, which would support an evaluation of timetables that have punctuality issues.	Our plan includes service design principles of designing timetables to have viable running times at different times of day, which would support an evaluation of timetables that have punctuality issues.	
EJ Holland		RPTP-0168	Routes	Improve connection between Brighton, Green Island, South Dunedin	No changes to RPTP - noting	Enhancements to these connections are in our long-term network map for Dunedin, but are currently constrained by our available funding and co-funding.	Enhancements to these connections are in our long-term network map for Dunedin, but are currently constrained by our available funding and co-funding.	
Mary Webb		RPTP-0169	Bus drivers	Praise for the politeness of bus drivers.	No changes to RPTP - operational	Noted with thanks	Noted with thanks	
Mary Webb		RPTP-0169	Fares base fare	Supports a base fare increase to \$2.50 as long as child fares remain free.	No changes to RPTP - base fare decision	Noting link to child concession	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mary Webb		RPTP-0169	Regional services	Request for public transport in rural areas using smaller buses.	No changes to RPTP - noting	Our plan includes an increased focus on medium-distance regional services, although funding to implement new services is not currently available. With regards to bus size, while it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips. See our explainer on small buses.	Our plan includes an increased focus on medium-distance regional services, although funding to implement new services is not currently available. With regards to bus size, while it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips. See our explainer on small buses.	
Mary Webb		RPTP-0169	Routes	Request for a Dunedin central city loop bus.	No changes to RPTP - noting	Such a service has been long-requested, but a previous trial in 2008 was unsuccessful and a subsequent study showed it was not viable. Almost all trips that might be taken on a central city loop bus can be supported by existing services. This service would not be consistent with our Plan's service design principles nor legislation. We would consider that any funding offered to such a service would be better deployed in improving existing routes.	Such a service has been long-requested, but a previous trial in 2008 was unsuccessful and a subsequent study showed it was not viable. Almost all trips that might be taken on a central city loop bus can be supported by existing services. This service would not be consistent with our Plan's service design principles nor legislation. We would consider that any funding offered to such a service would be better deployed in improving existing routes.	
Mary Webb		RPTP-0169	Frequency	Request to increase Route 18's off-peak frequency to 30 minutes.	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours. Additionally the irregular Harington Point extension constrains our timetable on this route	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours. Additionally the irregular Harington Point extension constrains our timetable on this route	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Mary Webb		RPTP-0169	Fares zones	Supports zone fares as long as the zones are not too small.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Amanda Whiffen		RPTP-0170	Fares concessions	Supports retaining free child fares, and if we need to raise fares do it first to those who can pay (adults)	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Amanda Whiffen		RPTP-0170	Frequency	Wants more frequent buses to Palmerston. Particularly, at least one returning to Palmerston after 6pm during the week and one heading into town mid morning	No changes to RPTP - noting	This is consistent with our service design principles; however we are constrained on what we can commit to delivering in current funding environment.	This is consistent with our service design principles; however we are constrained on what we can commit to delivering in current funding environment.	
Amanda Whiffen		RPTP-0170	Fares base fare	Supports adult bee card fare increases, but think it should be done more incrementally	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Amanda Whiffen		RPTP-0170	Fares zones	Concerned that zone fares will increase fares for people living further away	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sonika Kumari		RPTP-0171	Fares zones	Accepts higher fares for long trips e.g. Mosgiel but thinks that the core area of Dunedin shouldn't have varying fares	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Pam Haworth		RPTP-0172	General	Request for public transport to better serve Queenstown's outlying suburbs. Suggests building a park and ride at the Frankton Bus Hub or improving PT services (greater frequency and longer service hours).	No changes to RPTP - noting	Under our Queenstown PT Business Case we will be progressively improving frequencies and service hours in Queenstown, with initial improvements in July. Park and ride was considered as part of the Queenstown Integrated Business case and not considered viable.	Under our Queenstown PT Business Case we will be progressively improving frequencies and service hours in Queenstown, with initial improvements in July. Park and ride was considered as part of the Queenstown Integrated Business case and not considered viable.	
Sue Knowles		RPTP-0173	Fares concessions	Supports standardising concessions in DUD and QET as it encourages public transport use	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sue Knowles		RPTP-0173	Fares concessions	Supports retaining free fares for children	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sue Knowles		RPTP-0173	Timetables	Submitter emphasises the importance of bus timetables being regular and on time	No changes to RPTP - noting	The importance of reliable buses, is captured in the plan. Good timetable design is a core principle of the network design chapter of the Plan. However some level of early and late running is unavoidable.	The importance of reliable buses, is captured in the plan. Good timetable design is a core principle of the network design chapter of the Plan. However some level of early and late running is unavoidable.	
Sue Knowles		RPTP-0173	Bus priority	Submitter suggests the number of vehicles should be limited in Queenstown	No changes to RPTP - noting	We are supportive of demand management approaches in Queenstown.	We are supportive of demand management approaches in Queenstown.	
Sue Knowles		RPTP-0173	Fares base fare	Opposes adult bee card fare increases as it disincentivises use	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Sue Knowles		RPTP-0173	Fares zones	Opposes zone fare structure	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
David Gillespie		RPTP-0174	General	You're doing a great job	No changes to RPTP	Noted with thanks	Noted with thanks	
David Gillespie		RPTP-0174	Fares zones	Opposes increased fares for longer trips	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sharon Parker		RPTP-0176	Upper Clutha service	Mentions that Upper Clutha (Wanaka, Hawea and Luggate) have no public transport options, meaning people have limited access to opportunities	No changes to RPTP - noting	This plan signals intent to improve regional connectivity however based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Sharon Parker		RPTP-0176	Upper Clutha service	Mentions that ORC rates increase, but they don't see any new public transport coming to Upper Clutha	No changes to RPTP - noting	This plan signals intent to improve regional connectivity however based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	This plan signals intent to improve regional connectivity however based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	
Coreen Mangaoang		RPTP-0177	Timetables	Extend services in Dunedin past midnight to meet the end of shift at hospital, which will impact central city parking	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
Elena Nikitina		RPTP-0178	Fares zones	Opposes zone fares because they will disproportionately place the cost on people who can no longer afford living near city centres.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Sally Ford		RPTP-0179	Upper Clutha service	Requests public transport in Hawea, particularly during commuter hours	No changes to RPTP - noting	This plan signals intent to improve regional connectivity however based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	This plan signals intent to improve regional connectivity however based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	
Susan Bagley		RPTP-0180	Routes	Serve Arrowtown Lifestyle Village	No changes to RPTP - noting	We are not in a position to make a decision on changing the alignment of the Frankton- Arrowtown route in this plan, but this can be considered when the route is reviewed in the future..	We are not in a position to make a decision on changing the alignment of the Frankton- Arrowtown route in this plan, but this can be considered when the route is reviewed in the future..	
Susan Bagley		RPTP-0180	Fares base fare	Proposed increase in fares sounds reasonable	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ross Lewis		RPTP-0181	Fares base fare	Opposes raising the base fare to \$2.50 and requests increasing the cost of driving private vehicles (e.g. through parking fees) to incentivise public transport use.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ross Lewis		RPTP-0181	Fares zones	Opposes zone fares because a flat fare structure is the most simple.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Amy T		RPTP-0182	Fares concessions	Supports retaining free fares for children, and could potentially expand free fares	No changes to RPTP - noting	Child discount decision, additionally noting that Pg 86 of the plan contains an explanation for why we don't support free public transport.	Child discount decision, additionally noting that Pg 86 of the plan contains an explanation for why we don't support free public transport.	
Amy T		RPTP-0182	Frequency	Wants more frequent buses to Waitati	No changes to RPTP - noting	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Amy T		RPTP-0182	Fares base fare	Does not want increase in adult bee card fares. The limited parking in CBD means that cheap bus fares are an attractive option	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Amy T		RPTP-0182	Fares zones	Opposes zone fare structure because the old zones were confusing	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ilene Lumsden		RPTP-0183	Fares concessions	Supports free fares for under 12s to make sure kids can get home no matter what	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Ilene Lumsden		RPTP-0183	Community transport	Positive feedback on supporting community transport services	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	

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Ilene Lumsden		RPTP-0183	Fares concessions	Uncertain about need to standardise concessions between Dunedin and Queenstown due to different household incomes	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Ilene Lumsden		RPTP-0183	Fares concessions	Is very satisfied with price of travel as a beneficiary paying half-price Community Connect fares. Thinks an increase to \$1.25 would be affordable.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ilene Lumsden		RPTP-0183	Fares zones	Would be happy to see flat fares remain for travel between Wakari and South Dunedin	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Hugo Crag		RPTP-0185	Fares concessions	Supports retaining free child fares, and need to do everything we can to encourage families to use the bus. Potentially a day fare for families	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Hugo Crag		RPTP-0185	Fares local/tourists	Supports increasing adult bee card fares, but not for locals, only tourists	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Hugo Crag		RPTP-0185	Safety	Oppose buses going on narrow residential streets, such as in Hanleys farm due to potential danger	No changes to RPTP - noting	Our plan sets out a range of service design principles, and operating on appropriate streets is one of them. However, these principles can sometimes conflict, and there are places where we must operate buses on less-than-ideal streets. We will continue to review services and aim to improve alignments where possible.	Our plan sets out a range of service design principles, and operating on appropriate streets is one of them. However, these principles can sometimes conflict, and there are places where we must operate buses on less-than-ideal streets. We will continue to review services and aim to improve alignments where possible.	
Hugo Crag		RPTP-0185	Fares zones	Opposes zone fares because they are afraid it could lead to more people driving	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Anne Moah		RPTP-0186	Frequency	Improve weekend frequencies in Dunedin	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
Jessica Henere		RPTP-0187	Capacity	Request to prioritise the reliability and punctuality of services that children rely on to get to and from school. Currently buses are at capacity and children get left behind as a result.	No changes to RPTP - noting	Route capacity will continue to be a consideration in our design of routes and timetables.	Route capacity will continue to be a consideration in our design of routes and timetables.	
Ryan MANSBRIDGE		RPTP-0188	Fares base fare	Suggests free fares on Sundays, as in done in Perth	No changes to RPTP - base fare decision	Noting Pg 86 of the plan contains an explanation for why we don't support free public transport. Even on a Sunday free fares is contrary NZTA fare and private share policies	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Shelley Gorman		RPTP-0189	Fares concessions	Free fares for under-12s make sense as it's expensive to travel with 3+ children	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Shelley Gorman		RPTP-0189	Fares base fare	Accepts a modest fare increase if it makes service more sustainable	No changes to RPTP - noting	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Shelley Gorman		RPTP-0189	Active transport	Requests bike route for northern residents.	No changes to RPTP - noting	The Multi-modal access section in Focus area 4 of the plan supports increasing connectivity between active modes and public transport, and we will be working further on this. We will work with our TAs on infrastructure needs, however there is currently no co-funding with active mode investment..	The Multi-modal access section in Focus area 4 of the plan supports increasing connectivity between active modes and public transport, and we will be working further on this. We will work with our TAs on infrastructure needs, however there is currently no co-funding with active mode investment..	
Shelley Gorman		RPTP-0189	Frequency	Service levels on Palmerston route aren't high enough	No changes to RPTP - noting	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Shelley Gorman		RPTP-0189	Frequency	Palmerston route doesn't work for St Hildas due to bell-times	No changes to RPTP - noting	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Shelley Gorman		RPTP-0189	Fares zones	Outlying areas have weaker services levels -- higher fares further punish these areas	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jarrold Hodson		RPTP-0190	Fares concessions	Supports free child fares and discounted (40%) youth fares to encourage public transport use for people when they are young as an environmentally conscious transport choice.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jarrold Hodson		RPTP-0190	Rail and ferries	Opposes the plan's focus areas as they do not make reference to passenger rail.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Jarrold Hodson		RPTP-0190	Rail and ferries	Request for passenger rail to have greater mention in the plan because it is a more environmentally friendly option. It should be considered as an option between Mosgiel and Dunedin.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Jarrold Hodson		RPTP-0190	Fares base fare	Opposes an base fare increase to \$2.50 because it will disincentivise mode shift to public transport.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Cliff Hamilton		RPTP-0191	School services	Submitter requests to reinstate the Sandy Mount bus service, saying it takes too long to go from Waverley to Kings High School	No changes to RPTP - noting	Our priority for the Waverley/Shiel Hill area is to attain Frequent service standards. We acknowledge that school travel is a significant part of the demand for travel in this area and our planned shift onto Macandrew Road will get routes closer to South Dunedin schools.	Our priority for the Waverley/Shiel Hill area is to attain Frequent service standards. We acknowledge that school travel is a significant part of the demand for travel in this area and our planned shift onto Macandrew Road will get routes closer to South Dunedin schools.	

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Tai Mccoll		RPTP-0192	Frequency	Requests more frequent service to Harwood on Route 18 extension	No changes to RPTP - noting	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Jordan Gamage		RPTP-0193	Frequency	Request to extend more Route 18 services to Harington Point or even to the Royal Albatross Centre.	No changes to RPTP - noting	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Jordan Gamage		RPTP-0193	Fares zones	Opposes zone fares because it will penalise people who need to travel across the city.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Helen Laverick		RPTP-0194	Timetables	Submitter and her husband would use the bus more if they could take it to get to work for 7am and 730am	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
Helen Laverick		RPTP-0194	Fares zones	Opposes zone fare structure as it could disadvantage people in poor areas	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Monica Stone		RPTP-0195	Upper Clutha service	Would like to see development of PT services in Wanaka	No changes to RPTP - noting	This plan signals intent to improve transport options in our smaller centres. However based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Andrew Henderson		RPTP-0196	Funding	Request to advocate to central government that they support the cost of public transport.	No changes to RPTP - noting	As noted in the plan, central government make a significant contribution to public transport, however the current GPS priorities are to reduce the reliance on public funding and look to increase private share of public transport operating costs.	As noted in the plan, central government make a significant contribution to public transport, however the current GPS priorities are to reduce the reliance on public funding and look to increase private share of public transport operating costs.	
Andrew Henderson		RPTP-0196	General	Request for DCC to manage public transport in Dunedin because ORC and DCC sharing responsibility is confusing to the public and seems to add cost.	No changes to RPTP - noting	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Division of responsibilities between regional and urban services would be problematic and would need to be resolved. Our plan is focused on further enhancing the collaborative and efficient working relationship that ORC has with territorial authorities.	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Division of responsibilities between regional and urban services would be problematic and would need to be resolved. Our plan is focused on further enhancing the collaborative and efficient working relationship that ORC has with territorial authorities.	

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Andrew Henderson		RPTP-0196	Fares concessions	Request for Queenstown's youth discount to remain 25% while Dunedin's remains at 40% because only Queenstown residents can afford to pay higher fares.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Andrew Henderson		RPTP-0196	Fares base fare	Opposes a base fare increase to \$2.50 in Dunedin because there are more people there that are economically deprived than in Queenstown.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Dawn Stanton		RPTP-0197	Fares concessions	Supports maintaining free child fares so it is affordable for families	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Dawn Stanton		RPTP-0197	Vehicles electric	Supports electric buses	No changes to RPTP	Noted with thanks	Noted with thanks	
Dawn Stanton		RPTP-0197	Timetables	Requests improvements to frequency and service hours	No changes to RPTP - noting	Our plan supports these goals, but our funding position limits how much improvement we can implement.	Our plan supports these goals, but our funding position limits how much improvement we can implement.	
Dawn Stanton		RPTP-0197	Supergold	Wants Gold Card users to travel free all day, not just 9-3	No changes to RPTP - noting	SuperGold is a national scheme with travel periods set by NZTA. We are not in a position to extend free travel periods for SuperGold users as this would not attract co-funding or align with our requirements to increase private share.	SuperGold is a national scheme with travel periods set by NZTA. We are not in a position to extend free travel periods for SuperGold users as this would not attract co-funding or align with our requirements to increase private share.	
Dawn Stanton		RPTP-0197	Fares base fare	Supports adult bee card fare increases, but only barely. Does not want to see the fares go up higher than \$2.50 per trip, as it would make the bus a comparable price to cars	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Dawn Stanton		RPTP-0197	Fares zones	Opposes zone fare structure as a person entering the edge of one zone could pay a higher fare to travel a short distance	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Victoria Manning		RPTP-0198	Bikes on buses	Removal of bus racks, even temporarily, adds to perceptions of unreliability	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Victoria Manning		RPTP-0198	Focus areas	Not clear what "integration with public transport design" means	No changes to RPTP - noting	For further explanation, the full plan should be read.	For further explanation, the full plan should be read.	
Victoria Manning		RPTP-0198	Collaboration with institutions	ORC should work very closely with DCC on public realm design	No changes to RPTP - noting	We agree - this is our target and we do collaborate on public realm projects	We agree - this is our target and we do collaborate on public realm projects	
Victoria Manning		RPTP-0198	Collaboration with institutions	Supports strong collaboration and collective decision-making between ORC and DCC to ensure the councils complement each other's functions and support each others strategies.	No changes to RPTP - noting	We agree, and this is highlighted in our Focus area 2 of the plan. We have a positive and constructive relationship with our territorial authorities to support and complement each other's functions and coordinate work programmemes.	We agree, and this is highlighted in our Focus area 2 of the plan. We have a positive and constructive relationship with our territorial authorities to support and complement each other's functions and coordinate work programmemes.	
Victoria Manning		RPTP-0198	Wayfinding	Real time information through the app is essential	No changes to RPTP - noting	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Victoria Manning		RPTP-0198	Bus drivers	Need to improve safety of bus drivers, especially around cyclists	No changes to RPTP - operational	We are unclear what the submitters point is here. We place a high priority on safety; our Safety policy is in section 2.2 of the Plan, with safety actions throughout the Plan. This includes collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	We are unclear what the submitters point is here. We place a high priority on safety; our Safety policy is in section 2.2 of the Plan, with safety actions throughout the Plan. This includes collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	
Victoria Manning		RPTP-0198	Focus areas	Doesn't see a definition of "transport-disadvantaged people" but thinks that the narrative around this group contradicts a wider goal of supporting public transport for everyone -- including those who live without a car by choice rather than due to affordability	No changes to RPTP - noting	We thank the submitter for the thoughtful point and agree with the sentiment that we need to ensure all needs are balanced. We do, however, have a legislative mandate to specifically consider the needs of transport-disadvantaged people and we aim to do so in a way that balances the needs of all users.	We thank the submitter for the thoughtful point and agree with the sentiment that we need to ensure all needs are balanced. We do, however, have a legislative mandate to specifically consider the needs of transport-disadvantaged people and we aim to do so in a way that balances the needs of all users.	
Victoria Manning		RPTP-0198	Fares base fare	Accepts an increase in fares but consider subsidies for those unable to afford	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Victoria Manning		RPTP-0198	Fares zones	Does not support distance-based fares -- reduces usage. Focus should be on working with DCC to restrict parking to encourage bus usage	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Pat Wala		RPTP-0199	Oamaru service	Request for an urban bus service in Oamaru. It would benefit people who cannot drive and tourists. Oamaru locals are already paying rates for public transport but there is nothing to show for it.	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
Mark Benjamin		RPTP-0201	Regional services	Would like to see regular services between towns	No changes to RPTP - noting	Our plan includes a regional network layer, with goals for developing this network	Our plan includes a regional network layer, with goals for developing this network	
Mark Benjamin		RPTP-0201	Regional services	Would like to see more focus on regional towns beyond Dunedin and Queenstown	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding	
Mark Benjamin		RPTP-0201	Fares base fare	Accepts that increases in fares can support service improvements	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mark Benjamin		RPTP-0201	Fares zones	Accepts zonal system but it needs to be clear and transparent	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Carole Stewart		RPTP-0202	Timetables	Request for greater frequency and longer service hours for buses connecting Mosgiel and Dunedin City Centre.	No changes to RPTP - noting	Our plan and the Fares and Frequencies Business case supports these goals, but our funding position limits how much improvement we can implement.	Our plan and the Fares and Frequencies Business case supports these goals, but our funding position limits how much improvement we can implement.	

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Carole Stewart		RPTP-0202	Dunedin Airport service	Request for a bus service to be introduced to Outram and the Dunedin Airport.	No changes to RPTP - noting	Our proposed Balclutha-Dunedin service would operate via the airport, but is not funded. We are not in a position to support a higher level of service. This service could be routed via Outram but this would need further consideration.	Our proposed Balclutha-Dunedin service would operate via the airport, but is not funded. We are not in a position to support a higher level of service. This service could be routed via Outram but this would need further consideration.	
Carole Stewart		RPTP-0202	Routes	Support Routes 80/81 being replaced with something different because it is not well patronised and is likely not cost effective.	No changes to RPTP	Thank you -- our On-Demand trial begins in July	Thank you -- our On-Demand trial begins in July	
Carole Stewart		RPTP-0202	Fares base fare	Supports a base fare increase to \$2.50. Believes it is still an affordable fare.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Carole Stewart		RPTP-0202	Fares zones	Does not support a zone fare structure because it would disincentivise public transport use.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Becca Ingram		RPTP-0203	Bikes on buses	Wants to reinstate the bike racks on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Nancy Higgins		RPTP-0204	Focus areas	Interprets "value for money" as excluding rural areas from access	No changes to RPTP - noting	Our plan aims to achieve value for money across the system. There will always be some routes that are less cost effective but still serve and important network function. Servicing rural areas with public transport is challenging however the plan includes working with our smaller communities to implement community transport to serve essential needs as a first step.	Our plan aims to achieve value for money across the system. There will always be some routes that are less cost effective but still serve and important network function. Servicing rural areas with public transport is challenging however the plan includes working with our smaller communities to implement community transport to serve essential needs as a first step.	
Nancy Higgins		RPTP-0204	Fares zones	Opposes distance-variable fares -- people shouldn't be punished for where they live	No changes to RPTP - zone fare decision	We agree with the point, and our plan gives importance to land-use considerations which would support focusing PT investment on areas where PT performs well and drives growth/development.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Nancy Higgins		RPTP-0204	Routes	Would like to see all trips on Palmerston service operate via Warrington	No changes to RPTP - noting	We will be reviewing the operation of this route and will be considering this as an option.	We will be reviewing the operation of this route and will be considering this as an option.	
Katherine Flanagan		RPTP-0205	Reliability	Request to prioritise reliability in our service delivery so people know they can get to their destination on time. This includes improving timetables and routes.	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Katherine Flanagan		RPTP-0205	Public information	Request to share proposed routes and bus stops with the public.	No changes to RPTP - noting	Unclear what the submitter means here. However any changes to routes and bus stops will include public engagement in line with ORCs Significance and Engagement policy	Unclear what the submitter means here. However any changes to routes and bus stops will include public engagement in line with ORCs Significance and Engagement policy	

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Katherine Flanagan		RPTP-0205	Reliability	Assuming zone fares are implemented in Queenstown, requests improving the reliability of Queenstown routes in Zone 2 (e.g. Route 2, Arthurs Point-Arrowtown). This includes improving timetables and addressing service delays.	No changes to RPTP - noting	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	
Katherine Flanagan		RPTP-0205	General	Request to give rebates to businesses that incentivise more efficient staff transport, such as carpooling.	No changes to RPTP - noting	While we support the intent to reduce single occupancy vehicles, any rebate would contravene Central government directive for PTAs to increase private share.	While we support the intent to reduce single occupancy vehicles, any rebate would contravene Central government directive for PTAs to increase private share.	
Katherine Flanagan		RPTP-0205	Fares zones	Support for zone fares.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jennifer Cattermole		RPTP-0206	Bikes on buses	Submitter wants the bike rack ban to end	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Jennifer Cattermole		RPTP-0206	Community transport	Submitter thinks community transport is best done by and for communities themselves, without ORC involvement	No changes to RPTP - noting	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information	
Jennifer Cattermole		RPTP-0206	Vehicles smaller	Submitter thinks running smaller buses with low passenger numbers will be cheaper	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Jennifer Cattermole		RPTP-0206	Fares base fare	Opposes increase in adult bee card fares. Doesn't care so much about quality and comfort, just wants to get from A to B cheaply	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jennifer Cattermole		RPTP-0206	Fares zones	Opposes zone fare structure as it would raise their fares, and they mention that people living farther from CBD are unable to pay more	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Natasha Hagen		RPTP-0207	Fares concessions	Thinks that free fares makes sense for the younger end of the 5-12 group, but once children are able to start travelling more independently they should be starting to pay fares	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Natasha Hagen		RPTP-0207	Focus areas	Doesn't like the "Build trust" focus area as it doesn't make any difference to passengers	No changes to RPTP - noting	Focus Area 2 Build trust is about engaging with our communities and investment partners to make sure public transport services meet the needs of the community and provide a high quality service and passenger experience.	Focus Area 2 Build trust is about engaging with our communities and investment partners to make sure public transport services meet the needs of the community and provide a high quality service and passenger experience.	
Natasha Hagen		RPTP-0207	Focus areas	As a regular user, feels that comfort, security, and access are being catered for	No changes to RPTP	Noted with thanks	Noted with thanks	

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Natasha Hagen		RPTP-0207	Focus areas	Does not understand why ORC would need to engage with iwi on a public transport plan	No changes to RPTP - noting	ORC work together in partnership with Mana whenua on all regional plans.	ORC work together in partnership with Mana whenua on all regional plans.	
Natasha Hagen		RPTP-0207	General	Concerned that this may be a public relations exercise, but is participating in good faith.	No changes to RPTP - noting	We are legislatively required to engage with our community in the development of our RPTP to make sure we have a clear understanding of our community's needs.	We are legislatively required to engage with our community in the development of our RPTP to make sure we have a clear understanding of our community's needs.	
Natasha Hagen		RPTP-0207	Fares base fare	Consider decreasing fares because increased patronage will have reduced revenue	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Natasha Hagen		RPTP-0207	Fares zones	Accepts that distance fares make sense for longer trips -- \$2 to Palmerston is "peanuts". Fares should be flat in core network area	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Hunter Hatfield		RPTP-0208	Bus priority	Request to improve public transport service so it is more attractive than private vehicle travel, especially to Dunedin City Centre. Dunedin will experience greater traffic congestion with growth and this can be prevented with public transport. improvements should include bus lanes in the short-term and automated rapid services in the long-term.	No changes to RPTP - noting	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	
Hunter Hatfield		RPTP-0208	Fares concessions	Support for free child fares and discounted youth fares (40%). Public transport provides children and youth with freedom - this should be promoted in our marketing activities. It also reduces private vehicle travel for children and their caregivers.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Hunter Hatfield		RPTP-0208	Focus areas	Opposes the focus areas because they do not emphasise the goal of improving public transport to make it more attractive than private vehicle travel. Request to see frequency increases and route expansion as priorities in the focus areas.	No changes to RPTP - noting	Focus Area 4 of our plan (A connected and integrated network) emphasises the importance of reliability and frequency, as well as service design to be as competitive as possible with the car. This is not always possible as we need to balance coverage as well. We will also be working with our territory authorities to improve reliability and priority for buses on the road networks.	Focus Area 4 of our plan (A connected and integrated network) emphasises the importance of reliability and frequency, as well as service design to be as competitive as possible with the car. This is not always possible as we need to balance coverage as well. We will also be working with our territory authorities to improve reliability and priority for buses on the road networks.	
Hunter Hatfield		RPTP-0208	Central Otago service	Request for a regional service from Central Otago to Dunedin.	No changes to RPTP - noting	Our plan increases the attention given to the regional-level network and in improving long-term connectivity for Central Otago. A Central Otago - Dunedin service beyond the current InterCity service is not currently within financial reach, but it is included in the 30-year regional map, and we will be aiming to support community transport services in order to provide a base level of service, although we acknowledge this will not meet all needs.	Our plan increases the attention given to the regional-level network and in improving long-term connectivity for Central Otago. A Central Otago - Dunedin service beyond the current InterCity service is not currently within financial reach, but it is included in the 30-year regional map, and we will be aiming to support community transport services in order to provide a base level of service, although we acknowledge this will not meet all needs.	

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Hunter Hatfield		RPTP-0208	Routes	Request to improve public transport service to the university. Expecting university students and staff to walk from the bus hub results in many choosing to travel by private vehicle instead. It also feels like bus services to the university are not coordinated with other services, making transfer times long. As the largest employer in Dunedin, the university should be a core centre of the bus network.	No changes to RPTP - noting	We will be reviewing timetables in this area. Our Plan gives service design considerations that support further evaluation of how timetables are coordinated across multiple routes.	We will be reviewing timetables in this area. Our Plan gives service design considerations that support further evaluation of how timetables are coordinated across multiple routes.	
Hunter Hatfield		RPTP-0208	Fares base fare	Supports a base fare increase to \$2.50, and even to \$2.75, to generate more revenue and fund service improvements.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Hunter Hatfield		RPTP-0208	Fares zones	Supports zone fares and would accept multiple zones within Dunedin.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tennille Doyle		RPTP-0209	Timetables	Submitter suggests that the Green Island to Brighton bus should wait 5-10 longer for the Kings and Queens buses to come in	No changes to RPTP - noting	While in any one location there are constraints that may limit the coordination of timetables, the point is understood. Coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	While in any one location there are constraints that may limit the coordination of timetables, the point is understood. Coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	
Murray spence		RPTP-0210	Public information	Does not understand the need for Māori headings on website	No changes to RPTP - noting	Māori is an official language of New Zealand and we aim for out public information to be as accessible as possible to everyone.	Māori is an official language of New Zealand and we aim for out public information to be as accessible as possible to everyone.	
Murray spence		RPTP-0210	Dunedin Bus Hub	Would like to see better shelter and seating at Dunedin Bus Hub, notably for route 77	No changes to RPTP - noting	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with DCC to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with DCC to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	
fiona van Waveren		RPTP-0211	Fares local/tourists	Opposes base fare increase for locals, but would like to see fares increase for tourists.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
fiona van Waveren		RPTP-0211	Frequency	Request for increased frequency for Arthurs Point buses to 30-minutes all day.	No changes to RPTP - noting	This is part of the planned Queenstown PT Business Case service improvements	This is part of the planned Queenstown PT Business Case service improvements	
Janette Smithies		RPTP-0212	Funding	Thinks public transport should be user pays, particularly because they live in Central Otago with no buses	No changes to RPTP - noting	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. There is no targeted rate where there are no buses.	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. There is no targeted rate where there are no buses.	
terri anderson		RPTP-0213	Pets on buses	Allow dogs on buses -- current policy is perceived to not be enough and behind international practice	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
terri anderson		RPTP-0213	Fares base fare	Accepts fare increases are reasonable if there are service improvements associated	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
terri anderson		RPTP-0213	Fares zones	Doesn't support distance-based fares, but would accept them if it allowed the addition of regional services (Gibbston/Wanaka)	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tessa Smith		RPTP-0214	Vehicles electric	Request for more sustainable public transport vehicles.	No changes to RPTP - noting	Our plan supports these goals. We are working to have a fully electric fleet within the next few years.	Our plan supports these goals. We are working to have a fully electric fleet within the next few years.	
Tessa Smith		RPTP-0214	Reliability	Request for more reliable and punctual services in Dunedin City.	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Tessa Smith		RPTP-0214	Rail and ferries	Request to expand public transport to regional train travel so locals can efficiently go between centres without a car. For instance, university students travelling between Dunedin and Christchurch could mode shift to trains if they were affordable and went to useful locations.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Tessa Smith		RPTP-0214	Fares base fare	Opposes a base fare increase because it would worsen patronage. Compared to other public transport in NZ, like Christchurch's Metro services, Orbus fares are already more expensive.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Katherine Milligan		RPTP-0215	Fares concessions	Supports free fares for children as families are struggling to afford basics	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Katherine Milligan		RPTP-0215	Community transport	Supports community transport and cites successes of community transport in Geraldine. Mentions that many people from Clyde moved to Alexandra due to limited public transport	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Katherine Milligan		RPTP-0215	Dunedin Bus Hub	Submitter happy that the toilets at the bus hub are clean	No changes to RPTP - operational	Noted with thanks	Noted with thanks	
Katherine Milligan		RPTP-0215	Public information	Submitter requests that taxi phone numbers or more information could be displayed at the bus hub	No changes to RPTP	Outside the scope of this plan	Outside the scope of this plan	
Katherine Milligan		RPTP-0215	Vehicles smaller	Submitter requests potentially using smaller buses and on-demand services during off-peak hours	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Katherine Milligan		RPTP-0215	Fares base fare	Supports increase in adult bee card fare, says they wouldn't mind paying \$2 as a pensioner	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Katherine Milligan		RPTP-0215	Fares zones	Supports zone fare structure as it could encourage more people to live in the CBD	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Eric Planas		RPTP-0216	Dunedin Airport service	Requests a Dunedin airport service -- it's the only city with no bus service to airport	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Eric Planas		RPTP-0216	Dunedin Airport service	Request for Dunedin Airport service.	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Liam Hicks		RPTP-0217	Focus areas	Opposes plan's focus areas because they do not align with the reality of public transports becoming less convenient and more expensive.	No changes to RPTP - noting	Affordability and convenience of public transport are of high importance to this plan, and captured in the focus areas.	Affordability and convenience of public transport are of high importance to this plan, and captured in the focus areas.	
Liam Hicks		RPTP-0217	Fares concessions	Supports youth fare concession of 40% because youth are among the most frequent bus users and are afforded freedom by discounted fares.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Liam Hicks		RPTP-0217	Regional services	Supports public transport connecting nearby centres to Dunedin and Queenstown.	No changes to RPTP	Noted with thanks	Noted with thanks	
Liam Hicks		RPTP-0217	Fares base fare	Opposes base fare increase currently. Fares should only be raised once service improvements are made.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Liam Hicks		RPTP-0217	Fares zones	Support for zone fares on the regional scale.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tara Strahan	Cancer Society	RPTP-0218	Fares concessions	Supports retaining free fares for children as they are more likely to use public transport and be independent	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Tara Strahan	Cancer Society	RPTP-0218	Community transport	Supports community transport but the details around it are important. Submitter thinks there should be a good pool of volunteer drivers who are vetted with training, someone to manage the drivers and ways to connect various volunteer driver services between towns	No changes to RPTP - noting	Community transport decision. Agreed -- these are issues we will be working on in implementation	No change from Draft Plan. The development of a Community Transport programme is supported.	
Tara Strahan	Cancer Society	RPTP-0218	Central Otago service	Supports focus areas but would like more emphasis on connecting health and social services with Queenstown and Dunstan	No changes to RPTP - noting	Our plan gives increased emphasis to the regional network, with access to health services being a key driver of this.	Our plan gives increased emphasis to the regional network, with access to health services being a key driver of this.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Tara Strahan	Cancer Society	RPTP-0218	Fares concessions	Supports standardising the youth fare, but would also like to see it be free	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	
Tara Strahan	Cancer Society	RPTP-0218	Fares base fare	Opposes raise in adult bee card fares, but think it might be okay if there is a cap on fares	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago. Fare caps are included as an option for future decisions.	
Deepak Rana		RPTP-0219	Community transport	Supports community transport from Dunedin - Clutha and QT - Alex.	No changes to RPTP - noting	We agree that community transport has a role in improving transport options in the Clutha District. Our plan also has a focus to improve these regional connections as funding permits	We agree that community transport has a role in improving transport options in the Clutha District. Our plan also has a focus to improve these regional connections as funding permits	
Deepak Rana		RPTP-0219	Vehicles smaller	Suggests looking into some smaller buses for around Dunedin.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Deepak Rana		RPTP-0219	Fares zones	Likes the idea of zoning fares, provided they are still affordable.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Deepak Rana		RPTP-0219	Fares base fare	Agrees with upping the base fare provided it is still an affordable price.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Heather Smith		RPTP-0220	Oamaru service	Request for a public transport service connecting Oamaru and Dunedin Hospital. This would serve people cannot drive themselves and do not have people to drive them.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Heather Smith		RPTP-0220	Community transport	Support for ORC having a role in supporting community transport services because it would improve transport choices for ORC ratepayers that do not live in places with fixed route bus services.	No changes to RPTP - noting	Agreed -- these are issues we will be working on in implementation	Agreed -- these are issues we will be working on in implementation	
Heather Smith		RPTP-0220	Fares concessions	Opposes free fares for children, but believes they should be discounted greater than youth fares.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Heather Smith		RPTP-0220	Oamaru service	Request for a Oamaru service that connects the north and south ends of Oamaru to the Oamaru Hospital at a 'few times per day' frequency.	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
Sierra Alef-Defoe		RPTP-0221	Focus areas	Submitter thinks 'equitable access to transport' should be a focus area of the plan	No changes to RPTP - noting	Focus area 2 of the Plan outlines our equity focused approach to delivering public transport. Access is also fundamental across the passenger experience and integrated and connected network focus areas.	Focus area 2 of the Plan outlines our equity focused approach to delivering public transport. Access is also fundamental across the passenger experience and integrated and connected network focus areas.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Sierra Alef-Defoe		RPTP-0221	Upper Clutha service	Requests public transport in Upper Clutha, particularly in and around Wanaka, due to growing population	No changes to RPTP - noting	This plan signals intent to improve transport options in our smaller centres. However based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Alison Dench		RPTP-0222	Rail and ferries	Start really looking into public transport for Whakatipu, something that can run cheap and frequently and into the night. Look into all options such as bus, ferry, gondolas or rail.	No changes to RPTP - noting	At present buses are the most cost effective way to service our community with public transport. Alternative modes will be considered in the future as land use develops to support mass rapid transit like gondola.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Alison Dench		RPTP-0222	Fares base fare	Agrees with increasing base fare to \$2.50 as long as we don't increase it again soon after.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago. Fares will be reviewed annually.	
Ilana Andrews		RPTP-0223	Oamaru service	Request for public transport to and within Oamaru, especially to improve Dunedin and Oamaru Hospital access. This would serve the ageing population who are transport disadvantaged. Suggests collaborating with existing private bus companies to provide affordable transport choices.	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
R Turner		RPTP-0224	Central Otago service	Suggests a form of commuter transport (peak times in morning and afternoon) connecting towns in central Otago.	No changes to RPTP - noting	An Alexandra-Queenstown service is included in the plan as an integral service, but is subject to funding uncertainty	An Alexandra-Queenstown service is included in the plan as an integral service, but is subject to funding uncertainty	
R Turner		RPTP-0224	Community transport	Submitter supports community transport, but is concerned it may not be a long term solution	No changes to RPTP - noting	We agree it may not be a long-term solution in some locations. It does however have a role in paving the way for further understanding the transport needs in our smaller centres and how public transport can best support those.	We agree it may not be a long-term solution in some locations. It does however have a role in paving the way for further understanding the transport needs in our smaller centres and how public transport can best support those.	
R Turner		RPTP-0224	Fares zones	Supports moving to a zone fare structure	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Rose Lee		RPTP-0225	Dunedin Airport service	We should have more buses to Dunedin and the airport.	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, but is not currently funded. A more frequent (e.g. hourly) Airport service would not be a priority as there are a significant number of other service improvements that would deliver better value for money.	
Rose Lee		RPTP-0225	Community transport	Request looking into buses and community transport for Cromwell, Dunedin, Queenstown and the airport	No changes to RPTP - noting	Agree, Cromwell will be considered within community transport. However Dunedin, Queenstown and the airport are considered as part of improving our regional network.	Agree, Cromwell will be considered within community transport. However Dunedin, Queenstown and the airport are considered as part of improving our regional network.	
Rose Lee		RPTP-0225	Central Otago service	We should have more buses from Alex, Clyde and Cromwell to Dunedin and its airport.	No changes to RPTP - noting	Our plan gives increased emphasis to the regional network, with access to key services in Dunedin being a key driver of this.	Our plan gives increased emphasis to the regional network, with access to key services in Dunedin being a key driver of this.	
Rose Lee		RPTP-0225	Fares base fare	Agrees with an increase up to \$2.50	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Rose Lee		RPTP-0225	Fares zones	Agrees with zoning fares provided they are realistic.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Heather Williams		RPTP-0226	Fares concessions	Supports free child fares and 40% discounted youth fares because it helps low-income families and supports students attending school.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Heather Williams		RPTP-0226	Pets on buses	Request for a dog bus.	No changes to RPTP - noting	Outside of scope	Outside of scope	
Heather Williams		RPTP-0226	Bus drivers	Request to compensate bus drivers more for keeping passengers safe, working long days and being important people in the community. Request for a bus driver appreciation day at least.	No changes to RPTP - operational	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	
Heather Williams		RPTP-0226	Ticketing system	Request for a Bee Card top-up machine at the bus hub that accepts bank cards.	No changes to RPTP - noting	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments. The top-up locations are yet to be determined	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments. The top-up locations are yet to be determined	
Marina Moss		RPTP-0227	Fares concessions	Recommends that we could introduce different concessions for school and tertiary students	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Marina Moss		RPTP-0227	Vehicles electric	Found the electric bus to Mosgiel to be challenging. The submitter is retired and uses a walking stick. They found the bus loud (humming sound) and had a difficult time finding a seat	No changes to RPTP - operational	Thank you for your feedback. We will pass this on to our operators	Thank you for your feedback. We will pass this on to our operators	

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Marina Moss		RPTP-0227	Fares base fare	Opposes raises to adult bee card fares, as it could disadvantage people who are already struggling	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Gordon McKay		RPTP-0228	Routes	Request to look into extending the 77 service into South Dunedin/Anderson Bay Rd, and East Taieri area, with a park and ride option.	No changes to RPTP - noting	Enhancements to these connections are in our long-term network map for Dunedin, but are currently constrained by our available funding and co-funding. A Park and Ride for Mosgiel is in the planning stages with DCC	Enhancements to these connections are in our long-term network map for Dunedin, but are currently constrained by our available funding and co-funding. A Park and Ride for Mosgiel is in the planning stages with DCC	
Gordon McKay		RPTP-0228	Vehicles electric	Agrees with most of our objectives, however is not convinced electric buses are any better due to battery disposal and lithium mining.	No changes to RPTP - noting	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	
Gordon McKay		RPTP-0228	Rail and ferries	An uplift in public transport and a decrease in private vehicles is needed, things like park and rides and train services could help with this. Especially between Dunedin and Mosgiel.	No changes to RPTP - noting	We agree with working to reduce private vehicle use and dependency, however there is not currently the evidence to support a viable rail service in the region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Gordon McKay		RPTP-0228	Wayfinding	Can we look into a simple and easy app function that plans your trip for you, times, stops, buses etc.	No changes to RPTP - noting	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	
Gordon McKay		RPTP-0228	Fares zones	Is okay with the idea of having 2-3 zones like inner city, outer suburbs (green Island, Fairfield, Abbotsford), and Mosgiel, and charging \$2, \$2.50 and \$3 for the zones	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Hannah Chamberlain		RPTP-0229	Fares concessions	Supports free child fares because it is more affordable for families. It also teaches children how to use the bus for when they will be paying passengers.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Hannah Chamberlain		RPTP-0229	Focus areas	Supports value for money as a focus area because it is the greatest factor in the submitter's decision to commute using public transport.	No changes to RPTP	Noted with thanks	Noted with thanks	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Hannah Chamberlain		RPTP-0229	Marketing, promotion, engagement	Request to promote bus use for students and young people to remove perceived barriers to use. This includes having bus ambassadors on the services and attending uni events during O-Week.	No changes to RPTP - noting	This is included in our plan in the Branding and Marketing policies and actions on pg. 26.	This is included in our plan in the Branding and Marketing policies and actions on pg. 26.	
Hannah Chamberlain		RPTP-0229	Oamaru service	Request for public transport service within Oamaru and suggests beginning with community transport or on-demand to demonstrate demand for a fixed-route service.	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
Hannah Chamberlain		RPTP-0229	Fares base fare	Opposes a base fare increase because it would disincentivise commuting with public transport for this submitter.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ian Davison		RPTP-0231	Oamaru service	Focus on connecting places like Oamaru, both internally and with Dunedin, Waimate and Timaru to reduce road usage. look into buses and trains for this.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Service provision north of Oamaru is outside the Otago Region.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Service provision north of Oamaru is outside the Otago Region.	
Ian Davison		RPTP-0231	Fares concessions	We should keep the current youth and child fares, as well as free fares for SuperGold cardholders.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Ian Davison		RPTP-0231	Rail and ferries	Public transport should be fully integrated across all of NZ with buses, ferries and trains.	No changes to RPTP - noting	We agree with the aspiration and are working to do our best in the Otago region. Buses and ferries are still the most effective mode for public transport service delivery at present.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Ian Davison		RPTP-0231	Focus areas	Main aim should be reducing impacts on the environment, including reducing road usage (private cars, rental cards and campers)	No changes to RPTP - noting	We agree, and this is highlighted in our Focus area 3, but also more broadly throughout the plan	We agree, and this is highlighted in our Focus area 3, but also more broadly throughout the plan	
Jean Park MNZM		RPTP-0232	Marketing, promotion, engagement	Request for more promotion from ORC and DCC on Dunedin as a "great place to be and visit." The south of the country needs more marketing.	No changes to RPTP - noting	This is outside the scope of the plan	This is outside the scope of the plan	
Jean Park MNZM		RPTP-0232	Rail and ferries	Request to incorporate train travel into public transport service, including trains to Middelmarsh and South of Dunedin toward Invercargill.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Linda-Jean Young		RPTP-0233	Routes	Submitter likes the 77 bus route	No changes to RPTP	Noted with thanks	Noted with thanks	

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Linda-Jean Young		RPTP-0233	Fares base fare	Submitter thinks the fare price (\$2) and structure (flat fares) are good as is and we should not raise fares or move to zones	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Alexander Crawford		RPTP-0234	Community transport	Community transport is high value for small communities. Especially if we use local ideas, shared shuttles and volunteer support. (see places like Australia)	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Alexander Crawford		RPTP-0234	Fares base fare	Having a maximum daily fare cap on this would add value	No changes to RPTP - noting	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Alexander Crawford		RPTP-0234	Collaboration with institutions	Put some thought into pedestrianising Queenstown and improving the Stanley St hub to make it more convenient.	No changes to RPTP - noting	QLDC is looking to pedestrianise areas within central Queenstown as part of the Queenstown Town Centre Masterplan. We will be working to Improve the Stanley Street hub as part of Project Manawa, led by QLDC	QLDC is looking to pedestrianise areas within central Queenstown as part of the Queenstown Town Centre Masterplan. We will be working to Improve the Stanley Street hub as part of Project Manawa, led by QLDC	
Alexander Crawford		RPTP-0234	Rail and ferries	Council should look to leverage rail infrastructure, especially for Dunedin, like low cost corridors.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Alexander Crawford		RPTP-0234	Focus areas	Believes the proposed changes will improve the experience.	No changes to RPTP	Submitter's request is unclear	Submitter's request is unclear	
Alexander Crawford		RPTP-0234	Focus areas	Value and connection are important, and so is sustainability. People will use public transport more if its high value and competitive.	No changes to RPTP - noting	We agree. Sustainability is our focus area 3 as outlined in the plan. We also note the importance of getting the value proposition for PT right.	We agree. Sustainability is our focus area 3 as outlined in the plan. We also note the importance of getting the value proposition for PT right.	
Alexander Crawford		RPTP-0234	Fares zones	Reasonable zoning fares will help keep our services more sustainable. Distanced based fares are fair and amenable, people will pay more to travel further if its still high value.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
David Wigley		RPTP-0236	Oamaru service	Submitter thinks there should be a service between Oamaru and Dunedin, though they acknowledge they would only use it a few times a year. They are happy to pay higher fares (such as the Intercity fare), but the current Intercity times are inconvenient	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Thank you for the feedback regarding timing of services.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Thank you for the feedback regarding timing of services.	

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David Wigley		RPTP-0236	Oamaru service	Interested in an Oamaru-Dunedin service that returns on the same day. They are happy to pay the Intercity fare, but the current Intercity bus is inconvenient, departing from Oamaru at 1215 and returning at 810pm	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Thank you for the feedback regarding timings and fares.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Thank you for the feedback regarding timings and fares.	
Rebekah Graham	Parents of Vision Impaired NZ	RPTP-0237	Fares concessions	Discounted and free fares for kids helps with congestion, cost and independence, especially for transport disadvantaged and disabled parents and teens.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Rebekah Graham	Parents of Vision Impaired NZ	RPTP-0237	Community transport	More clarity on whether community transport would be accessible and how it would work	No changes to RPTP - noting	Detail of Community Transport is explained on pg. 37 of the full Plan document	Detail of Community Transport is explained on pg. 37 of the full Plan document	
Rebekah Graham	Parents of Vision Impaired NZ	RPTP-0237	Accessibility	We need to better capture disabled people's experiences. 'Transport disadvantaged' is not an adequate term. More specific commitment and understanding of accessibility, the needs and the barriers they face - from access to bus and ticketing information to bus usage and overall connectivity.	No changes to RPTP - noting	Section 2.8 of the Plan (pg. 33) outlines our approach to improving accessibility for transport disadvantaged people. Additionally focus area 2 include Action EQ A2 that the Council will conduct meaningful engagement with transport disadvantaged people to understand their needs better and co-create solutions..	Section 2.8 of the Plan (pg. 33) outlines our approach to improving accessibility for transport disadvantaged people. Additionally focus area 2 include Action EQ A2 that the Council will conduct meaningful engagement with transport disadvantaged people to understand their needs better and co-create solutions..	
Michel Herde		RPTP-0238	Community transport	Supports connecting smaller towns to larger centres with ORC-supported community transport.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Michel Herde		RPTP-0238	Bus drivers	Request for increased driver training so drivers drive more gently, especially on the new electric buses. Currently some drivers accelerate and break too harshly and take corners sharply, creating discomfort for passengers	No changes to RPTP - operational	We place a high priority on safety; our Safety policy is in section 2.2 of the Plan and safety actions throughout the Plan, including collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	We place a high priority on safety; our Safety policy is in section 2.2 of the Plan and safety actions throughout the Plan, including collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	
Michel Herde		RPTP-0238	Fares base fare	Opposes fare increases and believes ratepayers should cover more of the cost of public transport.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Michel Herde		RPTP-0238	Fares zones	Supports zone fares but requests a simple system, such as a city and outlying area zone only.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Dave Broderick	Dunedin Tramways Union	RPTP-0239	Routes	The Tramways Union requests multiple changes regarding the bus service covering Mosgiel/Dunedin and Brighton/Abbotsford/Green Island. See the attachment for proposed changes. There are otherwise no comments on the RPTP itself.	No changes to RPTP	<p>Route 77: We will review the performance of the South Dunedin changes; the alternatives described are viable alternatives.</p> <p>Route 70 afternoon timetable: We note the concerns about the afternoon peak. Resources are currently limited and we cannot commit to such changes, but we accept that there is a strong case for better service here.</p> <p>Route 70 / Concord: it should be noted that the Concord extension to route 70 will not operate from July. We note the point about extending route 37 to Concord; while we have no concrete plan to do this at this point, we do acknowledge the poor connectivity at Green Island. If the submitter views the maps in the full Plan, they will see that the 30 year (speculative) map includes improved connections at Green Island; we are keen to explore these options in future network reviews in order to have a more concrete plan for connectivity in the area.</p>	<p>Route 77: We will review the performance of the South Dunedin changes; the alternatives described are viable alternatives.</p> <p>Route 70 afternoon timetable: We note the concerns about the afternoon peak. Resources are currently limited and we cannot commit to such changes, but we accept that there is a strong case for better service here.</p> <p>Route 70 / Concord: it should be noted that the Concord extension to route 70 will not operate from July. We note the point about extending route 37 to Concord; while we have no concrete plan to do this at this point, we do acknowledge the poor connectivity at Green Island. If the submitter views the maps in the full Plan, they will see that the 30 year (speculative) map includes improved connections at Green Island; we are keen to explore these options in future network reviews in order to have a more concrete plan for connectivity in the area.</p>	
haze alexandre		RPTP-0240	Focus areas	We are lacking an integrated network, this should be a key focus.	No changes to RPTP - noting	An integrated and connected network is a key focus as outlined in Focus area 4 of the Plan.	An integrated and connected network is a key focus as outlined in Focus area 4 of the Plan.	
haze alexandre		RPTP-0240	Frequency	Better and more even services for higher population suburbs and outskirts, better timing and integration.	No changes to RPTP - noting	Our plan and the Fares and Frequencies Business case supports these goals, but our funding position limits how much improvement we can implement.	Our plan and the Fares and Frequencies Business case supports these goals, but our funding position limits how much improvement we can implement.	
haze alexandre		RPTP-0240	Operations	Request for windows that open on the bus, as well as rainbow coloured buses.	No changes to RPTP - operational	This is outside the scope of the plan. Noting all vehicles must comply with Requirements for Urban buses standards	This is outside the scope of the plan. Noting all vehicles must comply with Requirements for Urban buses standards	
haze alexandre		RPTP-0240	Fares base fare	Cheaper bus fares are incentive to use the bus, suggests a base fare of \$1.00	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
haze alexandre		RPTP-0240	Fares zones	Charging more for longer trips accounts for the cost it takes to run longer.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Patricia McLean		RPTP-0241	Focus areas	Supports focus areas but requests they prioritise affordability.	No changes to RPTP - noting	Affordability and convenience of public transport are of high importance to this plan, and captured in the focus areas.	Affordability and convenience of public transport are of high importance to this plan, and captured in the focus areas.	
Patricia McLean		RPTP-0241	Routes	Request to shorten distance between the Dunedin Bus Hub and the first stop south of the hub (currently on Princes St at Dowling).	No changes to RPTP - noting	Factors that need to be considered in stop spacing and placement are included on Pg 74 of the plan. Balancing street space allocation is challenging in the central city and we work with DCC to achieve good outcomes for public transport.	Factors that need to be considered in stop spacing and placement are included on Pg 74 of the plan. Balancing street space allocation is challenging in the central city and we work with DCC to achieve good outcomes for public transport.	
Patricia McLean		RPTP-0241	General	Praise for past service improvements, which has enabled significant mode shift for trips into the Dunedin Centre City for this submitter.	No changes to RPTP	Noted with thanks	Noted with thanks	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Patricia McLean		RPTP-0241	Dunedin Bus Hub	Request to improve wayfinding and safety in the Dunedin Bus Hub. This includes improving information/signage on where to catch which bus, and improving the ease of crossing the street. Suggests building a proper bus station like Christchurch's.	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to manage antisocial behaviours and safety at the bus hub.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to manage antisocial behaviours and safety at the bus hub.	
Patricia McLean		RPTP-0241	Active transport	Request to prioritise integrated public and active transport over private vehicle travel.	No changes to RPTP - noting	The Multi-modal access section in Focus area 4 of the plan supports increasing connectivity between active modes and public transport, and we will be working further on this. We will work with our TAs on infrastructure needs, however there is currently no co-funding with active mode investment..	The Multi-modal access section in Focus area 4 of the plan supports increasing connectivity between active modes and public transport, and we will be working further on this. We will work with our TAs on infrastructure needs, however there is currently no co-funding with active mode investment..	
Patricia McLean		RPTP-0241	Collaboration with institutions	Request for greater collaboration with road controlling authorities for safer end-to-end journeys (walking to/from stops).	No changes to RPTP - noting	We have a positive and constructive relationship with our territorial authorities. All parties in these relationships are aiming to further improve integration of the pedestrian network with public transport. This is captured in our Plan, however funding for these improvements is limited under the current GPS..	We have a positive and constructive relationship with our territorial authorities. All parties in these relationships are aiming to further improve integration of the pedestrian network with public transport. This is captured in our Plan, however funding for these improvements is limited under the current GPS..	
Patricia McLean		RPTP-0241	Collaboration with institutions	Request to advocate to central government and collaborate with other local authorities to prioritise improving public transport.	No changes to RPTP - noting	We have a positive and constructive relationship with our territorial authorities. All parties in these relationships are aiming to further improve our coordination and efficiency in delivering public transport, and this intent is represented in Focus area 2 of our Plan. We will also continue to work with and advocate for prioritising public transport with central government.	We have a positive and constructive relationship with our territorial authorities. All parties in these relationships are aiming to further improve our coordination and efficiency in delivering public transport, and this intent is represented in Focus area 2 of our Plan. We will also continue to work with and advocate for prioritising public transport with central government.	
Patricia McLean		RPTP-0241	Fares concessions	Request for a university student concession so students can afford to live farther away from the university. In turn, this would free up North Dunedin housing for people working in the Central City.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	
Patricia McLean		RPTP-0241	Fares base fare	Support for base fare increase as long as it resulted in service improvements.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Patricia McLean		RPTP-0241	Fares zones	Opposes zone fares because it would disincentivise people with the longest trips to use public transport, defeating the aim of reducing greenhouse gas emissions. Supports flat fares throughout the whole region.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Roger Fleming		RPTP-0242	Funding	Submitter does not like paying targeted transport rates in Wanaka when they don't have public transport in Wanaka	No changes to RPTP - noting	The funding model for PT is established through the LTP and AP processes as well as NZTA policy	The funding model for PT is established through the LTP and AP processes as well as NZTA policy	
Cynthia Flanagan		RPTP-0244	Marketing, promotion, engagement	Request to engage with Strath Taieri Connect Charitable Trust to understand the Middlemarch community's transport needs.	No changes to RPTP - follow up action	Focus area 2 emphasises our intent to engage with out communities to understand their needs better and co-create solutions. We thank you for your suggestion and will engage in the future.	Focus area 2 emphasises our intent to engage with out communities to understand their needs better and co-create solutions. We thank you for your suggestion and will engage in the future.	

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Cynthia Flanagan		RPTP-0244	Regional services	Request for public transport connecting Dunedin and Middlesmarch. This would particularly benefit youth and other transport disadvantaged groups.	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding	
Dianne Rogers	Access Matters Aotearoa	RPTP-0245	Community transport	Support community transport in principle, but they need to be accessible. Submitter makes recommendations about national standards for accessibility and draws on international best practice from Australia and Canada	No changes to RPTP - noting	Accessibility is a key consideration across all our service provision, and community transport will be no exception. ORC may be able to assist community vehicle trusts to access funding for installing hoists in community vehicles to improve access.	Accessibility is a key consideration across all our service provision, and community transport will be no exception. ORC may be able to assist community vehicle trusts to access funding for installing hoists in community vehicles to improve access.	
Dianne Rogers	Access Matters Aotearoa	RPTP-0245	Fares concessions	Supports retaining free child fares as it supports families, reduces congestion and enables young people to use public transport independently	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Dianne Rogers	Access Matters Aotearoa	RPTP-0245	Accessibility	Submitter wants ORC to co-develop an Accessibility Action Plan for public transport in Otago with the disability community	No changes to RPTP - noting	This is outside the scope of the RPTP, but thank you for the suggestion, and it is something for further consideration.	This is outside the scope of the RPTP, but thank you for the suggestion, and it is something for further consideration.	
Dianne Rogers	Access Matters Aotearoa	RPTP-0245	Accessibility	Does not think the plan adequately addresses accessibility, particularly for disabled people	No changes to RPTP - noting	Unsure of the specifics of this request. Delivering an accessible public transport system is a foundational aim of the Plan. It is captured in policies such as the way we deliver public information, bus standards, integration of the network with walking and cycling networks and infrastructure and Total Mobility services.	Unsure of the specifics of this request. Delivering an accessible public transport system is a foundational aim of the Plan. It is captured in policies such as the way we deliver public information, bus standards, integration of the network with walking and cycling networks and infrastructure and Total Mobility services.	
Struan Robertson Struan Robertson		RPTP-0246	Funding	Opposes focus areas because implementing a user pays funding structure should be a priority.	No changes to RPTP - noting	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	
Paola Santacruz		RPTP-0247	Frequency	Request to improve weekend services in Fairfield.	No changes to RPTP - noting	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	
Paola Santacruz		RPTP-0247	Fares zones	Opposes zone fares as a Fairfield resident who would be outside the proposed Zone 1.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
linda mcquinn		RPTP-0248	Funding	Submitter does not like paying targeted transport rates when they don't get public transport in Oamaru	No changes to RPTP - noting	A targeted rate was applied to Oamaru as an on-demand service was placed in our Regional Land Transport Plan. This service did not receive government funding so those funds collected will be used to investigate an Oamaru to Dunedin service. There is no further rating for Oamaru.	A targeted rate was applied to Oamaru as an on-demand service was placed in our Regional Land Transport Plan. This service did not receive government funding so those funds collected will be used to investigate an Oamaru to Dunedin service. There is no further rating for Oamaru.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Stephanie Trickey		RPTP-0249	Fares concessions	Opposes youth fares being discounted 40% because all children up to age 18 should be free. This would improve school attendance and break down barriers to youth using public transport.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Stephanie Trickey		RPTP-0249	Marketing, promotion, engagement	Request for more information on how we are engaging iwi and communities on public transport.	No changes to RPTP - noting	Improving engagement is a key focus of this Plan as outlined in our Focus area 2. Further information on 'how' is included in the ORC Engagement and Significance policy	Improving engagement is a key focus of this Plan as outlined in our Focus area 2. Further information on 'how' is included in the ORC Engagement and Significance policy	
Stephanie Trickey		RPTP-0249	Dunedin Bus Hub	Request to work with school administrations and the police to keep the Dunedin Bus Hub safe, and smoke/vape free.	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to manage antisocial behaviours and safety at the bus hub.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to manage antisocial behaviours and safety at the bus hub.	
Stephanie Trickey		RPTP-0249	Fares base fare	Opposes a base fare increase because fares are already more expensive than driving (i.e. petrol and parking combined). Submitter used the buses much more when fares were free.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Stephanie Trickey		RPTP-0249	Fares zones	Opposes zone fares because it will create more barriers too public transport use for people who have moved away from the city for more affordable housing.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Danielle Cooper		RPTP-0250	Bikes on buses	Request to reinstate bikes on buses.	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Danielle Cooper		RPTP-0250	Focus areas	Opposes focus areas because they believe too much focus is placed on supporting tourists' transport, rather than locals'.	No changes to RPTP - noting	Our plan emphasises delivering a convenient and reliable public transport system that improves personal freedom and access to opportunities. Public transport is for the public and we do not cater to any one user or trip type.	Our plan emphasises delivering a convenient and reliable public transport system that improves personal freedom and access to opportunities. Public transport is for the public and we do not cater to any one user or trip type.	
Rachael Nicoll		RPTP-0251	Bikes on buses	Request for the importance of bike capacity on Dunedin buses as a priority.	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Rachael Nicoll		RPTP-0251	Community transport	Supports community transport as a stepping stone for scheduled PT in areas such as Central Otago.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Rachael Nicoll		RPTP-0251	Upper Clutha service	Request for Queenstown-Wanaka service.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Rachael Nicoll		RPTP-0251	Fares base fare	Support for increasing base fare to \$2.50, but would like advertisement and other revenue sources to be increased to keep PT as affordable as possible.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Andrea Craig		RPTP-0252	Clutha service	Request for a daily Balclutha-Dunedin service because Clutha ratepayers pay transport rates and many people would use the service regularly.	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	
Adrien Auvray Matyn		RPTP-0253	Dunedin Airport service	Request for a bus service from Dunedin to the Dunedin Airport.	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Adrien Auvray Matyn		RPTP-0253	Bus priority	Request for bus lanes in Dunedin.	No changes to RPTP - noting	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	
Adrien Auvray Matyn		RPTP-0253	Fares concessions	Supports free child fares to reduce school pick-up and drop-off related traffic congestion.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Adrien Auvray Matyn		RPTP-0253	Timetables	Request for faster timetables in Dunedin, including shortening the waiting time at the hub.	No changes to RPTP - noting	The importance of coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	The importance of coordinating multiple timetables with each other is included as a consideration in the design of timetables in the Plan.	
Adrien Auvray Matyn		RPTP-0253	Fares base fare	Opposes increasing base fares because it will discourage bus use.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Adrien Auvray Matyn		RPTP-0253	Fares zones	Opposes zone fares because it does not provide equal opportunity for those who live further away.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Christine Johnston		RPTP-0254	Fares concessions	Supports free child fares to keep PT affordable for families.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Christine Johnston		RPTP-0254	Fares concessions	Supports 40% discounted youth fares, but ideally would like them to be a \$1 flat fare or even free.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	
Christine Johnston		RPTP-0254	Fares base fare	Support for increasing base fare but would like us to reduce costs by running fewer empty buses, such as by running smaller buses at off-peak times.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Christine Johnston		RPTP-0254	Fares zones	Supports zone fares because they believe it is more fair.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Lota Arellano		RPTP-0255	Operations	Request to implement fare enforcement officers on buses so ensure all passengers have paid. Fare evaders who are caught should be fined. This would encourage discipline and accountability among commuters.	No changes to RPTP - operational	The tag-on/tag-off system helps keep fare evasion low. The staff cost of having enforcement officers on buses would outweigh any lost revenue or enforcement revenue.	The tag-on/tag-off system helps keep fare evasion low. The staff cost of having enforcement officers on buses would outweigh any lost revenue or enforcement revenue.	

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Anita Jansen		RPTP-0256	Fares concessions	Opposes partially discounted youth fares -- thinks ages 0-18 should be free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Anita Jansen		RPTP-0256	Community transport	Supports ORC supporting community transport, especially connecting Cromwell/Alexandra and surrounding communities (e.g. Pisa Moorings) to Queenstown.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Anita Jansen		RPTP-0256	Community transport	Supports ORC supporting community transport, especially connecting Wanaka to Queenstown.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Anita Jansen		RPTP-0256	Focus areas	Opposes focus areas because they do not prioritise increasing public transport services or improving reliability.	No changes to RPTP - noting	Reliability is of high importance, and captured in our design principles in focus area 4 of the plan. The plan also emphasises achieving greater frequencies over time, however this is not possible due to current funding constraints.	Reliability is of high importance, and captured in our design principles in focus area 4 of the plan. The plan also emphasises achieving greater frequencies over time, however this is not possible due to current funding constraints.	
Paul Southworth		RPTP-0257	Bikes on buses	Request for all buses to have capacity for bikes and prams.	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Paul Southworth		RPTP-0257	Fares concessions	Supports a 40% discount for youth, but would prefer they ride for free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Paul Southworth		RPTP-0257	General	Request to consider whether urban buses should be managed by territorial authorities and smaller towns' PT be run by ORC.	No changes to RPTP - noting	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Division of responsibilities between regional and urban services would be problematic and would need to be resolved. Our plan is focused on further enhancing the collaborative and efficient working relationship that ORC has with territorial authorities.	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Division of responsibilities between regional and urban services would be problematic and would need to be resolved. Our plan is focused on further enhancing the collaborative and efficient working relationship that ORC has with territorial authorities.	
Paul Southworth		RPTP-0257	Fares base fare	Opposes increasing base fare because fares should be minimal or free. Opposes public transport being run like a business.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Paul Southworth		RPTP-0257	Fares zones	Opposes zone fares because they would make PT less accessible and decrease patronage.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
pam mckinlay		RPTP-0258	Bikes on buses	Request to continue prioritising accommodating bikes and micro-mobility on buses (e.g. scooters).	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
pam mckinlay		RPTP-0258	Fares concessions	Support for free child fares because it encourages school attendance and improves safe transport choices for children/families.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
pam mckinlay		RPTP-0258	Community transport	Supports ORC supporting community transport. Thinks the MyRide on-demand model in Timaru would be a good approach.	No changes to RPTP - noting	Community transport decision. An On-demand service will commence in Mosgiel in July. However On-demand is not planned for any other centres at this time due to its significant cost.	No change from Draft Plan. The development of a Community Transport programme is supported.	
pam mckinlay		RPTP-0258	Vehicles electric	Praise for electric buses.	No changes to RPTP	Noted with thanks	Noted with thanks	
pam mckinlay		RPTP-0258	Bus stop infrastructure	Request for more stops in the Queenstown CBD to have shelters so users are out of the weather when waiting.	No changes to RPTP - noting	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	
pam mckinlay		RPTP-0258	Supergold	Support for Supergold Card concession so seniors have independent transport choices, e.g. accessing appointments when there is no private vehicle option.	No changes to RPTP - noting	Supergold concessions	Supergold concessions	
pam mckinlay		RPTP-0258	Collaboration with institutions	Request for DCC to ban SUVs in car parks because they take up too much space when stationary and on the road.	No changes to RPTP	This is outside the scope of the plan	This is outside the scope of the plan	
pam mckinlay		RPTP-0258	Fares base fare	Opposes a base fare increase because central government should be responsible for funding increasing public transport costs, not users. The central government is spending on transport in the form of road improvements, which will result in poor health, safety, wealth and environment outcomes. It is also increasing inequity.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
pam mckinlay		RPTP-0258	Fares zones	Opposes zone fares because it will encourage people to drive into the CBD. This will increase parking demand and traffic congestion.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Olivia Pointon		RPTP-0259	Ticketing system	Request to enable debit/credit card payments on the bus.	No changes to RPTP - noting	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	
Olivia Pointon		RPTP-0259	Frequency	Request for increased frequency for Queenstown Route 4 and 5 (Lake Hayes Estate and Jacks Point).	No changes to RPTP - noting	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	
Olivia Pointon		RPTP-0259	Fares base fare	Opposes a base fare increase and believes zone fares should be implemented instead.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
John Robertson		RPTP-0260	Pets on buses	Request for dogs that do not fit in a carrier to be permitted on PT with a lead and cage type muzzle, as Auckland Transport permits. The submitter cites that roughly 38% of Dunedin households have a dog, and the three most popular dog breeds in NZ weigh more than 25kg. This makes bringing many dogs on the bus in a carrier unfeasible. For dog owners who cannot drive, using the bus with their dog enables greater access to open space and off-leash dog areas.	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
John Robertson		RPTP-0260	Fares zones	Supports zone fares as long as cost and patronage are adequately studied beforehand. Requests longer trip fares be on a sliding scale and not the same price per zone.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Eleanor Riley		RPTP-0261	Frequency	Request for increased Dunedin Route 1 service (Waikouaiti Coast), such as more regular service throughout the day and a late Friday and Saturday services. This would increase patronage and enable these communities to enjoy the benefits of the city without driving.	No changes to RPTP - noting	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Eleanor Riley		RPTP-0261	Fares base fare	Support for base fare increase pending it comes with service improvements.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Murray Keast	Clutha District Council	RPTP-0262	Clutha service	Request for regional services Clutha to Dunedin. There are a high number of commuters travelling between Dunedin, Milton, Balclutha and Gore. Currently Clutha District Council supports its staff by providing a commuter van travelling from Dunedin to Balclutha via Milton. Other CDC staff living in Southland carpool	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	
Murray Keast	Clutha District Council	RPTP-0262	Ticketing system	Request to enable debit/credit card payments on the bus.	No changes to RPTP - noting	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	
Murray Keast	Clutha District Council	RPTP-0262	Ticketing system	Request for a ticketing system to include the card to be available on a mobile app.	No changes to RPTP - noting	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Murray Keast	Clutha District Council	RPTP-0262	Regional services	Request that regional transport be prioritised to enable people to access employment, health, education and consumer services across territorial authority boundaries.	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	
Murray Keast	Clutha District Council	RPTP-0262	Fares base fare	Request to consider free fares in highly populated areas.	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Murray Keast	Clutha District Council	RPTP-0262	Ticketing system	Request for smart-card top-up machines at bus stops.	No changes to RPTP - noting	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments. The top-up locations are yet to be determined	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments. The top-up locations are yet to be determined	
Murray Keast	Clutha District Council	RPTP-0262	Collaboration with institutions	Request to work with Clutha District Council in the promotion of community transport services in Balclutha.	No changes to RPTP - noting	We work closely now with all our Territory Authorities. Developing community transport services will be no exception. This intent is outlined in Focus Area 2 of the plan.	We work closely now with all our Territory Authorities. Developing community transport services will be no exception. This intent is outlined in Focus Area 2 of the plan.	
Murray Keast	Clutha District Council	RPTP-0262	Fares zones	Supports zone fares, but believes longer trips should be proportionately cheaper due to economies of scale.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Murray Keast	Clutha District Council	RPTP-0262	Fares base fare	Opposes a base fare increase but understands fares are subject to demand/cost assessment for each service.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ryan King		RPTP-0263	Community transport	Opposes ORC supporting community transport because it would cost too much and take funding away from PT areas of need like Queenstown. Note: potentially this submitter understands community transport to be fixed-route or on-demand Council-run services, which it is not.	No changes to RPTP - noting	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information. We will not be diverting funding from existing services or planned service improvements in Queenstown to fund it.	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information. We will not be diverting funding from existing services or planned service improvements in Queenstown to fund it.	
Ryan King		RPTP-0263	Frequency	Request for service improvements in Queenstown to address capacity and frequency needs. Improving services is required for fewer tourists to rent cars, which would address traffic congestion. Believes that offline options like Whoosh gondolas may be the only solution to Queenstown traffic.	No changes to RPTP - noting	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan. Offline solutions are also being considered, but we must make sure these are well integrated with the bus network and land use.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan. Offline solutions are also being considered, but we must make sure these are well integrated with the bus network and land use.	
Ryan King		RPTP-0263	Focus areas	Opposes the focus areas because they do not adequately address the public transport issues in Queenstown.	No changes to RPTP - noting	The Queenstown Public Transport Business Case programme, is a suite of interventions to work towards improved public transport in Queenstown. The first improvements will be beginning in July. We agree there are a lot of challenges with delivering public transport in Queenstown, and our intent is to progress with these over time and as funding permits.	The Queenstown Public Transport Business Case programme, is a suite of interventions to work towards improved public transport in Queenstown. The first improvements will be beginning in July. We agree there are a lot of challenges with delivering public transport in Queenstown, and our intent is to progress with these over time and as funding permits.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Ryan King		RPTP-0263	Fares base fare	Supports a base fare increase to cover increasing service costs so rates do not have to further increase. Believes that the community is unlikely to be able to absorb more rates increases.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Paulette Quartermaine		RPTP-0264	General	Councils should continuously be looking at improving transport for the community.	No changes to RPTP - noting	We agree, and we believe we have articulated this in the Plan.	We agree, and we believe we have articulated this in the Plan.	
Paulette Quartermaine		RPTP-0264	Ticketing system	Not happy about what will happen to bee card funds when Motu Move takes over and thinks we should be doing refunds or transfers. Also wanting more information provided about this process.	No changes to RPTP - operational	We are waiting for confirmation, however at this stage it is anticipated that Bee card funds will be refunded not transferred. We will provide more information to the public about the process as soon as we can.	We are waiting for confirmation, however at this stage it is anticipated that Bee card funds will be refunded not transferred. We will provide more information to the public about the process as soon as we can.	
Paulette Quartermaine		RPTP-0264	Ticketing system	Does not believe reasonable for council to increase base fares when we are planning on taking all the money left on bee cards when swapping over to Motu Move	No changes to RPTP - operational	When we transfer to the National ticketing system Motu Move, all money on Bee cards will be refunded and not kept by Council. Further information on the process will be shared as soon as we have it.	When we transfer to the National ticketing system Motu Move, all money on Bee cards will be refunded and not kept by Council. Further information on the process will be shared as soon as we have it.	
Paulette Quartermaine		RPTP-0264	Fares zones	Charging more for longer trips works in other places (UK)	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Janice Rimell		RPTP-0265	Oamaru service	Opposes focus areas because they do not prioritise bringing public transport to Oamaru.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Janice Rimell		RPTP-0265	Oamaru service	Request for public bus service in Oamaru and more widely in North Otago. There is a large population there - it feels discriminatory.	No changes to RPTP - noting	An Oamaru service is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service. Servicing wider north Otago will be considered in community transport.	An Oamaru service is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service. Servicing wider north Otago will be considered in community transport.	Add a local Oamaru service to the integral services in the plan
Janice Rimell		RPTP-0265	Fares base fare	Opposes a base fare increase because everyone should be able to afford to use PT frequently.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Janice Rimell		RPTP-0265	Fares zones	Opposes zone fares because people should not be penalised for taking longer trips. For North Otago, ratepayers have already been paying for public transport without any services, so it would not be fair to charge more for future services there.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Lee Brehaut		RPTP-0266	Fares concessions	Support for free child fares but is concerned over enforcing the age limit so it is not abused.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Lee Brehaut		RPTP-0266	Community transport	Support for ORC supporting community transport services, especially for volunteer organisations providing transport from Oamaru to the Dunedin Hospital.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Lee Brehaut		RPTP-0266	Accessibility	Praise for the Total Mobility programme's positive impact on the disabled and elderly's quality of life.	No changes to RPTP	Noted with thanks	Noted with thanks	
Lee Brehaut		RPTP-0266	Safety	Request to consider the safety of bus drivers and passengers.	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of our drivers and passengers	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of our drivers and passengers	
Lee Brehaut		RPTP-0266	Public information	Request for greater public information on transport and parking for the Dunedin Hospital.	No changes to RPTP - noting	This is outside the scope of the plan	This is outside the scope of the plan	
Lee Brehaut		RPTP-0266	Collaboration with institutions	Would like to see the Dunedin Hospital coordinate appointment times with transport options, especially for those living outside Dunedin.	No changes to RPTP - noting	This is outside the scope of the RPTP. We will be working to improve our collaboration with the hospital and access to hospital services.	This is outside the scope of the RPTP. We will be working to improve our collaboration with the hospital and access to hospital services.	
Lee Brehaut		RPTP-0266	Fares concessions	Requests unemployed or sickness benefit recipients do not get concessions, because their public transport should be subsidised by a third party.	No changes to RPTP - base fare decision		The Community Connect concession is Crown- funded from outside usual funding mechanisms and is therefore consistent with the submitter's request.	
Glenis Frew		RPTP-0267	Funding	Make the fares user pays, rather than charging transport rates in areas that don't have transport (central etc)	No changes to RPTP - noting	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. There is no targeted rate where there are no buses.	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. There is no targeted rate where there are no buses.	
Pip Hawker		RPTP-0268	Regional services	Request for service connecting Outram to Dunedin.	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Pip Hawker		RPTP-0268	Fares base fare	Opposes a base fare increase because they already pay enough in rates.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Pip Hawker		RPTP-0268	Fares zones	Opposes zone fares because they already pay enough in rates.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Yin-An Chang		RPTP-0269	Frequency	Praise for the frequency improvements planned for Jacks Point services (Route 4). The current frequency makes commuting with PT unfeasible.	No changes to RPTP	Noted with thanks	Noted with thanks	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Yin-An Chang		RPTP-0269	Ticketing system	Request to implement debit/credit card payment on buses earlier than proposed because it will increase revenue.	No changes to RPTP - noting	The timing of our move to the National Ticketing System (Motu Move) is outside of our control. Roll out locations across the countries are being set as part of a national programme..	The timing of our move to the National Ticketing System (Motu Move) is outside of our control. Roll out locations across the countries are being set as part of a national programme..	
Yin-An Chang		RPTP-0269	Regional services	Request for multiple trips per day connecting Queenstown to Kingston	No changes to RPTP - noting	There are no plans to extend Queenstown services south of Homestead Bay at this stage.	There are no plans to extend Queenstown services south of Homestead Bay at this stage.	
Yin-An Chang		RPTP-0269	Fares base fare	Supports a base fare increase greater than to \$2.50 if that meant we would implement a monthly pass so locals (youth and adults) can pay less per trip.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Yin-An Chang		RPTP-0269	Fares zones	Opposes zone fares if bus users in Arrowtown or Jacks Point have to pay more.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jane Eves		RPTP-0270	Fares concessions	Free and discounted child/youth fares help get kids to school and accessibility for families that can afford or have no other options.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jane Eves		RPTP-0270	Funding	make it more of a user pays system, rather than rate payers.	No changes to RPTP - noting	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	
Jane Eves		RPTP-0270	Funding	Everyone paying rates should have transport options.	No changes to RPTP - noting	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. There is no targeted rate where there are no buses.	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. There is no targeted rate where there are no buses.	
Jane Eves		RPTP-0270	Focus areas	Value for money is really important, as long as using the bus is cheaper than driving. Agrees with integrated and connected being priorities.	No changes to RPTP - noting	Thank you, we agree and this is outlined in the Value for Money focus area of the plan. The comparable cost of driving and parking is considered during setting of fares.	Thank you, we agree and this is outlined in the Value for Money focus area of the plan. The comparable cost of driving and parking is considered during setting of fares.	
Jane Eves		RPTP-0270	Fares base fare	Increase the bus fare so its user pays, and keep kids free until 16.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jane Eves		RPTP-0270	Fares zones	Agrees with charging more for longer trips as this will still be cheaper than driving, as long as its user pays.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jason Keane		RPTP-0272	Fares concessions	Opposes free child fares -- thinks ages 5-12 should pay \$1.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Jason Keane		RPTP-0272	Community transport	Opposes ORC providing support for community transport because these services because central government should be paying for them.	No changes to RPTP - noting	Community transport decision. Noting the current GPS does not support funding of additional PT services.	No change from Draft Plan. The development of a Community Transport programme is supported.	
Jason Keane		RPTP-0272	Reliability	Request to enforce trip timeliness by penalising bus operators. This includes introducing a means of easily reporting missed, late or early services to ORC.	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Jason Keane		RPTP-0272	Reliability	Request for buses to not run early, especially for low-frequency services.	No changes to RPTP - noting	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	
Jason Keane		RPTP-0272	Wayfinding	Request to improve real-time tracking's reliability.	No changes to RPTP - operational	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	
Jason Keane		RPTP-0272	Ticketing system	Request for more Bee Card top-up locations in Dunedin. Sees drivers carrying cash as a safety issue.	No changes to RPTP - noting	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments. The top-up locations are yet to be determined	We will be rolling out the "Motu Move" national ticketing system, likely in 2026, which will allow bank-card payments. The top-up locations are yet to be determined	
Jason Keane		RPTP-0272	Fares concessions	Opposes a 40% youth concession. Would like all high school and university students to have a 50% concession, and everyone else in the youth age bracket to pay \$2.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jason Keane		RPTP-0272	Fares base fare	Support for increasing the base fare during peak times, but not off-peak, so people are incentivised to take trips when the buses run empty.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jason Keane		RPTP-0272	Fares base fare	Opposes fare increases for lower socioeconomic areas such as South Dunedin.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jason Keane		RPTP-0272	Fares zones	Supports zone fares because it is not fair to subsidise the trips of people who choose to live outside the city, such as in Palmerston.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Melinda Tweedie		RPTP-0273	Vehicles electric	More electric buses would be great	No changes to RPTP - noting	Thank you for your feedback. This will be considered in future planning.	Thank you for your feedback. This will be considered in future planning.	
Heather Duncley		RPTP-0275	Fares concessions	Supports free fares for children so they build life-long bus riding habits and so school drop-off and pick-up time traffic congestion improves.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Heather Duncley		RPTP-0275	Supergold	Request for Supergold cardholders to have free fares after 9am. They should be free after 3pm because many buses are not yet full at that time.	No changes to RPTP - noting	SuperGold is a national scheme with travel periods set by NZTA. We are not in a position to extend free travel periods for SuperGold users as this would not attract co-funding or align with our requirements to increase private share.	SuperGold is a national scheme with travel periods set by NZTA. We are not in a position to extend free travel periods for SuperGold users as this would not attract co-funding or align with our requirements to increase private share.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Heather Dunckley		RPTP-0275	Fares base fare	Opposes a base fare increase because it will disincentivise patronage growth.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sue Novell		RPTP-0276	Bikes on buses	Work on integrating bikes on buses again	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Sue Novell		RPTP-0276	Focus areas	Agrees with our 5 focus areas	No changes to RPTP	Noted with thanks	Noted with thanks	
Sue Novell		RPTP-0276	Timetables	Work on timetabling so the buses are more spread out and easier to connect.	No changes to RPTP - noting	Our plan includes updated service design principles that will support improvements to timetables.	Our plan includes updated service design principles that will support improvements to timetables.	
Sue Novell		RPTP-0276	Upper Clutha service	We should invest in public transport more widely, including scheduled times between large cities (QT - Wanaka)	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Sue Novell		RPTP-0276	Fares base fare	Increasing base fares 25% would deter people from using public transport.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sue Novell		RPTP-0276	Fares zones	Higher fares for longer trips is fair and helps with emissions and expenses	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Emilie Vandapuye		RPTP-0278	Fares concessions	Supports free child fares and requests 'child' extends to age 16.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Emilie Vandapuye		RPTP-0278	Fares base fare	Request to implement a weekly/monthly pass to improve value for money for regular users.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Emilie Vandapuye		RPTP-0278	Fares zones	Opposes zone fares because they penalise people for living farther away.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
karen rodger		RPTP-0279	Fares base fare	Although an increase is justified, some people already struggle to afford the bus.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Renee Pearson		RPTP-0280	Community transport	Supports ORC supporting community transport. Suggests a twice-per-week large shuttle so people, such as seniors, can access essential services like shopping and medical appointments. This service should be in smaller towns throughout the region and Dunedin's hill suburbs. It should be bookable by phone for accessibility.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Renee Pearson		RPTP-0280	Vehicles smaller	Request to run smaller buses more frequently.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Renee Pearson		RPTP-0280	Fares base fare	Oppose a base fare increase because 10-trips per week is already more expensive than petrol for the submitter.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Karen Hughes		RPTP-0281	Frequency	Wants more services to Mosgiel	No changes to RPTP	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	
Karen Hughes		RPTP-0281	Vehicles smaller	Submitter thinks smaller buses would be better	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Karen Hughes		RPTP-0281	Fares base fare	Wants to keep fares low so more people use the bus	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Judy Martin		RPTP-0282	Community transport	Very much supports community transport, as this gives options to those who live far away or cannot afford taxis/Ubbers.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Judy Martin		RPTP-0282	General	Supports inventing in transport that environmentally friendly and sustainable.	No changes to RPTP	Noted with thanks, and this aligns with our Plan	Noted with thanks, and this aligns with our Plan	
Judy Martin		RPTP-0282	Fares base fare	We should prioritize keeping fares competitive with fuel costs, to encourage people to use public transport.	No changes to RPTP - base fare decision	Noting link to cost to fuel price	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Judy Martin		RPTP-0282	Regional services	Focus on providing transport options for all of Otago, to lessen pollution and private car use.	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	
Judy Martin		RPTP-0282	Fares base fare	Supports a minor increase in the base adult fares. Hopes for more government subsidies.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Judy Martin		RPTP-0282	Fares zones	Does not support charging more for long trips, due to the old zones being too expensive and disincentivising people from using it.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Nereida Gomez		RPTP-0284	Fares base fare	Wants to maintain low fares so public transport will be people's preferred option for travel. Raising fares may push people to driving, raise emissions, etc.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sacha Rawstorn		RPTP-0285	Safety	Focus more of safety at bus stops, preventing bullying	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of our drivers and passengers	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of our drivers and passengers	
Ruby Anngow		RPTP-0286	Capacity	Request to add capacity to the Mosgiel services (Route 77/78).	No changes to RPTP - noting	Route capacity will continue to be a consideration in our design of routes and timetables.	Route capacity will continue to be a consideration in our design of routes and timetables.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Ruby Anngow		RPTP-0286	Public information	Request for public information improvements around leaving the accessible seating on bus for people who need it. The submitter has a hidden disability and often cannot get a seat near the front of the bus.	No changes to RPTP - noting	Thank you for your feedback. Focus area 1: Passenger experience includes increased emphasis on promotion, publicity and education activities. Policy BM P2 pg26 and actions 1-4.	Thank you for your feedback. Focus area 1: Passenger experience includes increased emphasis on promotion, publicity and education activities. Policy BM P2 pg26 and actions 1-4.	
Ruby Anngow		RPTP-0286	Operations	Request to address the poor passenger behaviour of teenagers who push each other to get a seat.	No changes to RPTP	This is outside the scope of the plan	This is outside the scope of the plan	
Ruby Anngow		RPTP-0286	Focus areas	Opposes focus areas because they do not think the plan adequately prioritises the needs of users and the community. For instance, bus capacity, missed/late buses and people not leaving the accessible seats for people who need them should be priorities.	No changes to RPTP - noting	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. Focus area 4 of the plan sets out our service design principles. We will continue to work to ensure our routes are planned with realistic run times. Focus area 2 is about further working with the community to understand needs.	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. Focus area 4 of the plan sets out our service design principles. We will continue to work to ensure our routes are planned with realistic run times. Focus area 2 is about further working with the community to understand needs.	
Ruby Anngow		RPTP-0286	Bus drivers	Request for drivers to drive safer.	No changes to RPTP - operational	We place a high priority on safety; our Safety policy is in section 2.2 of the Plan and safety actions throughout the Plan, including collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	We place a high priority on safety; our Safety policy is in section 2.2 of the Plan and safety actions throughout the Plan, including collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	
Ruby Anngow		RPTP-0286	Fares concessions	Opposes a 40% discount for youth because they believe fare should be free up to 18 years.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Ruby Anngow		RPTP-0286	Fares base fare	Supports a base fare increase for adults only.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ruby Anngow		RPTP-0286	Fares zones	Opposes zone fares because capacity and reliability issues need addressed on the longer trips (e.g. Palmerston and Mosgiel) before fares should increase	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Andrea Jones		RPTP-0287	Frequency	Wants increased frequency on the Shiel Hill-Opoho route	No changes to RPTP	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	
Andrea Jones		RPTP-0287	Fares base fare	Supports raising adult Bee card fares, particularly if it means we don't reduce bus frequencies or increase charges for children	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Andrea Jones		RPTP-0287	Fares zones	Reluctantly supports zone fare structure	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
A Homolar		RPTP-0288	Safety	Focus on greater security at the bus hubs	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of our drivers and passengers	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of our drivers and passengers	
A Homolar		RPTP-0288	Fares zones	Charging more for long trips would disincentivize people living further away to use public transport, causing worse congestion, parking and pollution.	No changes to RPTP - zone fare decision	We agree with the point, and our plan gives importance to land-use considerations which would support focusing PT investment on areas where PT performs well and drives growth/development.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Austin Smith		RPTP-0289	Collaboration with institutions	Request for city centre transport to change so they are car-free, fully pedestrian accessible and have trams.	No changes to RPTP - noting	This is outside the scope of the RPTP, but thank you for the suggestion.	This is outside the scope of the RPTP, but thank you for the suggestion.	
Austin Smith		RPTP-0289	Routes	Believes the current Dunedin routing makes it so it is only convenient to go to city centre, and transfers take too long once there.	No changes to RPTP - noting	We agree that it is important to consider non-radial travel patterns, but note that there are limitations to what can be achieved within budget constraints.	We agree that it is important to consider non-radial travel patterns, but note that there are limitations to what can be achieved within budget constraints.	
Austin Smith		RPTP-0289	Fares base fare	Opposes a base fare increase because it will harm public transport demand. Fare increases should be delayed until there is more demand.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Elizabeth Angelo-Roxborough		RPTP-0290	Dunedin Airport service	Submitter wants a Dunedin Airport bus service	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Elizabeth Angelo-Roxborough		RPTP-0290	Fares concessions	Supports keeping child fares free or low so more families can use the bus instead of driving	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Elizabeth Angelo-Roxborough		RPTP-0290	Fares local/tourists	Submitter wants tourists to pay higher fares	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Elizabeth Angelo-Roxborough		RPTP-0290	General	Submitter suggests having a surcharge for international commercial events at the stadium to pay for public transport	No changes to RPTP - noting	Our special events policy SE A1 pg. 28 outlines how we will work with event organisers to coordinate public transport to support events. This includes considering distribution of costs that are consistent with our private share policies.	Our special events policy SE A1 pg. 28 outlines how we will work with event organisers to coordinate public transport to support events. This includes considering distribution of costs that are consistent with our private share policies.	
Elizabeth Angelo-Roxborough		RPTP-0290	Bus stop infrastructure	Submitter appreciates the new bus stops on George Street, and wants an additional stop at Moray Place and Princes Street.	No changes to RPTP - operational	Thank you for your feedback. This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	Thank you for your feedback. This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
Elizabeth Angelo-Roxborough		RPTP-0290	Bus drivers	Submitter requests more training for bus drivers, including PR exercises and helping people by lowering buses for those with disabilities	No changes to RPTP - operational	The Plan includes collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	The Plan includes collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Elizabeth Angelo-Roxborough		RPTP-0290	Routes	Submitter makes route change suggestions for a City Rise bus service	No changes to RPTP - noting	<p>The specific proposal (rerouting route 63 via City Rise and Stuart St) is certainly not viable. This would undermine service levels in the dense and direct High St corridor.</p> <p>The wider question of the City Rise area is not something that the Plan specifically addresses, although it would be considered when routes in the area are reviewed. There is a policy on "Network design principles" which outlines the factors we will consider when undertaking reviews of routes.</p>	<p>The specific proposal (rerouting route 63 via City Rise and Stuart St) is certainly not viable. This would undermine service levels in the dense and direct High St corridor.</p> <p>The wider question of the City Rise area is not something that the Plan specifically addresses, although it would be considered when routes in the area are reviewed. There is a policy on "Network design principles" which outlines the factors we will consider when undertaking reviews of routes.</p>	
Elizabeth Angelo-Roxborough		RPTP-0290	Reliability	Submitter thinks buses often come early, which is problematic	No changes to RPTP - noting	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	We agree it is important to design timetables that deliver good punctuality, however some level of early and late running is unavoidable on a public transport network. We will continue to work to ensure our routes are planned with realistic run times.	
Elizabeth Angelo-Roxborough		RPTP-0290	Regional services	Suggests exploring more on-demand services	No changes to RPTP - noting	We agree that on-demand has a role to play in supporting the public transport network. However we caution that the operating cost can be quite significant and extensive on-demand services are not within current budget.	We agree that on-demand has a role to play in supporting the public transport network. However we caution that the operating cost can be quite significant and extensive on-demand services are not within current budget.	
Elizabeth Angelo-Roxborough		RPTP-0290	Fares base fare	Supports increase in adult bee card fare, but still wants it cheaper than driving	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Laura Paton		RPTP-0291	Fares base fare	Increasing the base fare is reasonable if we add a daily cap.	No changes to RPTP - base fare decision	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Laura Paton		RPTP-0291	Fares zones	Supports increased fares for longer trips, if we used zones and the increase was still affordable and not a deterrent.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sarah Wild		RPTP-0292	Timetables	Request for service hours to be extended for popular Queenstown suburbs like Lake Hayes Estate and Hanleys Farm (Route 4 and 5). Many hospitality workers work past the current hours and therefore cannot use PT to commute.	No changes to RPTP - noting	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	
Sarah Newton		RPTP-0293	Oamaru service	Submitter wants the Palmerston bus to be extended to Oamaru	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Shantraj Bethel		RPTP-0294	Routes	Request to make Brighton-City services more direct. Suggests removing the Abbotsford detour and linking the Brighton service to Concord.	No changes to RPTP - noting	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	

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Ralph Adler		RPTP-0295	Funding	Request that approach generating more funding through increasing patronage while maintaining affordable fares.	No changes to RPTP - noting	Our plan supports working to increase patronage, while keeping our services affordable for users and the community The low flat fares have been instrumental in our recent patronage growth.	Our plan supports working to increase patronage, while keeping our services affordable for users and the community The low flat fares have been instrumental in our recent patronage growth.	
Ralph Adler		RPTP-0295	Focus areas	Supports focus areas, but believes Environmental Sustainability, a Connected and Integrated Network, and Value for Money should be elevated because getting these three areas right will result in a positive passenger experience and high levels of trust.	No changes to RPTP - noting	Thank you for the thoughtful comment. We have chosen to structure the plan with people first, then environment, system and financial.	Thank you for the thoughtful comment. We have chosen to structure the plan with people first, then environment, system and financial.	
Ralph Adler		RPTP-0295	Focus areas	Agrees that 'a connected network' should be a focus area of the plan, but believes we should change the objective statement to prioritise a reliable, comprehensive and frequent service.	No changes to RPTP - noting	Thank you for the thoughtful feedback. We agree with comprehensive services, and have articulated this in the objective as being comprehensive to allow personal freedom and access to opportunities.	Thank you for the thoughtful feedback. We agree with comprehensive services, and have articulated this in the objective as being comprehensive to allow personal freedom and access to opportunities.	
Ralph Adler		RPTP-0295	Pets on buses	Request to allow dogs with a muzzle and lead on buses, as Auckland Transport allows, and suggests introducing a \$2 pet fee.	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Ralph Adler		RPTP-0295	Frequency	Request to improve frequency of Dunedin's Route 1 to reduce the number of cars on SH1.	No changes to RPTP	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Ralph Adler		RPTP-0295	Fares base fare	Reluctantly supports a base fare increase because fares have not increased in a few years.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ralph Adler		RPTP-0295	Fares zones	Opposes zone fares because they will hurt patronage growth.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Georgia Berry		RPTP-0296	Routes	Submitter wants a separate Green Island and Mosgiel bus (no further details provided)	No changes to RPTP - operational	We have an existing Mosgiel-Green Island - Dunedin service.	We have an existing Mosgiel-Green Island - Dunedin service.	
Jessica de Heij		RPTP-0297	Dunedin Airport service	Request for an airport bus	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Jessica de Heij		RPTP-0297	Collaboration with institutions	Supports better bike infrastructure, such as bike lanes and bike stops, in connection with buses and bus stops	No changes to RPTP - noting	Our plan emphasises improving multi-modal access to PT. Bike infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority and walking and cycling facilities	Our plan emphasises improving multi-modal access to PT. Bike infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority and walking and cycling facilities	

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Jessica de Heij		RPTP-0297	Funding	Would rather pay more rates than up the base fare, to help those that would not be able to afford it.	No changes to RPTP - noting	Thank you for your feedback. The funding model for PT is established through the LTP and AP processes as well as NZTA policy	Thank you for your feedback. The funding model for PT is established through the LTP and AP processes as well as NZTA policy	
Jessica de Heij		RPTP-0297	Frequency	More frequency during weekend for places like Portobello	No changes to RPTP	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Jessica de Heij		RPTP-0297	Vehicles smaller	Suggests switching to smaller vans instead of buses for community transport, but timetable them like buses.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Ann Wood		RPTP-0298	Bus drivers	Request for all drivers to drive at speeds that enable them to pull into stops. The submitter experiences a particular driver run the service consistently early and fail to pull into stops with people waiting at or running to them.	No changes to RPTP - operational	We support safe and consistent driver behaviours and this is represented in our plan	We support safe and consistent driver behaviours and this is represented in our plan	
Ann Wood		RPTP-0298	Fares zones	Opposes zone fares because they do not think passengers on the Otago Peninsula or Waikouaiti Coast should be penalised with higher fares (Routes 1 and 18 users).	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ann Wood		RPTP-0298	Fares base fare	Opposes a base fare increase because it will penalise low-income people who cannot afford other transport modes.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sandra Allan		RPTP-0299	Funding	Submitter does not like targeted transport rates in areas where there is no public transport	No changes to RPTP - noting	The funding model for PT is established through the LTP and AP processes as well as NZTA policy. There are no targeted rates where there is no immediate access to public transport	The funding model for PT is established through the LTP and AP processes as well as NZTA policy. There are no targeted rates where there is no immediate access to public transport	
Catkin Bartlett	Central Lakes Breastfeeding Charitable Trust	RPTP-0300	Safety	Concerned that public buses don't have seatbelts and they are driving on fast roads	No changes to RPTP - noting	All buses must comply with the Requirements of Urban Buses (RUB). This sets out the standards for buses. Additionally seat belts are not required by law in NZ.	All buses must comply with the Requirements of Urban Buses (RUB). This sets out the standards for buses. Additionally seat belts are not required by law in NZ.	
Catkin Bartlett	Central Lakes Breastfeeding Charitable Trust	RPTP-0300	Upper Clutha service	Wants more regional connectivity between Hawea and Wanaka and Queenstown	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities. Servicing Hawea is more challenging and based on a desk top study (Otago Community and Accessible Transport Study) and a review of the 22/23 trial, viable public transport is not affordable to the user or the community without co-funding.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Catkin Bartlett	Central Lakes Breastfeeding Charitable Trust	RPTP-0300	Routes	Wants a circular route in Queenstown between Arthur's Point and Shotover	No changes to RPTP - noting	We are not able to do this at present due to timetable constraints, but we acknowledge that as routes change with improved services under the Queenstown PT Business Case improvements, there will be opportunities to review routes and options for changing their connections.	We are not able to do this at present due to timetable constraints, but we acknowledge that as routes change with improved services under the Queenstown PT Business Case improvements, there will be opportunities to review routes and options for changing their connections.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Catkin Bartlett	Central Lakes Breastfeeding Charitable Trust	RPTP-0300	Fares zones	Thinks a zone fare structure would be okay, but it needs to not put people off using the bus and connecting them places	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Stacey Hitchcock		RPTP-0301	Dunedin Airport service	Would like to know if Dunedin Airport will be getting a service. Supports it having a higher fare.	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Stacey Hitchcock		RPTP-0301	Fares concessions	Supports free child fares because it instils lifelong habits of public transport use and reduces greenhouse gas emissions and congestion.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Stacey Hitchcock		RPTP-0301	Community transport	Supports ORC supporting community transport, especially in Alexandra, Cromwell and Wanaka.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Stacey Hitchcock		RPTP-0301	Central Otago service	Request for bus service between Alexandra and Queenstown to serve commuters. This will improve congestion, greenhouse gas emissions and road safety.	No changes to RPTP - noting	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	
Stacey Hitchcock		RPTP-0301	Routes	Request for the Mosgiel Express to stop at the Dunedin Exchange.	No changes to RPTP - noting	Route 78 does stop at the Exchange.	Route 78 does stop at the Exchange.	
Stacey Hitchcock		RPTP-0301	Focus areas	Supports focus areas but suggests adaptability be a priority as well under Passenger Experience or Build Trust. Specifically, the submitter would like us to be more responsive and engaging on changes to fares, routes, frequency and service hours.	No changes to RPTP - noting	Thank you for your thoughtful feedback. Adaptability is important and we try to do this where possible, particularly with operational issues. Fares and route changes must follow local government decision making and engagement processes and procedures. Regardless we try to be as adaptable as we can with the resources we have.	Thank you for your thoughtful feedback. Adaptability is important and we try to do this where possible, particularly with operational issues. Fares and route changes must follow local government decision making and engagement processes and procedures. Regardless we try to be as adaptable as we can with the resources we have.	
Stacey Hitchcock		RPTP-0301	Routes	Request to extend the Mosgiel service to the university.	No changes to RPTP - noting	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	
Stacey Hitchcock		RPTP-0301	Fares base fare	Supports a base fare increase for adults only. Believes concession fares should not increase.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Stacey Hitchcock		RPTP-0301	Fares zones	Supports zone fares for places like Mosgiel and Palmerston, but requests fares remain affordable (e.g. not \$6.50). Also requests we improve services for services with longer trips to add value and help with public buy-in.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Alexander Heyes		RPTP-0302	Focus areas	Supports the focus areas but thinks the plan should be a bit more specific about transport disadvantaged groups and priority demographics	No changes to RPTP - noting	Noted, with thanks. Further detail about transport-disadvantaged people is provided in section 2.8 on page 33 of the plan.	Noted, with thanks. Further detail about transport-disadvantaged people is provided in section 2.8 on page 33 of the plan.	
Alexander Heyes		RPTP-0302	Fares base fare	Does not support adult Bee card fare increases as it would cost more for transport disadvantaged groups	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Alexander Heyes		RPTP-0302	Fares zones	Supports zone fare structure, but thinks there needs to be a clear indication digitally, on maps, or driver announcements of where and when people are crossing zones	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ash P		RPTP-0303	Fares base fare	Increasing the fare means less accessibility.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
William Wark		RPTP-0306	Fares concessions	Support for affordable child and youth fares. Usage is a mindset, capture this mindset while they are young.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
William Wark		RPTP-0306	Vehicles electric	The high stall torque of electric buses needs to be considered, and its affect on the roads and environment	No changes to RPTP - noting	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	
William Wark		RPTP-0306	General	Invest some time into researching where people travel by car, places and times of day that get used besides the peak times.	No changes to RPTP - noting	Out of scope for this plan	Out of scope for this plan	
William Wark		RPTP-0306	Regional services	A ride sharing app could be beneficial for rural areas.	No changes to RPTP - noting	This is outside the scope of the plan	This is outside the scope of the plan	
William Wark		RPTP-0306	Fares concessions	Suggestion to have free fares until the ages of 20 - 25	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	
William Wark		RPTP-0306	Fares base fare	Upping the base fare risks losing patronage	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
William Wark		RPTP-0306	Fares base fare	Upping the base fare for longer trips could work as long as its cheaper than gas.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Courtney Irwin		RPTP-0307	Fares zones	Supports zone fares as long as trips within urban centres are not charged more. Longer trips such as those to Mosgiel are acceptable to charge more for.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Courtney Irwin		RPTP-0307	Fares base fare	Opposes a base fare increase.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Aline Boer		RPTP-0308	Bikes on buses	Wants bike racks on buses again	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Aline Boer		RPTP-0308	Rail and ferries	Submitter supports a train service for coastal communities, including Warrington	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Aline Boer		RPTP-0308	Fares base fare	Does not support adult Bee fare card increases in principle, but acknowledges it may be necessary for the services to continue as is	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Aline Boer		RPTP-0308	Fares zones	Submitter thinks a zone fare structure will likely cause fewer people to take the bus. They say a \$5 fare from Warrington would be enough to cause them to drive	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Aleksandra Cygan		RPTP-0310	Dunedin Airport service	Request for a Dunedin Airport service.	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Aleksandra Cygan		RPTP-0310	Frequency	Request for Route 19 to increase to a 15-minute peak frequency.	No changes to RPTP	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	
Aleksandra Cygan		RPTP-0310	Fares base fare	Supports a base fare increase only if it comes with service improvements, such as increased frequencies.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jaime Hodgson		RPTP-0311	Community transport	Supports community transport, but does not want that to come at the expense of Dunedin bus services	No changes to RPTP - noting	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information. We will not be diverting funding from existing services to fund it.	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information. We will not be diverting funding from existing services to fund it.	
Jaime Hodgson		RPTP-0311	Fares local/tourists	Submitter suggests charging cruise ship passengers more, mainly because they live in Port Chalmers and the 14 bus is often full when cruise ship is in town	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Jaime Hodgson		RPTP-0311	Fares base fare	Opposes adult Bee card fare increases, as it would likely be cheaper to drive if fares were raised	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sheryl Weir		RPTP-0312	Fares concessions	Other cities use youth or student discounts, we should too.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sheryl Weir		RPTP-0312	Fares concessions	Adults are more likely to take kids on buses for free fares.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Sheryl Weir		RPTP-0312	General	As a regular bus user from Auckland, our service and app are both fantastic.	No changes to RPTP	Noted with thanks	Noted with thanks	
Sheryl Weir		RPTP-0312	Fares zones	Introduce bus zones that accurately represent distance travelled.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sheryl Weir		RPTP-0312	Fares zones	Larger distances should be charged more.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Lisa Howard-Sullivan		RPTP-0313	Oamaru service	Request for an Oamaru-Dunedin service at a frequency of 3 return trips per day. This would enable adequate access to hospital appointments. Since Oamaru ratepayers pay targeted PT rates, they deserve service.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Lisa Howard-Sullivan		RPTP-0313	Oamaru service	Request for an within-Oamaru bus service, also servicing Weston. This would enable people to have less car reliance. The service should be affordable and regular. The large ageing population need this service. Since Oamaru ratepayers pay targeted PT rates, they deserve service.	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
Lisa Howard-Sullivan		RPTP-0313	Fares zones	Supports zones fares pending the fare is reasonable.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Andrew Whiley		RPTP-0314	Routes	Submitter also wants an 'enhanced' Mosgiel Express Service that stops at Sunnyvale Sports Ground as a Park and Ride	No changes to RPTP - noting	Although we could consider a range of variations to the Mosgiel Express services, this suggestion does not seem viable. The Mosgiel Express's speed comes from its use of the motorway; pulling it off the motorway at any point would undermine its speed.	Although we could consider a range of variations to the Mosgiel Express services, this suggestion does not seem viable. The Mosgiel Express's speed comes from its use of the motorway; pulling it off the motorway at any point would undermine its speed.	
Andrew Whiley		RPTP-0314	School services	Submitter recommends having school services to areas where students frequent after school, such as Edgar Centre and Logan Park	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	

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Andrew Whiley		RPTP-0314	Collaboration with institutions	Submitter thinks ORC should focus more closely on commuting workers and students as target patrons. To do so, ORC could work with the university to have public transport built into student fees, or an employer subsidised annual bus pass	No changes to RPTP - noting	This supported, and thank you for the suggestion. As part of our work to increase private share we will be actively engaging with large corporations and businesses including the university to explore options for fare sharing.	This supported, and thank you for the suggestion. As part of our work to increase private share we will be actively engaging with large corporations and businesses including the university to explore options for fare sharing.	
Andrew Whiley		RPTP-0314	Collaboration with institutions	Submitter wants ORC to work more closely with DCC on public transport	No changes to RPTP - noting	We work closely now with all our TAs. We have a good working relationship with DCC staff and are working to further coordinate work programmemes as outlined in Focus Area 2 of the plan.	We work closely now with all our TAs. We have a good working relationship with DCC staff and are working to further coordinate work programmemes as outlined in Focus Area 2 of the plan.	
Andrew Whiley		RPTP-0314	Fares base fare	Submitter supports raising adult bee card fares and moving to a zone fares structure, citing bus frequency and technology is being critical for confidence in the bus service	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Andrew Whiley		RPTP-0314	Fares zones	Submitter wants a free bus zone area in the CBD where travelling within the zone is free	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Janet Hewson		RPTP-0315	Fares concessions	Makes sense to keep the child/youth fares	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Janet Hewson		RPTP-0315	Fares base fare	Increase fares to maintain the standard	No changes to RPTP - base fare decision	Noting link of price with provision of service.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Janet Hewson		RPTP-0315	Focus areas	Priorities are and should be safe, reliable, courteous drivers and good for seniors.	No changes to RPTP - operational	We agree with this and captured in the plan in the quality service standards policies and actions. Specifically SQ A2 and A5 on pg. 30 to improve safety and customer experience through driver training.	We agree with this and captured in the plan in the quality service standards policies and actions. Specifically SQ A2 and A5 on pg. 30 to improve safety and customer experience through driver training.	
Janet Hewson		RPTP-0315	Fares concessions	Seems fair to match Dun and QT discounts.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Janet Hewson		RPTP-0315	Fares zones	Zones were a hassle in the past.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Steph Read		RPTP-0316	Supergold	Request to consider removing Supergold Card concessions as a means of generating more funding. The submitter states child and youth poverty rates are higher than elderly poverty rates.	No changes to RPTP - noting	SuperGold is a national scheme, we are not in a position to remove.	SuperGold is a national scheme, we are not in a position to remove.	
Steph Read		RPTP-0316	Fares concessions	Supports a youth discount of 40% across both to encourage young people to use PT.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Steph Read		RPTP-0316	Fares base fare	Supports a base fare increase if it is affordable and enables service improvements.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Steph Read		RPTP-0316	Fares zones	Supports a base fare increase over the introduction of zone fares so higher prices are distributed across all users.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Natacha Murphy		RPTP-0317	Fares concessions	Supports maintaining free fares for children as it keeps costs for families low and improves equity of access for children	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Natacha Murphy		RPTP-0317	Pets on buses	Submitter wants to be able to bring dogs on buses	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	
Natacha Murphy		RPTP-0317	Focus areas	Generally supports the focus areas, but thinks a connected and integrated network is important in the Whakatipu	No changes to RPTP - noting	We agree and this is also the focus of the Queenstown Public Transport business case. The first stage of service improvements will begin on 30 June 2025.	We agree and this is also the focus of the Queenstown Public Transport business case. The first stage of service improvements will begin on 30 June 2025.	
Natacha Murphy		RPTP-0317	Vehicles smaller	Submitter requests smaller and more frequent buses in the upper Whakatipu	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Natacha Murphy		RPTP-0317	Fares base fare	Supports adult Bee card fare increases if it increases services	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Natacha Murphy		RPTP-0317	Fares zones	Opposes zone fare structure as it could disincentivise people living further away to take the bus	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Joshua Collins		RPTP-0319	Fares concessions	Supports free child fares because they reduce traffic congestion at pick-up and drop-off times, and enable parents to afford and have time to enrol children in extracurricular activities.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Joshua Collins		RPTP-0319	Fares base fare	Opposes a base fare increase because it could result in patronage losses to the point of reducing farebox recovery. Fares should remain cheaper than city centre parking to mitigate patronage losses.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Joshua Collins		RPTP-0319	Fares zones	Opposes zone fares because it could result in patronage losses to the point of reducing farebox recovery.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jack McKay		RPTP-0320	Frequency	Wants more frequent bus services in Queenstown and wants public transport to be the easiest way to get to and from work	No changes to RPTP	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Jack McKay		RPTP-0320	Fares base fare	Submitter opposes adult Bee fare card raises--they think because people pay high rates (they are referring to QLDC), paying for buses means even more cost	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mark Hughes		RPTP-0321	Fares concessions	Keep public transport affordable and encourages young people to ride the bus.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Mark Hughes		RPTP-0321	Bus stop infrastructure	Look into putting a set of stops adjacent to the Albany St./Forth St. intersection near Hocken Library and Emersons, as well as near Te Rangihiroa.	No changes to RPTP - operational	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
Mark Hughes		RPTP-0321	Rail and ferries	Look into bringing rail trains back, a rail service for commuters between Milton and Dunedin would be good.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Mark Hughes		RPTP-0321	Bus stop infrastructure	Using bus shelters from old routes or disestablished stops, and moving them to current routes where shelters are needed (such as route 8)	No changes to RPTP - operational	Where possible we do try and repurpose bus stop infrastructure. We will pass this feedback on to our operations team	Where possible we do try and repurpose bus stop infrastructure. We will pass this feedback on to our operations team	
Mark Hughes		RPTP-0321	Fares concessions	Queenstown should get the same discounts, as there are families living there and this encourages young people to use the services.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Mark Hughes		RPTP-0321	Fares base fare	The adult fare is due for an increase, due to the costs of fuel and wages going up and to keep up the standards of our services. From \$2.00 to \$2.50.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mark Hughes		RPTP-0321	Fares zones	Keep and market low fares for all, don't penalise people who live further out to pay more.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Mackenzie Fallow		RPTP-0322	Fares concessions	Supports maintaining free fares for children as raising their fares may be inequitable	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Mackenzie Fallow		RPTP-0322	Fares base fare	Opposes increases to adult Bee card fares as it could mean less patronage.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mackenzie Fallow		RPTP-0322	Fares zones	Opposes zone fare structure as higher prices may lead to less patronage and may be confusing	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Wen Qian Yu		RPTP-0323	Fares concessions	Thinks public transport should be affordable for youth and children, but children should pay a little bit-- maybe \$1	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Wen Qian Yu		RPTP-0323	Fares concessions	Submitter suggests introducing a concession pass for some groups (e.g. students) where they pay a fixed price each month	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Kristjana Alter		RPTP-0324	Fares concessions	Child discounts makes it more affordable for the parents.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Kristjana Alter		RPTP-0324	Community transport	Community transport would help when people are caught without transport when buses don't run.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Kristjana Alter		RPTP-0324	Routes	Unsure where more routes could go, with how many get cancelled on public holidays	No changes to RPTP - noting	No response needed,	No response needed,	
Kristjana Alter		RPTP-0324	Timetables	Does not use the bus as the timetables don't suit her schedule, daughter uses the bus though.	No changes to RPTP	Thanks for your feedback	Thanks for your feedback	
Kristjana Alter		RPTP-0324	Fares base fare	Reluctantly agrees to increasing fares as we need to improve the services and pay the drivers enough.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Kristjana Alter		RPTP-0324	Fares zones	Charging more for longer distances would make the bus unaffordable for those who live further away.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Hisato Ibe		RPTP-0325	Frequency	Wants more frequent buses earlier and later into the evening at Shotover country and Five Mile	No changes to RPTP	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	
Hisato Ibe		RPTP-0325	Collaboration with institutions	Submitter wants council to reduce parking availability so more buses are used	No changes to RPTP - noting	Parking supply and charges are set and managed by our TA. Our plan includes a section on parking management, and will continue to collaborate with DCC and QLDC to look for opportunities for parking revenue to support public transport operating costs..	Parking supply and charges are set and managed by our TA. Our plan includes a section on parking management, and will continue to collaborate with DCC and QLDC to look for opportunities for parking revenue to support public transport operating costs..	
Hisato Ibe		RPTP-0325	Fares zones	Generally supports increasing fares for everyone, including children, and moving to a zone fare structure	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Nicola Bell		RPTP-0326	Ticketing system	Wants ease of payment system, such as an app	No changes to RPTP - noting	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	ORC will be implementing the National Ticketing System (Motu Move) within the next 2 years, which will include bank-card payment options.	
Nicola Bell		RPTP-0326	Upper Clutha service	Suggests a bus to Wanaka	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection

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Nicola Bell		RPTP-0326	Routes	Suggests bus routes more effectively use Gorge Rd. to Malaghans Rd. access to Lake Hayes and Shotover.	No changes to RPTP - noting	We are implementing such a route in July this year.	We are implementing such a route in July this year.	
Nicola Bell		RPTP-0326	Fares zones	Supports zone fare structure on the condition that fares for locals are fair and low	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kevin O'Kane		RPTP-0327	Vehicles smaller	Focus on electric and smaller buses - less energy and lower costs.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Kevin O'Kane		RPTP-0327	Fares base fare	Increased fares would discourage bus use.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Charlotte Bell		RPTP-0328	Frequency	Wants increased bus frequencies in Dunedin	No changes to RPTP	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	
Charlotte Bell		RPTP-0328	Fares base fare	Wants to maintain low \$2 flat fares	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Dale Belcher		RPTP-0329	Regional services	Submitter wants a service from Milton/Waihola to Dunedin, mainly to access health appointments. That service should be affordable and cost less than the cost of petrol for driving	No changes to RPTP - noting	We acknowledge the interest in PT service for Milton/Waihola. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Milton/Waihola. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Lynette Cameron		RPTP-0330	Fares concessions	Keep free child fares as many kids rely on the bus to get to school and back	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Lynette Cameron		RPTP-0330	Regional services	Wants a service from Outram to Mosgiel and back, knows people that would use it.	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Lynette Cameron		RPTP-0330	Fares base fare	Increased fares may deter people from using the bus.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
stephaney allerston		RPTP-0331	Frequency	Submitter wants more bus services to Warrington	No changes to RPTP	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Gail Armstrong		RPTP-0332	Fares concessions	Submitter thinks children 5-12 should pay a small fare, say 80 cents	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Gail Armstrong		RPTP-0332	Community transport	Supports community transport, but thinks this might come at the expense of the frequency and price of fixed urban bus services	No changes to RPTP - noting	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information. We will not be diverting funding from existing services to fund it.	Community transport is run by the community. ORC involvement may include assistance with funding applications and advise on set up, as well as coordinating public information. We will not be diverting funding from existing services to fund it.	
Gail Armstrong		RPTP-0332	Frequency	Submitter is happy to see that Route 77 frequency has increased	No changes to RPTP	Noted with thanks	Noted with thanks	
Gail Armstrong		RPTP-0332	Fares base fare	Wants to maintain flat fares and keep them low, as raising fares or moving to zone fare structure could risk losing patronage	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Richard Kemp		RPTP-0333	Timetables	Implement hourly late services in Queenstown for places like Hanley's farm, Jacks Point, lake hayes and Arrowtown. Helps people in these areas be able to go out and offer a way home minimising the risk of drink driving.	No changes to RPTP - noting	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	
Richard Kemp		RPTP-0333	Routes	Put stops at the Remarkables ski area on route 4 and Coronet peak on route 2, to help locals and visitors during ski season, should be a priority.	No changes to RPTP - noting	This is under active discussion.	This is under active discussion.	
Richard Kemp		RPTP-0333	Fares base fare	Increased fares to \$2.50 is reasonable and should not discourage people.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Richard Kemp		RPTP-0333	Fares zones	Do some research about how many people take longer trips before putting zone fares on as it might discourage these people from taking the bus. Busy routes should subsidize the less busy route rather than upping base fares.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Richard Kemp		RPTP-0333	Fares zones	Queenstown airport should not be a separate zone or have an additional charge, people might just get off at the stop before and walk some of the way like the used to, rather than paying more.	No changes to RPTP - zone fare decision	This "subzone" is for the purpose of a different cash fare to encourage speedy purchase of Bee Cards by visitors	This "subzone" is for the purpose of a different cash fare to encourage speedy purchase of Bee Cards by visitors.	
Annette Seddon		RPTP-0334	Community transport	Supports community transport, and specifically wants there to be a focus on rural Queenstown where there is currently no bus service	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Annette Seddon		RPTP-0334	Public information	Wants being able to use the buses to be less confusing and more user friendly	No changes to RPTP - noting	Focus area 1: Passenger experience includes increased emphasis on promotion, publicity and education activities. Policy BM P2 pg26 and actions 1-4.	Focus area 1: Passenger experience includes increased emphasis on promotion, publicity and education activities. Policy BM P2 pg26 and actions 1-4.	

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Annette Seddon		RPTP-0334	General	Thinks the bus system is inefficient	No changes to RPTP - noting	Our plan places importance on running efficient public transport services that represent good value for money for the community and funders. Our network design principles outlined in the Plan also work to create the most efficient routes but obtaining a balance between coverage and directness is not easy in some locations.	Our plan places importance on running efficient public transport services that represent good value for money for the community and funders. Our network design principles outlined in the Plan also work to create the most efficient routes but obtaining a balance between coverage and directness is not easy in some locations.	
Annette Seddon		RPTP-0334	Bus stop infrastructure	Submitter says there are many bus stops where the only way to get there is to drive	No changes to RPTP - noting	Unclear what the submitter means here. However the plan does emphasis the need for good multi mode access and integration in particular with the footpath environment. We will continue to collaborate with our local road controlling authorities to improve access to public transport	Unclear what the submitter means here. However the plan does emphasis the need for good multi mode access and integration in particular with the footpath environment. We will continue to collaborate with our local road controlling authorities to improve access to public transport	
Annette Seddon		RPTP-0334	Routes	Also thinks buses in Queenstown should take Gorge/Malaghans road	No changes to RPTP - noting	We are implementing such a route in July this year.	We are implementing such a route in July this year.	
Annette Seddon		RPTP-0334	Fares base fare	Supports increasing adult Bee card fare, but most importantly is to easily obtain and load money onto the card	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
C D		RPTP-0335	Focus areas	Supports the focus areas and thinks public transport should be affordable and accessible	No changes to RPTP	Noted with thanks	Noted with thanks	
C D		RPTP-0335	Safety	Submitter is concerned that her child might be squished in a car or van with a dangerous driver, though does not specify if this is a bus, community transport, etc.	No changes to RPTP	Unclear what the submitter's request is here. Safety of our passengers and drivers is a key focus of the plan.	Unclear what the submitter's request is here. Safety of our passengers and drivers is a key focus of the plan.	
C D		RPTP-0335	Fares base fare	Thinks peak fares should be low (\$2) and off peak should be higher (\$5)	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Zephyr paterson		RPTP-0336	Fares concessions	Keep child fares free, people already struggle to pay these.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Zephyr paterson		RPTP-0336	Reliability	We need to work on the reliability of the Dunedin buses as they aren't currently reliable.	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Zephyr paterson		RPTP-0336	Bus stop infrastructure	Request to look into more shelters and security at the hub, because of how rainy Dunedin is.	No changes to RPTP - operational	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network. Safety of our passengers and drivers is a priority throughout the Plan.	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network. Safety of our passengers and drivers is a priority throughout the Plan.	
Zephyr paterson		RPTP-0336	Fares base fare	Should not increase the base fare, we already charge more than its worth	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Zephyr paterson		RPTP-0336	Fares zones	We should charge more for longer trips if these included places like Oamaru.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Jess Churcher		RPTP-0337	Timetables	Wants buses to run later into the evening	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and Queenstown Public Transport service improvements business case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and Queenstown Public Transport service improvements business case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
Michael jago		RPTP-0338	Regional services	Wants a bus service from Milton to Dunedin	No changes to RPTP - noting	We acknowledge the interest in PT service for Milton/Waihola. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Milton/Waihola. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Nicola Richmond		RPTP-0339	Routes	Work on better connectivity between University and Bus Hub, walking is faster than waiting for a connection bus currently.	No changes to RPTP - noting	The point is noted. The Plan's network design principles are in accordance with this consideration	The point is noted. The Plan's network design principles are in accordance with this consideration	
Nicola Richmond		RPTP-0339	Dunedin Bus Hub	Request to make the Dunedin bus hub bus only and no cars	No changes to RPTP - noting	This is outside the scope of the plan	This is outside the scope of the plan	
Nicola Richmond		RPTP-0339	Wayfinding	Work on more accurate real time information	No changes to RPTP - operational	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	
Nicola Richmond		RPTP-0339	Vehicles smaller	Instead of increasing fares, run smaller buses more frequently at peak times. They are also easier to get around and turn.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Jay Cooper		RPTP-0340	Fares concessions	Thinks children should pay a small fare for buses	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jay Cooper		RPTP-0340	School services	Submitter thinks we should have school bus services, as they think it can be problematic having school children on the same buses as elderly people	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Jay Cooper		RPTP-0340	Fares base fare	Supports \$2.50 fares, as it is a reasonable price	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Rachel Wallace		RPTP-0341	Frequency	Wants more frequencies on bus routes. Current operating issues (lateness, standing room only) means they don't take the bus as much now	No changes to RPTP - noting	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	Our plan emphasises achieving greater frequency over time. And our Fares and Frequencies Business Case recommends improved peak frequencies across the network, but these improvements are not currently funded and any improvements would be minor at present.	
Rachel Wallace		RPTP-0341	Collaboration with institutions	Submitter thinks ORC should collaborate with city councils to increase parking fees and subsidise better public transport	No changes to RPTP - noting	Parking supply and charges are set and managed by our TA. Our plan includes a section on parking management, and will continue to collaborate with DCC and QLDC to look for opportunities for parking revenue to support public transport operating costs..	Parking supply and charges are set and managed by our TA. Our plan includes a section on parking management, and will continue to collaborate with DCC and QLDC to look for opportunities for parking revenue to support public transport operating costs..	
Rachel Wallace		RPTP-0341	Fares base fare	Opposes increasing adult Bee card fare, as price is a top priority	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Rachel Wallace		RPTP-0341	Fares zones	Unsure how they feel about the zone fare structure, particularly because the old Dunedin zones were confusing	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Janet Fraser		RPTP-0342	Fares concessions	Keep the free child fares as this helps the parents afford the service.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Janet Fraser		RPTP-0342	Vehicles electric	Supports the idea of an electric fleet	No changes to RPTP	Noted with thanks	Noted with thanks	
Janet Fraser		RPTP-0342	Fares base fare	Putting the fares up a bit keeps the service sustainable, and enough revenue to run it properly.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Janet Fraser		RPTP-0342	Fares zones	Proposed zones seems reasonable, its a user pays system.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jess Cullen		RPTP-0343	Fares base fare	Submitter thinks bus fares should be free	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jess Cullen		RPTP-0343	Routes	Wants the buses to go along Portsmouth drive	No changes to RPTP - noting	We do not have any current plans for buses to serve Portsmouth Drive, Wharf St, etc, but there may be opportunities in future reviews of services.	We do not have any current plans for buses to serve Portsmouth Drive, Wharf St, etc, but there may be opportunities in future reviews of services.	
Dave Macpherson	SaveOurTrains - Otepoti/Dunedin	RPTP-0344	Rail and ferries	Submitter wants stronger reference to passenger rail as a form of public transport, citing growing mention of it in the lower North Island and Canterbury	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Dave Macpherson	SaveOurTrains - Otepoti/Dunedin	RPTP-0344	Fares base fare	Does not support increase in adult bee card fares or zone fare structure, but understands this may have to happen due to central government	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Harry Andrew		RPTP-0345	Oamaru service	We need to look into options for places that don't have PT such as Oamaru, a bus or rail service to get people connected. Even if we start with one or two trips a day and build on it later.	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. We note the interest in rail solutions.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. We note the interest in rail solutions.	
Harry Andrew		RPTP-0345	Fares concessions	Free child fares are a good sales pitch	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Harry Andrew		RPTP-0345	Fares base fare	Agrees with increased fares if used to fund trips like Dunedin - Oamaru (option of bus or rail)	No changes to RPTP - base fare decision	Link to fare increases improving coverage. A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Harry Andrew		RPTP-0345	Focus areas	Agrees we need to build trust, but also should focus on simple and honest.	No changes to RPTP	Noted with thanks	Noted with thanks	
Harry Andrew		RPTP-0345	Regional services	Its time to start looking into public transport for the rest of Otago and not just focus on Dunedin and Queenstown.	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	
Harry Andrew		RPTP-0345	Fares zones	Should make longer trips as close to original cost as possible (i.e. \$1.99 instead of \$2.00 sales pitch)	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Liz Angel		RPTP-0346	Rail and ferries	Submitter wants a daily train service from Invercargill to Christchurch	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Abbey Chamberlain		RPTP-0348	Marketing, promotion, engagement	We need to encourage and celebrate bus use within ORC, it is missing on a lot of recruitment and advertising comms for ORC. Also push staff to use it more.	No changes to RPTP - follow up action	Agree. We will pass this on to our comms and HR teams	Agree. We will pass this on to our comms and HR teams	
Abbey Chamberlain		RPTP-0348	Marketing, promotion, engagement	More focus on attracting and educating bus users, especially tertiary students year round	No changes to RPTP - noting	We agree and this is captured in Section 2.5 pg. 26 of the Plan with actions to implement targeted promotion and outreach programmemes to educate, reduce barriers and build confidence using public transport.	We agree and this is captured in Section 2.5 pg. 26 of the Plan with actions to implement targeted promotion and outreach programmemes to educate, reduce barriers and build confidence using public transport.	
Abbey Chamberlain		RPTP-0348	Fares base fare	Agrees the current fares aren't sustainable, but if increasing, we will need to put a cap on it to retain the current usage.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Abbey Chamberlain		RPTP-0348	Fares zones	Supports increased fares for long trips, even up to \$5/\$10 from Palmerston is fair. Feels unfair to pay the same amount for half the trip.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Peter Tier		RPTP-0349	Fares concessions	Support for free child fares as a way for children to learn that PT is a viable transport choice.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Peter Tier		RPTP-0349	Rail and ferries	Opposes focus areas because the plan makes no mention of rail as a form of transport in Otago.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Peter Tier		RPTP-0349	Fares base fare	Supports a base fare increase but believes it should be paired with improvements like introducing rail as a new PT mode.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Peter Tier		RPTP-0349	Fares zones	Multiple zones should not exist within an urban area. Zones should only be at a larger scale to not discourage urban bus use.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Timothy Read		RPTP-0351	Fares zones	Supports zone fares because they are more fair.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Malcom Garner		RPTP-0352	Dunedin Airport service	Request for Dunedin Airport bus as currently there is no affordable and efficient transport choice.	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Malcom Garner		RPTP-0352	Community transport	Support for ORC supporting community transport, but is concerned volunteers will be scarce unless remunerated.	No changes to RPTP - noting	Community transport decision. Noting remuneration of drivers under the community transport model is not possible. It is run by volunteers and on a koha basis.	No change from Draft Plan. The development of a Community Transport programme is supported. Noting remuneration of drivers under the community transport model is not possible. It is run by volunteers and on a koha basis.	
Malcom Garner		RPTP-0352	Central Otago service	Request for reliable transport to Dunstan Hospital and Clyde (assuming from Alexandra).	No changes to RPTP - noting	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	
Malcom Garner		RPTP-0352	Fares zones	Supports zone fares as a way of addressing deficits.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kathryn Bennett	Age Concern Otago - Waitaki	RPTP-0353	Community transport	Supports community transport and increasing regional connectivity more generally, specifically between Oamaru and Dunedin for access to health appointments	No changes to RPTP - noting	Our plan also includes working to improve regional connectivity, with particular focus on connecting Oamaru to the Palmerston service.	Our plan also includes working to improve regional connectivity, with particular focus on connecting Oamaru to the Palmerston service.	
Kathryn Bennett	Age Concern Otago - Waitaki	RPTP-0353	Fares zones	Supports zone fare structure, but wants to continue allowing a discounted senior rate	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Stephen McIvor		RPTP-0354	Fares concessions	Supports free child fares and 40% discounted youth fares, but believes ideally only families on benefits or with disabilities would get free fares and all others would be charged a fare.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Stephen McIvor		RPTP-0354	Focus areas	Praise for focus areas.	No changes to RPTP	Noted with thanks	Noted with thanks	
Stephen McIvor		RPTP-0354	Fares base fare	Supports a base fare increase but believes fares should be income-based.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Claire Pattinson		RPTP-0355	School services	Request for separate school buses to remain in Queenstown. It is a safer option than the public bus and offers opportunity to foster relationships. Requests ORC runs a separate service for students if Ministry of Education services end, potentially charging a per-term fee.	No changes to RPTP - noting	MOE services are not regulated by ORC or this plan. Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	MOE services are not regulated by ORC or this plan. Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Anne Gatenby		RPTP-0356	School services	Supports dedicated school bus services	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Anne Gatenby		RPTP-0356	Collaboration with institutions	Wants to make Dunedin inner city more pedestrian friendly, including through reducing minimum parking requirements	No changes to RPTP - noting	This is outside the scope of the plan	This is outside the scope of the plan	
Alma Kulder		RPTP-0358	Central Otago service	Request for a bus service through Central Otago (Clyde, Cromwell and Alexandra).	No changes to RPTP - noting	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	
Cecil Hesson		RPTP-0359	Central Otago service	Requests a small bus service around Alex and transport to QT airport	No changes to RPTP - noting	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities. Options for community transport around Alexandra are also part of our Plan.	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities. Options for community transport around Alexandra are also part of our Plan.	
Raelene Cavanaugh		RPTP-0361	Community transport	Support for ORC supporting community transport. In Alexandra there, there are some volunteers who provide transport, but lots of other older people likely do not have ways of getting around.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Jenny Worth		RPTP-0362	Fares concessions	Submitter mentions that enabling children to have free fares will help them with adulthood	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
heather dore		RPTP-0363	Regional services	Request for an Outram service.	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
heather dore		RPTP-0363	Vehicles smaller	Request for smaller buses to run at off-peak hours.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Joy Davis		RPTP-0364	School services	Request to work more closely with Ministry of Education and schools because too many students needing public transport comes with problems.	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services. We work closely with MOE to make sure students have public transport options to their nearest schools.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services. We work closely with MOE to make sure students have public transport options to their nearest schools.	
Joy Davis		RPTP-0364	Rail and ferries	Request to use rail as public transport to Dunedin.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Joy Davis		RPTP-0364	Capacity	Recognises the success of Mosgiel-Dunedin buses have resulted in capacity issues. Request for greater capacity on Routes 77/78 (more frequency or bigger vehicles).	No changes to RPTP - noting	Route capacity will continue to be a consideration in our design of routes and timetables.	Route capacity will continue to be a consideration in our design of routes and timetables.	
Joy Davis		RPTP-0364	Regional services	Support for ORC supporting community transport and suggests partnering with community groups in places like Outram, whose communities would like a linking bus.	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Joy Davis		RPTP-0364	Fares base fare	Supports a base fare increase to \$2.50 because it is still a small fee for the service.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Joy Davis		RPTP-0364	Fares zones	Opposes zone fares because people should not be penalised for where they live and work.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
kristin Aarts	Clutha Development	RPTP-0367	Clutha service	Request to prioritise implementing a Dunedin-Balclutha formal bus service 3-6 times per day. From the Community Connector perspective this would increase equity, opportunity and health/wellbeing for Clutha. While it is estimated to be 3-10 years away in the plan, sooner than 3 years would be preferable.	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	
kristin Aarts	Clutha Development	RPTP-0367	Community transport	Supports ORC supporting community transport, but expresses concern that the high reliance on volunteers and lack of Council funding and coordination puts services at risk of being unsustainable.	No changes to RPTP - noting	Thank you for raising a very valid point. Community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	Thank you for raising a very valid point. Community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	

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A Nonymous		RPTP-0368	Community transport	Supports community transport if paid for via targeted rates and is supported and demanded by the community	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
A Nonymous		RPTP-0368	Frequency	Submitter thinks frequencies should be reduced on some routes outside peak hours	No changes to RPTP - noting	Offering full frequencies across long service hours is one of our key service design principles	Offering full frequencies across long service hours is one of our key service design principles	
Ingrid Piepereit		RPTP-0369	Bikes on buses	Praise for re-instating bike use.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ingrid Piepereit		RPTP-0369	Frequency	Request for smaller buses at increased frequencies on Route 18 that go to Harington Point.	No changes to RPTP	We will be renewing the contract for services in this area and considering changes. We do not expect that smaller buses will be part of the solution -- see our explainer on small buses.	We will be renewing the contract for services in this area and considering changes. We do not expect that smaller buses will be part of the solution -- see our explainer on small buses.	
Ingrid Piepereit		RPTP-0369	Fares zones	Opposes zone fares because it will discourage bus use for longer trips. Suggests offsetting costs by running fewer off-peak trips, such as on weekends, on routes such as the No. 18.	No changes to RPTP - zone fare decision	We would like to avoid reducing trips, as full frequencies across long service hours is one of our key service design principles	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ingrid Piepereit		RPTP-0369	Fares base fare	Opposes a base fare increase because keeping fares low encourages patronage and moves us away from car dependency.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Tyler Wichman		RPTP-0370	Focus areas	Opposes focus areas because iwi engagement should not be prioritised over engaging other races.	No changes to RPTP	Engagement with Māori is a requirement of legislation. Council's engagement follows HE MAHI RAU RIKĀ: Otago Regional Council Significance, Engagement and Māori Participation Policy	Engagement with Māori is a requirement of legislation. Council's engagement follows HE MAHI RAU RIKĀ: Otago Regional Council Significance, Engagement and Māori Participation Policy	
Tyler Wichman		RPTP-0370	Routes	Praise for the convenience and efficiency of Route 1 in Queenstown.	No changes to RPTP - noting	Noted with thanks	Noted with thanks	
Tyler Wichman		RPTP-0370	Timetables	Request to make services quicker, either by shortening timetables or introducing more express services. Route 8's timetable currently makes it much slower than driving.	No changes to RPTP - noting	Our plan emphasises the challenges of network design that enables good coverage as well as attractive run times. We are working to improve timetables to be more competitive with car journey times where possible.	Our plan emphasises the challenges of network design that enables good coverage as well as attractive run times. We are working to improve timetables to be more competitive with car journey times where possible.	
Tyler Wichman		RPTP-0370	Upper Clutha service	Request for a Wanaka-Queenstown bus, which would benefit visitors.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Tyler Wichman		RPTP-0370	Public information	Request for ORC to improve public information for all Otago PT, including exempt services like Intercity. Suggests an app where one can view and book all transport options.	No changes to RPTP - noting	Thank you for your helpful feedback. We agree that improving public information of exempt services particularly inter-regionally is need. We will be working on improving this as part of this Plan	Thank you for your helpful feedback. We agree that improving public information of exempt services particularly inter-regionally is need. We will be working on improving this as part of this Plan	
Tyler Wichman		RPTP-0370	Routes	Request for better connections to Arrowtown from the rest of Queenstown.	No changes to RPTP - noting	We are implementing a route via Malaghans Rd and Arthurs Point in July this year.	We are implementing a route via Malaghans Rd and Arthurs Point in July this year.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Tyler Wichman		RPTP-0370	Vehicles electric	Opposes focus areas because climate initiatives should be a current priority. Fleet electrification should only occur when the current diesel buses reach the end of their life.	No changes to RPTP - noting	We think Focus area 3 of our plan outlines our commitment to improving environmental outcomes with an emphasis on planning well functioning urban environments that support public transport and reduced car dependency, as well as a progressive roll out of fleet electrification as diesel buses reach end of life.	We think Focus area 3 of our plan outlines our commitment to improving environmental outcomes with an emphasis on planning well functioning urban environments that support public transport and reduced car dependency, as well as a progressive roll out of fleet electrification as diesel buses reach end of life.	
Tyler Wichman		RPTP-0370	Fares zones	Opposes zone fares after experiencing their commute fare triple in price in Auckland due to the introduction of zones.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jennifer Clements		RPTP-0371	Bus priority	Submitter thinks the council should prioritise road infrastructure that supports public transport	No changes to RPTP - noting	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	
Jennifer Clements		RPTP-0371	Fares local/tourists	Thinks tourists should pay more for fares	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Jennifer Clements		RPTP-0371	Central Otago service	Submitter wants a bus to Cromwell every few hours	No changes to RPTP - noting	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	
Jennifer Clements		RPTP-0371	Regional services	Submitter wants a bus to Kingston, Glenorchy every few hours	No changes to RPTP - noting	There are no plans to extend Queenstown services south of Homestead Bay or Sunshine Bay at this stage.	There are no plans to extend Queenstown services south of Homestead Bay or Sunshine Bay at this stage.	
Jennifer Clements		RPTP-0371	Fares base fare	Submitter supports increase in adult bee card fares, but also thinks we should consider monthly/annual bus passes	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jennifer Clements		RPTP-0371	Fares zones	Submitter thinks a zone fare could be introduced in the future when rural towns are more built up, but for the moment does not support them	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Delwyn Short		RPTP-0372	Community transport	Opposes community transport because focus should be on urban PT services.	No changes to RPTP - noting	Community transport decision	No change from Draft Plan. The development of a Community Transport programme is supported.	
Delwyn Short		RPTP-0372	Reliability	Request for improved reliability on Route 10/11	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Delwyn Short		RPTP-0372	Fares base fare	Opposes a base fare increase because examples like Queensland prove that services can be good while fares are low (e.g. 50 cents)	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Fiona Blight		RPTP-0373	Fares base fare	Request that base fares go no higher than \$2.50. Fares need to be as low as possible for commuters in Queenstown.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Fiona Blight		RPTP-0373	Fares zones	Opposes zone fares because it would likely make commuting within the Whakatipu Basin more expensive.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Amy Wong	Fernhill Sunshine Bay Community Association	RPTP-0374	School services	Submitter thinks not having a dedicated school bus is a problem	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Amy Wong	Fernhill Sunshine Bay Community Association	RPTP-0374	Bus stop infrastructure	Submitter says there is a lack of bus shelters along busy routes (high school and steamer wharf)	No changes to RPTP - noting	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	
Amy Wong	Fernhill Sunshine Bay Community Association	RPTP-0374	Routes	Submitter thinks there should be a bus stop closer to the QT hospital	No changes to RPTP - noting	We do not currently have any intent to add an additional stop in this area.	We do not currently have any intent to add an additional stop in this area.	
Amy Wong	Fernhill Sunshine Bay Community Association	RPTP-0374	Fares base fare	Opposes raises to fares and moving to zone fare structure. Submitter likes \$2 fares particularly for high school students because there is no dedicated school bus	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Karen Nairn		RPTP-0375	Fares concessions	Supports free child fares to build PT use habits in children.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Karen Nairn		RPTP-0375	School services	Request for more PT services for school children to meet demand.	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Karen Nairn		RPTP-0375	Fares zones	Opposes zone fares because long trips are the ones that should be most encouraged toward PT.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Mac McDonald		RPTP-0376	Fares concessions	Supports free child fare because it will enable children to build habits of using PT.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Mac McDonald		RPTP-0376	Rail and ferries	Request to consider other modes of transport, such as ferries, trams and trains. This includes a Mosgiel-Dunedin train and Otago Harbour and Lake Wakatipu ferries.	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions. A ferry service on Lake Wakatipu is part of our current offering and we are looking to expand that over time.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Mac McDonald		RPTP-0376	School services	Request to prioritise providing adequate transport for school children by running more frequent services on at-capacity routes. Currently children are late to school because buses are full. Suggests providing separate school services to relieve demand and getting funding from central government to do so.	No changes to RPTP - noting	We do already, and will continue to do so in the future. We have many factors that influence our timetables and we cannot meet all needs perfectly. School travel is a significant part of the demand for travel and we acknowledge that there are some issues with capacity and will work to improve this in the future.	We do already, and will continue to do so in the future. We have many factors that influence our timetables and we cannot meet all needs perfectly. School travel is a significant part of the demand for travel and we acknowledge that there are some issues with capacity and will work to improve this in the future.	
Mac McDonald		RPTP-0376	Fares zones	Opposes zone fares because it is important to incentivise PT for longer trips.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
David Barrell		RPTP-0377	Routes	Submitter thinks the Mosgiel express bus does not stop enough in Mosgiel	No changes to RPTP - operational	The operations and performance of this service will be reviewed.	The operations and performance of this service will be reviewed.	
David Barrell		RPTP-0377	General	Submitter requests park and rides in Mosgiel, Waikouaiti and Palmerston	No changes to RPTP - noting	We acknowledge the support for Park and Ride to support increased use of public transport. The plan outlines the importance of good integration with other modes, and will work with DCC in considering this further in the future.	We acknowledge the support for Park and Ride to support increased use of public transport. The plan outlines the importance of good integration with other modes, and will work with DCC in considering this further in the future.	
David Barrell		RPTP-0377	Fares base fare	Supports increase in adult bee card fares, but not more than \$2.50	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
David Barrell		RPTP-0377	Fares zones	Opposes zone fare structure as they say it could lead to higher emissions from people travelling further distances driving instead of bussing	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sven Thelning		RPTP-0378	Funding	Request for public transport to recover all costs so there is no rate burden.	No changes to RPTP - noting	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	
Hannah Scoullar		RPTP-0379	Safety	Believes passenger safety should be a focus.	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We looked at having safety as a separate focus area, however there was too much duplication with other focus areas.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We looked at having safety as a separate focus area, however there was too much duplication with other focus areas.	
Hannah Scoullar		RPTP-0379	Fares base fare	Opposes a base fare increase because it will add up quick for frequent users. Believes people take the bus because it is cheaper than personal vehicle travel.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Micah Bradburn		RPTP-0381	Fares zones	Would like more details on the proposed zone fare structure.	No changes to RPTP - zone fare decision	Fares for a zonal structure have not been investigated yet. This work will follow any decision to change our fare structure to a zonal system.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Micah Bradburn		RPTP-0381	School services	Request for more school buses to improve traffic congestion and support parents.	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Micah Bradburn		RPTP-0381	Reliability	Request to improve service frequency because submitter perceives routes with electric buses as being more often ahead of schedule, resulting in more users missing buses.	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Sharon Fowler		RPTP-0383	Public information	Submitter maintains the importance of being able to call ORC for inquiries and also printed timetables at bus stops, as they don't have a smart phone	No changes to RPTP - noting	We agree it is important have public information available in many forms for different users. This will continue. Printed timetables will not however be available at all stops.	We agree it is important have public information available in many forms for different users. This will continue. Printed timetables will not however be available at all stops.	
Sharon Fowler		RPTP-0383	Vehicles smaller	Submitter supported community transport, but had questions about smaller fleet options such as vans and minibuses	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Sharon Fowler		RPTP-0383	Fares base fare	Submitter thinks \$2.50 is too much of an increase, and if any cost increase was to occur then \$2.20 is better	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Sharon Fowler		RPTP-0383	Fares zones	Opposes zone fare structure as it will cost people who live farther away more money	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jan Hall		RPTP-0384	Bus stop infrastructure	Request for a bus stop at 109 Balmacewen Road. For this submitter, the closest stops are too far to get to.	No changes to RPTP - operational	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
Lesly Finn		RPTP-0385	Regional services	Request for public transport services for outlying communities such Outram to reduce transport disadvantage. Suggests the Mosgiel bus services Outram once or twice per week. Outram ratepayers receive fewer services than those in Mosgiel or Dunedin.	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Veronica Rodriguez-Jurado		RPTP-0386	Reliability	Submitter finds that buses are often unreliable, which means they are less likely to use them	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	

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Veronica Rodriguez-Jurado		RPTP-0386	Bus drivers	Submitter thinks there should be more training for bus drivers, particularly with respect to driving near cyclists because cycling tends to be quite dangerous	No changes to RPTP - operational	We place a high priority on safety; our Safety policy is in section 2.2 of the Plan and safety actions throughout the Plan, including collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	We place a high priority on safety; our Safety policy is in section 2.2 of the Plan and safety actions throughout the Plan, including collaborating with operators to deliver rigorous driver training. Will also pass your request on to our operators.	
Veronica Rodriguez-Jurado		RPTP-0386	Fares zones	Supports zone fare structure, but also offers an alternative to charge according to time (e.g. flat cost for using buses over 1.5 hours)	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Teresa Christie	Taieri Network	RPTP-0387	Community transport	Supports community transport and requests ORC works with Taieri Network, who can advocate for the community's needs, and Strath Taieri Connect Charitable Trust, who is looking to piloting a community vehicle for residents.	No changes to RPTP - noting	Any community transport will involve extensive engagement with the community, and we look forward to working with the Taieri network and Strath Taieri Connect Charitable Trust to see how we can support and co-create improved access in these areas.	Any community transport will involve extensive engagement with the community, and we look forward to working with the Taieri network and Strath Taieri Connect Charitable Trust to see how we can support and co-create improved access in these areas.	
Teresa Christie	Taieri Network	RPTP-0387	Routes	Support for on-demand trial service in Mosgiel.	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Teresa Christie	Taieri Network	RPTP-0387	General	Request for road damage from bus use be addressed by ORC.	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	
Teresa Christie	Taieri Network	RPTP-0387	Fares zones	Opposes zone fares for many reasons including the equity and financial disadvantage it will further entrench and the disincentive for rural PT use it will cause.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sandra Allan		RPTP-0388	General	Request to address invasive broom and wilding pines in the 'gorge' (assuming Kawarau Gorge) via 'spraying'.	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	
Sandra Allan		RPTP-0388	Funding	Request for a user pays model of PT funding. Requests for no general PT rates, only targeted rates in locations with service.	No changes to RPTP - noting	The funding model for PT is established through the LTP and AP processes as well as NZTA policy. 20% of public transport is funded by general rates, this recognises the wider economic and environmental value that public transport has for all of Otago.	The funding model for PT is established through the LTP and AP processes as well as NZTA policy. 20% of public transport is funded by general rates, this recognises the wider economic and environmental value that public transport has for all of Otago.	
Ann McKinnon		RPTP-0389	Regional services	Submitter requests a bus service to Outram 2-3x a week so residents can attend appointments	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Evelyn Webb		RPTP-0390	Community transport	Supports community transport and cites Canterbury services as good examples that have small fees but that users are willing to pay.	No changes to RPTP - noting	Thank you. Yes, community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	Thank you. Yes, community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Evelyn Webb		RPTP-0390	Oamaru service	Opposes no PT services being introduced in Oamaru for 3-10 years - believes it should be sooner as Oamaru ratepayers have been paying transport rates for years.	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service. All rate payers pay general transport rates to recognise the wider benefits of public transport for the region. The targeted rate in Ōamaru last year will be used to investigate the best way to connect Ōamaru to the Dunedin network.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service. All rate payers pay general transport rates to recognise the wider benefits of public transport for the region. The targeted rate in Ōamaru last year will be used to investigate the best way to connect Ōamaru to the Dunedin network.	Add a local Oamaru service to the integral services in the plan
Evelyn Webb		RPTP-0390	Fares base fare	Opposes base fare increase because it will make the service less affordable, especially for families.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Evelyn Webb		RPTP-0390	Fares zones	Opposes zone fares because it will encourage car use for people taking longer trips.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Gina Browne		RPTP-0391	Fares concessions	Supports free child fares because it improves affordability for families and encourages children to build long-term habits of using PT.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Gina Browne		RPTP-0391	Ticketing system	Praise for the service allowing 30 minutes of free transfers.	No changes to RPTP - base fare decision	Thank you -- seamless transfers are important in delivering a network that supports diverse trips	Thank you -- seamless transfers are important in delivering a network that supports diverse trips	
Gina Browne		RPTP-0391	Routes	Request for 77 to detour through Caversham or Cargill's Corner (South Dunedin).	No changes to RPTP	We will soon be operating the service through South Dunedin, although not Caversham. We will review the performance of this solution once it is in place.	We will soon be operating the service through South Dunedin, although not Caversham. We will review the performance of this solution once it is in place.	
Gina Browne		RPTP-0391	Fares base fare	Opposes a base fare increase because it will discourage patronage growth/mode shift and be too expensive for low-income people.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Gina Browne		RPTP-0391	Fares zones	Opposes a zone fare structure because it will discourage patronage growth/mode shift and be too expensive for low-income people.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Emma Dorler		RPTP-0392	Dunedin Airport service	Submitter wants a bus from the Dunedin bus hub to airport	No changes to RPTP - noting	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	A service to Balclutha is included as an integral service, and include in the plan within the next ten years, subject to funding. This service would include a connection to the airport.	
Emma Dorler		RPTP-0392	Bus drivers	Submitter thinks some bus drivers are erratic, and there could be a rating system for their driving	No changes to RPTP - operational	We support safe and consistent driver behaviours and this is represented in our plan	We support safe and consistent driver behaviours and this is represented in our plan	
Emma Dorler		RPTP-0392	Fares base fare	Submitter opposes raising adult bee card fares or moving to zone fare structure as it reduces people's access to opportunities	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Jo-Anne Ireland	Alexandra Senior Citizens	RPTP-0393	Fares concessions	Opposes free child and discounted youth fares because submitter would rather regional services be subsidised.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jo-Anne Ireland	Alexandra Senior Citizens	RPTP-0393	Focus areas	Opposes focus areas because submitter wants more focus on the wider region, not just Dunedin and Queenstown.	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	
Jo-Anne Ireland	Alexandra Senior Citizens	RPTP-0393	Regional services	Submitter from Alexandra attached petition with 62 signatures to bring PT to communities outside Queenstown and Dunedin.	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	
Adrian John Sanders		RPTP-0394	Bikes on buses	Supports prams and bikes being able to be taken on buses.	No changes to RPTP	Our customer service policy in the Plan (23) outlines what can taken on the bus. Prams are able to be taken on the bus, and we acknowledge there is some interest in being able to bring bikes, on the bus, however bike racks are provided on the outside of the bus for carrying bikes.	Our customer service policy in the Plan (23) outlines what can taken on the bus. Prams are able to be taken on the bus, and we acknowledge there is some interest in being able to bring bikes, on the bus, however bike racks are provided on the outside of the bus for carrying bikes.	
Adrian John Sanders		RPTP-0394	Frequency	Request to improve service frequencies.	No changes to RPTP	Our Plan considers improvements to frequency a major target; however we are in a constrained funding environment and any improvements can be expected to be relatively targeted.	Our Plan considers improvements to frequency a major target; however we are in a constrained funding environment and any improvements can be expected to be relatively targeted.	
Adrian John Sanders		RPTP-0394	Upper Clutha service	Request for a regular Wanaka-Queenstown bus. This would enable visitors to not have to rent cars.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities. Servicing Hawea is more challenging and based on a desk top study (Otago Community and Accessible Transport Study) and a review of the 22/23 trial, viable public transport is not affordable to the user or the community without co-funding.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Adrian John Sanders		RPTP-0394	Timetables	Request for better connectivity and frequency of services.	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and Queenstown Public Transport service improvements business case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and Queenstown Public Transport service improvements business case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
Adrian John Sanders		RPTP-0394	Fares zones	Supports zone fares only for inter-city trips but not within urban centres.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Steve Pearson		RPTP-0395	Fares base fare	Supports adult bee card fare increase, though thinks visitors and tourists should pay more	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Steve Pearson		RPTP-0395	Pets on buses	Wants change to pet policy so dogs don't need to be in crates	No changes to RPTP - noting	We acknowledge interest by some pet owners to alter our existing pet policy. The current policy however does provide for pets to be on buses in a manner that is safe for all users.	No change to Draft Plan. Proposed pet policy (consistent with current policy since 2021) is maintained.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Nancy Earth		RPTP-0396	Fares base fare	Reluctantly supports a base fare increase. Asks we protest central government support the current fares and upgrade services.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Nancy Earth		RPTP-0396	Fares zones	Reluctantly supports zone fares, but believes it will reduce PT affordability for some.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Janine Dunn		RPTP-0397	Routes	Request for Routes 44 and 55 to use Princes St and not the one ways.	No changes to RPTP - noting	From July this year this change will be in place.	From July this year this change will be in place.	
Janine Dunn		RPTP-0397	Fares base fare	Opposes base fare increases because the cost of living is high enough already.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Janine Dunn		RPTP-0397	Fares zones	Supports zone fares but not within the city.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Noemi Holzleg		RPTP-0399	Fares concessions	Supports free child fares because it will instil PT use habits.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Noemi Holzleg		RPTP-0399	Fares base fare	Request to introduce daily fare capping.	No changes to RPTP - base fare decision	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Noemi Holzleg		RPTP-0399	Vehicles electric	Supports fleet electrification.	No changes to RPTP	Noted with thanks	Noted with thanks	
Noemi Holzleg		RPTP-0399	Upper Clutha service	Request for a Wanaka-Queenstown service.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities. Servicing Hawea is more challenging and based on a desk top study (Otago Community and Accessible Transport Study) and a review of the 22/23 trial, viable public transport is not affordable to the user or the community without co-funding.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Noemi Holzleg		RPTP-0399	Upper Clutha service	Request for a Upper Clutha service.	No changes to RPTP - noting	This plan signals intent to improve transport options in our smaller centres. However based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	This plan signals intent to improve transport options in our smaller centres. However based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Noemi Holzleg		RPTP-0399	Collaboration with institutions	Request for ORC to advocate for higher-density development so urban sprawl cannot continue unchecked.	No changes to RPTP	We agree with the point, and our plan gives importance to land-use considerations which would support focusing PT investment on areas where PT performs well and drives growth/development.	We agree with the point, and our plan gives importance to land-use considerations which would support focusing PT investment on areas where PT performs well and drives growth/development.	
Noemi Holzleg		RPTP-0399	Fares base fare	Opposes base fare increase because it will reduce patronage.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Noemi Holzleg		RPTP-0399	Fares zones	Request only 2 zones, an urban zone and a regional zone.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Stacey Moore		RPTP-0400	Fares concessions	Opposes 40% youth concession because ages 0-18 should be free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Stacey Moore		RPTP-0400	Bus drivers	Drivers are unfriendly and 'creepy'.	No changes to RPTP - operational	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	
Stacey Moore		RPTP-0400	Supergold	Request for free fares of Supergold cardholders and students.	No changes to RPTP - noting	SuperGold is a national scheme with free travel between off-peak periods set by NZTA. We are not in a position to extend free travel periods for SuperGold users as this would not attract co-funding or align with our requirements to increase private share. Pg 86 of the plan outlines why 'free fares' is not supported. We aim to keep fares low for everyone.	SuperGold is a national scheme with free travel between off-peak periods set by NZTA. We are not in a position to extend free travel periods for SuperGold users as this would not attract co-funding or align with our requirements to increase private share. Pg 86 of the plan outlines why 'free fares' is not supported. We aim to keep fares low for everyone.	
Stacey Moore		RPTP-0400	Fares base fare	Opposes a base fare increase because people are already.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Nicole Weyandt		RPTP-0401	Upper Clutha service	Submitter wants regular public transport in Wanaka	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Nicole Weyandt		RPTP-0401	Fares base fare	Supports an increase in adult bee card fares, but not to the point where it will cause people to drive	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Briar Alexander		RPTP-0402	Bikes on buses	Request for bike racks to be reliably available.	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Briar Alexander		RPTP-0402	Fares base fare	Opposes a base fare increase because it will negatively impact minority groups and low-income families/individuals.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Emma Wilson		RPTP-0403	Operations	Praise for clean bus stops and buses in Queenstown and Arrowtown.	No changes to RPTP - operational	Noted with thanks	Noted with thanks	
Emma Wilson		RPTP-0403	Reliability	Praise for the reliability of the morning Arrowtown to Queenstown buses.	No changes to RPTP	Noted with thanks.	Noted with thanks.	

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Emma Wilson		RPTP-0403	Reliability	Request to improve reliability on the frequently delayed afternoon Queenstown to Arrowtown services by adjusting timetables or improving real-time tracking accuracy.	No changes to RPTP	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Emma Wilson		RPTP-0403	Marketing, promotion, engagement	Requests more engagement with bus users to inform decisions.	No changes to RPTP - follow up action	Thank you for your feedback. This will be considered when planning future public consultation.	Thank you for your feedback. This will be considered when planning future public consultation.	
Emma Wilson		RPTP-0403	Routes	Request for an Arrowtown-Queenstown route via Arthurs Point	No changes to RPTP	We are implementing such a route in July this year.	We are implementing such a route in July this year.	
Emma Wilson		RPTP-0403	Fares base fare	Opposes a base fare increase and instead would like us to focus on patronage growth.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Barbara Blatt		RPTP-0404	Bikes on buses	Wants to be able to use bike racks on buses again	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Barbara Blatt		RPTP-0404	Fares concessions	Supports retaining free fares for children as it helps families and children will be more likely to use public transport as adults	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Barbara Blatt		RPTP-0404	Upper Clutha service	Wants a regular bus service between Wanaka and Queenstown	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Barbara Blatt		RPTP-0404	Upper Clutha service	Supports community transport, but would also like bus connections between Wanaka and Queenstown	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Barbara Blatt		RPTP-0404	Collaboration with institutions	Suggests ORC should be advocating for higher density development	No changes to RPTP - noting	We do currently advocate for improving land use development and this Plan strengthens this in focus area 3 with the introduction of policies that state public transport will not be provided if urban development is inconsistent with good urban form factors as outlined in Appendix E.	We do currently advocate for improving land use development and this Plan strengthens this in focus area 3 with the introduction of policies that state public transport will not be provided if urban development is inconsistent with good urban form factors as outlined in Appendix E.	
Barbara Blatt		RPTP-0404	Fares zones	Opposes a zone fare structure, unless the zones are much wider like Oamaru-Dunedin, Cromwell to Queenstown, and Wanaka to Queenstown	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Frances McMillan		RPTP-0405	Community transport	Supports community transport and request support for Hato Hone Health Shuttles, particularly in Waitaki.	No changes to RPTP - noting	Any community transport will involve extensive engagement with the community, and we look forward engaging with Hato Hone Health Shuttles in Waitaki to see how we can support and co-create improved access in Waitaki..	Any community transport will involve extensive engagement with the community, and we look forward engaging with Hato Hone Health Shuttles in Waitaki to see how we can support and co-create improved access in Waitaki..	
Frances McMillan		RPTP-0405	Fares base fare	Supports a base fare increase if it will fund regional services, such as an Oamaru-Dunedin PT service.	No changes to RPTP - base fare decision	Note link to regional services	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Amy Taylor		RPTP-0406	Community transport	Supports ORC supporting community transport but is concerned about the reliance on volunteers. Believes drivers should be paid and compensated.	No changes to RPTP - noting	Community transport decision. Noting remuneration of drivers under the community transport model is not possible. It is run by volunteers and on a koha basis.	No change from Draft Plan. The development of a Community Transport programme is supported. Noting remuneration of drivers under the community transport model is not possible. It is run by volunteers and on a koha basis.	
Amy Taylor		RPTP-0406	Community transport	Supports community transport and believes it is a great idea. However, believes drivers should be paid, or at least should have their costs covered	No changes to RPTP - noting	Community transport decision. Noting remuneration of drivers under the community transport model is not possible. It is run by volunteers and on a koha basis.	No change from Draft Plan. The development of a Community Transport programme is supported. Noting remuneration of drivers under the community transport model is not possible. It is run by volunteers and on a koha basis.	
Amy Taylor		RPTP-0406	Marketing, promotion, engagement	Request to consult the disabled community on all access-related matters.	No changes to RPTP - noting	Focus area 2 of our Plan emphasises our intent to engage with community groups to understand their needs better and co-create solutions. We thank you for your suggestion..	Focus area 2 of our Plan emphasises our intent to engage with community groups to understand their needs better and co-create solutions. We thank you for your suggestion..	
Amy Taylor		RPTP-0406	Funding	Opposes the central government reducing funding for public transport due to the negative economic, accessibility and environmental outcomes that will result.	No changes to RPTP - noting	Government transport priorities are set through the GPS and National Land Transport Fund. We agree it is disappointing that the GPS 2024/NLTP allocates less funding for public transport and walking and cycling improvements, and the impact that has on the environment. ORC will continue to advocate for public transport to be a priority.	Government transport priorities are set through the GPS and National Land Transport Fund. We agree it is disappointing that the GPS 2024/NLTP allocates less funding for public transport and walking and cycling improvements, and the impact that has on the environment. ORC will continue to advocate for public transport to be a priority.	
Amy Taylor		RPTP-0406	Operations	Support for driver training to ensure PT is accessible for disabled people.	No changes to RPTP - operational	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	
Amy Taylor		RPTP-0406	Fares local/tourists	Requests visitors pay more than locals and do not receive concessions.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Amy Taylor		RPTP-0406	Events	Requests we do not provide extra services for cruise ship passengers because they do not pay rates.	No changes to RPTP - noting	ORC has an important role in providing public transport services that meet the needs of the region, including special services such as cruise ship demand, so it does not disrupt services for locals. Cruise ship passenger pay fares.	ORC has an important role in providing public transport services that meet the needs of the region, including special services such as cruise ship demand, so it does not disrupt services for locals. Cruise ship passenger pay fares.	
Amy Taylor		RPTP-0406	General	Request to improve urban PT network's accessibility and service levels to alleviate demand on Total Mobility, which currently has funding pressures.	No changes to RPTP - noting	Unclear of the submitters specific request, however our Plan does emphasis working towards increasing accessibility and service levels. Community transport may also assist with alleviating demand on some Total Mobility services.	Unclear of the submitters specific request, however our Plan does emphasis working towards increasing accessibility and service levels. Community transport may also assist with alleviating demand on some Total Mobility services.	
Amy Taylor		RPTP-0406	Marketing, promotion, engagement	Requests we consult the disabled community to ensure the accessibility of vehicles, public information and end-to-end journeys (e.g. footpaths around bus stops).	No changes to RPTP - noting	We agree this is important. Focus area 2 of the Plan emphasises our intent to engage with community groups to understand their needs better and co-create solutions. We thank you for your suggestion..	We agree this is important. Focus area 2 of the Plan emphasises our intent to engage with community groups to understand their needs better and co-create solutions. We thank you for your suggestion..	
Amy Taylor		RPTP-0406	Fares base fare	Support for base fare increase, through requests only adult fares increase.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

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Amy Taylor		RPTP-0406	Fares zones	Supports zone fares because longer trips cost more.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Amy Taylor		RPTP-0406	Fares base fare	Supports an adult fare increase, but not increases to the base fare that affects concession fares.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Ewan Mackie		RPTP-0408	Bus priority	Request for PT to be a greater priority in Otago, through incentivisation measures such as bus lanes.	No changes to RPTP - noting	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	Bus priority infrastructure falls with road controlling authority/TA. Throughout the plan we emphasis working closely with our TAs to prioritise PT with measures such as bus priority.	
Ewan Mackie		RPTP-0408	Vehicles electric	Support for fleet electrification being a priority.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ewan Mackie		RPTP-0408	Upper Clutha service	Request for a Wanaka-Queenstown service.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Ewan Mackie		RPTP-0408	Funding	Request for sustained investment in public transport to enable long-term mode shift.	No changes to RPTP - noting	Thank you for your feedback. The funding model for PT is established through the LTP and AP processes as well as NZTA policy	Thank you for your feedback. The funding model for PT is established through the LTP and AP processes as well as NZTA policy	
NR Murray		RPTP-0409	General	Request for research into conventional public transport routes, community support, passenger predictions, population growth impacts and emission reductions (unsure if submitter requests this in relation to community transport).	No changes to RPTP - noting	Unsure of the submitter's specific request. Our plan does include most of these things. Any further specific research would be part of a business case of specific project.	Unsure of the submitter's specific request. Our plan does include most of these things. Any further specific research would be part of a business case of specific project.	
Eva Leunissen		RPTP-0410	Bikes on buses	Submitter wants to be able to use bike racks on buses again	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Victor Yarker		RPTP-0411	Fares concessions	Opposes 40% youth discount because 0-16 years (below driving age) should be free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Victor Yarker		RPTP-0411	Regional services	Request for a bus service to Outram and Momona.	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Victor Yarker		RPTP-0411	Fares zones	Supports zone fares but on the condition that base fares are not raised.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Zuzana Blazova		RPTP-0412	Timetables	Request for service hours extend to 23:15 or even 23:30 to enable hospital workers to commute via PT (Route 8 and more broadly). Submitter works at the hospital - this is their firsthand experience and the experience of many of their colleagues.	No changes to RPTP	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
Bridget Davidson	Otago Girls' High School	RPTP-0413	Fares concessions	Supports retaining free child fares as it encourages children to use public transport as adults	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Bridget Davidson	Otago Girls' High School	RPTP-0413	Dunedin Bus Hub	Submitter thinks the Dunedin bus hub is unsafe for young people	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to manage antisocial behaviours and safety at the bus hub.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to manage antisocial behaviours and safety at the bus hub.	
Bridget Davidson	Otago Girls' High School	RPTP-0413	Operations	Submitter is concerned about overcrowding at the Dowling St. stairs/ramp bus stop particularly with school children	No changes to RPTP - operational	Thank you for your feedback. We will pass this on to our operations team	Thank you for your feedback. We will pass this on to our operations team	
Bridget Davidson	Otago Girls' High School	RPTP-0413	Routes	Submitter wants a bus service that goes over to Kaikorai Valley and to Taieri after school	No changes to RPTP - noting	We note the interest in connections via Kaikorai Valley through Green Island and beyond. Although we have no specific plans at present, we see the case and can give this consideration in our future network planning.	We note the interest in connections via Kaikorai Valley through Green Island and beyond. Although we have no specific plans at present, we see the case and can give this consideration in our future network planning.	
alan starrett		RPTP-0415	Bus drivers	Request for driver training so they are more considerate of other road users and drive more appropriate speeds.	No changes to RPTP - operational	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	
alan starrett		RPTP-0415	Fares base fare	Supports a fare that can be paid with a single coin for simplicity.	No changes to RPTP - base fare decision	PRC does not support this. The plan outlines our requirement to minimise the use of cash. The flat fare keeps the simplicity of the fare structure	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
alan starrett		RPTP-0415	Vehicles smaller	Request for buses to be smaller.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Lana Cruickshank		RPTP-0416	Fares concessions	Supports maintaining free fares for children as it makes transport affordable for families and encourages children to use public transport in the future	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Lana Cruickshank		RPTP-0416	Community transport	Supports community transport and thinks there should be a digital platform that supports carpooling and ride shares	No changes to RPTP - noting	Community transport decision. Carpooling is outside the scope of this plan. There are already digital platforms that facilitate carpooling.	No change from Draft Plan. The development of a Community Transport programme is supported. Carpooling is outside the scope of this plan. There are already digital platforms that facilitate carpooling.	
Lana Cruickshank		RPTP-0416	Active transport	Thinks ORC should support a bike share scheme	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	

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Lana Cruickshank		RPTP-0416	Active transport	Submitter stresses the importance of using many modes to get around, not just buses	No changes to RPTP - noting	The Plan takes a mode-neutral approach and where bus is the most cost effective way of meeting needs currently, we also acknowledge the importance of being adaptable in the modes we support in response to changing community needs and technological advancements.	The Plan takes a mode-neutral approach and where bus is the most cost effective way of meeting needs currently, we also acknowledge the importance of being adaptable in the modes we support in response to changing community needs and technological advancements.	
Lana Cruickshank		RPTP-0416	Fares base fare	Supports adult bee card fare increase, but maintains there needs to be concessions/subsidies for many	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Gary Bedford		RPTP-0417	Frequency	Request to improve the coordination of the Mosgiel/Green Island routes (70, 77, 78) by adding 2 additional peak-time Route 70 services. See attached letter for more detail on the request.	No changes to RPTP - noting	Noted with thanks. These changes will be considered by our operations team.	Noted with thanks. These changes will be considered by our operations team.	
Gary Bedford		RPTP-0417	Timetables	Request to improve the Saturday evening Route 70 timetable. See attached letter for more detail on the request.	No changes to RPTP - noting	Noted with thanks. These changes will be considered by our operations team.	Noted with thanks. These changes will be considered by our operations team.	
Gary Bedford		RPTP-0417	Bus drivers	Request to prioritise driver wage and working conditions in the unit contract tendering process. Suggests awarding contracts based on the coset of a collective agreement.	No changes to RPTP	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	
Liam Govan		RPTP-0418	Operations	Requests bus seats have more leg room for large bags.	No changes to RPTP - operational	All buses must comply with the Requirements of Urban Buses (RUB).	All buses must comply with the Requirements of Urban Buses (RUB).	
Liam Govan		RPTP-0418	Fares concessions	Opposes a 40% youth discount and thinks it should be 70% or even free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Liam Govan		RPTP-0418	Vehicles electric	Supports electric buses and requests more.	No changes to RPTP	Noted with thanks	Noted with thanks	
Liam Govan		RPTP-0418	Fares base fare	Request that the adult fare only be raised so students can pay affordable fares.	No changes to RPTP - base fare decision	Noting link to child and youth concessions	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Liam Govan		RPTP-0418	Regional services	Requests for more regional buses, such as from Dunedin to Invercargill and Queenstown.	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network. InterCity operate twice daily between Dunedin and Queenstown and once a day to Invercargill. We will be working to promote these exempt services as options.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network. InterCity operate twice daily between Dunedin and Queenstown and once a day to Invercargill. We will be working to promote these exempt services as options.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Liam Govan		RPTP-0418	Safety	Request to address poor passenger behaviour, typically from teenagers.	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We looked at having safety as a separate focus area, however there was too much duplication with other focus areas.	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We looked at having safety as a separate focus area, however there was too much duplication with other focus areas.	
Liam Govan		RPTP-0418	General	Praise for the bus system overall.	No changes to RPTP	Thank you	Thank you	
Liam Govan		RPTP-0418	Funding	Request for us to emphasise we need donations to keep services running.	No changes to RPTP - noting	Thank you for your feedback. This will be considered as part of our action to investigate viable private share initiatives	Thank you for your feedback. This will be considered as part of our action to investigate viable private share initiatives	
Liam Govan		RPTP-0418	Bus drivers	Request for driver pay to increase.	No changes to RPTP - operational	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	
Loretta Bush		RPTP-0419	Marketing, promotion, engagement	Submitter suggests doing more advertising on buses and at bus stops	No changes to RPTP	Noted with thanks. Exploring further advertising options is an important area for us to explore and get a great understanding of the private revenue opportunities from it.	Noted with thanks. Exploring further advertising options is an important area for us to explore and get a great understanding of the private revenue opportunities from it.	
Loretta Bush		RPTP-0419	Fares base fare	Supports increase in adult bee card fares--a 50c increase is still affordable	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Loretta Bush		RPTP-0419	Fares zones	Submitter cites fairness as a reason for zone fares	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Dannie Hawkins		RPTP-0420	Reliability	Request to improve service reliability through minimising missed trips and services running late/early. People are easily put off unreliable services.	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Dannie Hawkins		RPTP-0420	Fares base fare	Request to consider a monthly pass in the fare structure.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Dannie Hawkins		RPTP-0420	Fares zones	Supports zone fares but would like longer trip fares to remain affordable (e.g. \$1 extra).	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
charlotte flaherty		RPTP-0421	Focus areas	Supports focus areas and believes they are well articulated and comprehensive. Praise for the plan overall.	No changes to RPTP	Noted with thanks	Noted with thanks	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
charlotte flaherty		RPTP-0421	Fares base fare	Request to run a trial on the \$2.50 fare where users can opt in to pay \$2.50, rather than \$2 as a way to gauge support.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
charlotte flaherty		RPTP-0421	Fares zones	Opposes zone fares because it will make low-income users living out of the city centre bear the burden of the increase. It could also reverse mode shift for people in Mosgiel, which will increase congestion and greenhouse gas emissions.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kirstie McKinnon		RPTP-0422	Reliability	Submitter says bus 1C to Warrington is consistently late in the mornings	No changes to RPTP - noting	Our plan includes an action to set timetables that are based on realistic and achievable running times; we are aware that the Palmerston route has some issues and will be seeking to update these running times.	Our plan includes an action to set timetables that are based on realistic and achievable running times; we are aware that the Palmerston route has some issues and will be seeking to update these running times.	
Kirstie McKinnon		RPTP-0422	Timetables	Wants an earlier bus going into Warrington (roughly 5:40pm)	No changes to RPTP - noting	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	This is supported by our Fares and Frequencies Business Case and is included in our Plan's target service hours. However we currently lack the funding to implement such service hours.	
Linda Griffin		RPTP-0423	Fares concessions	Opposes a 40% youth discount because 0-15 years should be free and 16+ years should be a full adult fare.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Linda Griffin		RPTP-0423	Fares base fare	Supports a base fare increase but requests fare capping to support frequent users.	No changes to RPTP - base fare decision	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Linda Griffin		RPTP-0423	School services	Request to consider providing dedicated school buses that are free for students to address school children's demand on PT.	No changes to RPTP - noting	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	Our plan classes school-focused services as targeted services and allows for such services in cases where they serve trips that cannot be reasonably made on regular services.	
Linda Griffin		RPTP-0423	Frequency	Request to improve service frequencies in Queenstown during peak times. Even 30-minute frequencies would improve the service.	No changes to RPTP	We will be improving peak services from July; all routes will have 30 minute peak frequency or better.	We will be improving peak services from July; all routes will have 30 minute peak frequency or better.	
Linda Griffin		RPTP-0423	Fares base fare	Request to reduce the Queenstown ferry fare.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Mitzi Cole Bailey		RPTP-0424	Frequency	Request for increased frequencies for services to Jacks Point and Lake Hayes Estate.	No changes to RPTP	This is supported by our Queenstown Public Transport Business Case and improvements will be rolling out from July	This is supported by our Queenstown Public Transport Business Case and improvements will be rolling out from July	
Mitzi Cole Bailey		RPTP-0424	Fares base fare	Opposes a base fare increase because low fares encourages more PT use.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Anita Anthony		RPTP-0425	Routes	Submitter wants return bus services through Mosgiel-Green Island-South Dunedin	No changes to RPTP - noting	From July this year route 77 will be operating via South Dunedin	From July this year route 77 will be operating via South Dunedin	
Anita Anthony		RPTP-0425	Fares base fare	Thinks increasing adult bee card fares may be challenging for disabled users and beneficiaries	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Andrew Blackford	Arthurs Point Community Association	RPTP-0426	Fares concessions	Supports free child fares, especially if Ministry of Education services are removed in Queenstown.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Andrew Blackford	Arthurs Point Community Association	RPTP-0426	Fares local/tourists	Request to consider a two-fare system that charges visitors more than locals via the Bee Card.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
Andrew Blackford	Arthurs Point Community Association	RPTP-0426	Timetables	Request to add an 8:25am Route 2 to Arrowtown service to provide a half-hourly service later into the morning peak. Submitter would support removing the 6:25am service if it was required.	No changes to RPTP - noting	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	
Andrew Blackford	Arthurs Point Community Association	RPTP-0426	Timetables	Request for an earlier after school Route 2 to Arthurs Point service than 3:25pm from Stanley Street. This would improve services for St Joseph's School and Queenstown Primary School students.	No changes to RPTP - noting	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	Service improvements recommended in the Queenstown Public Transport Business case including extending service hours are included in the plan and funded; we are seeking to implement these improvements.	
Andrew Blackford	Arthurs Point Community Association	RPTP-0426	School services	Request to reroute the after school service to Arthurs Point to directly pass Queenstown Primary School and St Joseph's School.	No changes to RPTP	This would be difficult to support under our service design principles. Such diversions come at a significant cost to customer legibility and running times	This would be difficult to support under our service design principles. Such diversions come at a significant cost to customer legibility and running times	
Geraldine Tait		RPTP-0428	Oamaru service	Supports community transport, but also thinks buses from Oamaru to Dunedin would also be good	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Geraldine Tait		RPTP-0428	Safety	Submitter supports electric buses, but also wants other safety improvements like providing seat belts on buses where the roads are higher than 50 km/h	No changes to RPTP - noting	All buses must comply with the Requirements of Urban Buses (RUB). This sets out the standards for buses. Additionally seat belts are not required by law in NZ.	All buses must comply with the Requirements of Urban Buses (RUB). This sets out the standards for buses. Additionally seat belts are not required by law in NZ.	
Geraldine Tait		RPTP-0428	Routes	Supports community transport, but also thinks there could be options for on-demand buses to increase connectivity, particularly in the Warrington area	No changes to RPTP	We acknowledge the interest in on-demand solutions, but we caution that on-demand is generally only useful in reasonably narrow situations, and extensive deployment of on-demand service would be very expensive and difficult to justify.	We acknowledge the interest in on-demand solutions, but we caution that on-demand is generally only useful in reasonably narrow situations, and extensive deployment of on-demand service would be very expensive and difficult to justify.	
Geraldine Tait		RPTP-0428	Frequency	Submitter wants more frequent weekday buses to Warrington area and thinks it should be included in the Palmerston bus route	No changes to RPTP - noting	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Geraldine Tait		RPTP-0428	Fares base fare	Supports increase in adult bee card fares so long as it maintains a flat fare	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Geraldine Tait		RPTP-0428	Fares zones	Opposes zone fare structure under the impression it will lead to huge fare increases for people living outside Dunedin and high school students	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Roger Somerville		RPTP-0429	Focus areas	Opposes focus areas because the plan does not provide a wide enough range of PT services and modes. Request to leverage tech solutions to create better on-demand services, for example.	No changes to RPTP - noting	Focus Area 4 of our plan (A connected and integrated network) outlines how we design our network and services. We take a mode-neutral approach and where bus is the most cost effective way of meeting needs currently, we also acknowledge the importance of being adaptable in the modes we support in response to changing community needs and technological advancements.	Focus Area 4 of our plan (A connected and integrated network) outlines how we design our network and services. We take a mode-neutral approach and where bus is the most cost effective way of meeting needs currently, we also acknowledge the importance of being adaptable in the modes we support in response to changing community needs and technological advancements.	
Roger Somerville		RPTP-0429	Fares concessions	Opposes a youth 40% discount because 0-18 years and beneficiaries should be free.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Roger Somerville		RPTP-0429	Fares base fare	Reluctantly supports a base fare increase to offset reduced central government funding.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Liz Simpson		RPTP-0430	Fares zones	Opposes zone fares because it will be disproportionately low-income people paying more, because they are more likely to live outside the city.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jo Millar	Grey Power Otago	RPTP-0432	Focus areas	Agrees with focus areas but does not believe the reality reflects them. Requests prioritising passenger safety while boarding and alighting.	No changes to RPTP - noting	Noted with thanks. Our RPTP sets out our vision, from which we will do our best to achieve them with the best use of our resources. Passenger safety is a key focus woven through our policies and actions in each of the five focus areas	Noted with thanks. Our RPTP sets out our vision, from which we will do our best to achieve them with the best use of our resources. Passenger safety is a key focus woven through our policies and actions in each of the five focus areas	
Jo Millar	Grey Power Otago	RPTP-0432	Fares base fare	Opposes a base fare increase. Submitter would like to see services improve before fares increase.	No changes to RPTP - base fare decision	Noting link to service provision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jo Millar	Grey Power Otago	RPTP-0432	Bus drivers	Request for drivers to not stop to get food while in-service.	No changes to RPTP - operational	Thank you for your feedback. This should not be happening. We will pass this on to our operators	Thank you for your feedback. This should not be happening. We will pass this on to our operators	
Jo Millar	Grey Power Otago	RPTP-0432	Routes	Request for the St Kilda routes to travel closer to or on Princes St to be closer to community services for people who cannot walk far.	No changes to RPTP	We agree, and services will be running a direct service on Princes Street from July	We agree, and services will be running a direct service on Princes Street from July	
Jo Millar	Grey Power Otago	RPTP-0432	Timetables	Request to provide service on Easter and Christmas.	Change to RPTP	We are not in a position to commit to this at present but this is consistent with our service design principles and focus on long service hours. Recommend including provision for such changes in contracts for future-proofing.	We are not in a position to commit to this at present but this is consistent with our service design principles and focus on long service hours. Recommend including provision for such changes in contracts for future-proofing.	Include an action as PA A4 (p88) to include option in contracts to add Christmas, Good Friday, and Easter Sunday services
Paul Pope	Otago Peninsula Community Board	RPTP-0433	Bikes on buses	Request for bike rack use to be reinstated.	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Paul Pope	Otago Peninsula Community Board	RPTP-0433	Active transport	Request for public and active transport integration to continue improving on the Otago Peninsula.	No changes to RPTP - noting	Noted, and we support this in the Plan with Section 5.3 that lays out our vision to improve multi-modal access.	Noted, and we support this in the Plan with Section 5.3 that lays out our vision to improve multi-modal access.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Paul Pope	Otago Peninsula Community Board	RPTP-0433	Routes	Request to extend Harington Point service to the Taiaoroa Head so visitors and locals, decrease congestion and emissions, and to enable buses to no longer need to turn around illegally. Suggests a 2-year trial from 1 October to 30 April.	No changes to RPTP - noting	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	We do not currently have any plans to extend services in these areas. The principles to trigger adding services are outlined in our service delivery policy SD P4 on pg. 52 of the plan.	
Paul Pope	Otago Peninsula Community Board	RPTP-0433	Frequency	Request for additional Route 18 service to Peninsula in the afternoon between 2:45-3:30pm to address over-capacity. Currently, school children are disproportionately affected by this issue. Attached to the submission is a petition with 588 signatures asking for increased Route 18 peak-time service frequencies.	No changes to RPTP - noting	We will be renewing our contract for this service and considering what changes to make. We agree that peak capacity is a major concern in this area.	We will be renewing our contract for this service and considering what changes to make. We agree that peak capacity is a major concern in this area.	
Marian Krogh		RPTP-0434	Fares concessions	Supports retaining free fares for children as it makes public transport affordable for families and gets kids into good habits	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Marian Krogh		RPTP-0434	Vehicles electric	Supports the transition to electric buses	No changes to RPTP	Noted with thanks	Noted with thanks	
Marian Krogh		RPTP-0434	Frequency	Submitter wants more frequent services every 15 minutes	No changes to RPTP - noting	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	
Marian Krogh		RPTP-0434	Upper Clutha service	Submitter wants more public transport connection between Queenstown and Wanaka	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Marian Krogh		RPTP-0434	Collaboration with institutions	Submitter thinks ORC should advocate for higher density development with better public transport connections	No changes to RPTP - noting	We do currently advocate for improving land use development and this Plan strengthens this in focus area 3 with the introduction of policies that state public transport may not be provided if urban development is inconsistent with good urban form factors as outlined in Appendix E.	We do currently advocate for improving land use development and this Plan strengthens this in focus area 3 with the introduction of policies that state public transport may not be provided if urban development is inconsistent with good urban form factors as outlined in Appendix E.	
Marian Krogh		RPTP-0434	Fares concessions	Supports standardising concessions for simplicity reasons	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Marian Krogh		RPTP-0434	Fares base fare	Opposes adult bee card fare increases as it could make fewer people take the bus	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Marian Krogh		RPTP-0434	Fares zones	Supports zone fare structure, but the boundaries of the zone matter. For example, Wanaka-QT should be more, but QT-Shotover Country should not	No changes to RPTP - zone fare decision		Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
David Wills		RPTP-0435	Fares concessions	We should not keep child free and youth discounts, its the parents job to pay for their children.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
David Wills		RPTP-0435	Fares local/tourists	Only charge visitors more for longer trips, not locals.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	
David Wills		RPTP-0435	Fares local/tourists	We should look into free travel for locals and 'travel tax' for visitors, giving unlimited travel across the district.	No changes to RPTP - base fare decision	Pg 86 of the plan contains an explanation for why we don't support free public transport. Defining specific user groups and ability to pay is tricky. We support a low fare for all.	Pg 86 of the plan contains an explanation for why we don't support free public transport. Defining specific user groups and ability to pay is tricky. We support a low fare for all.	
David Wills		RPTP-0435	General	Stop using the excuse that NZ is small to avoid 'clear thinking', look at how other countries plan and subsidize their public transport	No changes to RPTP	Thank you for your feedback	Thank you for your feedback	
David Wills		RPTP-0435	Funding	Stop using terms like 'competitive market' and 'revenue sources', bus service is a sole market and competition doesn't exist.	No changes to RPTP - noting	We tender our service contracts and the plan aims to reduce barriers of entry to maintain a competitive market. There are more than one bus operator in Otago and nationally.	We tender our service contracts and the plan aims to reduce barriers of entry to maintain a competitive market. There are more than one bus operator in Otago and nationally.	
Helen White		RPTP-0436	Routes	Request to improve PT access from all areas of Queenstown.	No changes to RPTP - noting	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	
Helen White		RPTP-0436	Frequency	Request to improve frequency and routing of the Jacks Point service.	No changes to RPTP - noting	There will be direct routing from July, extending into Queenstown, and more peak services.	There will be direct routing from July, extending into Queenstown, and more peak services.	
Jacob Loveday		RPTP-0438	Frequency	We need more late running buses, especially for further out places Jacks Point. This will help night/shift workers.	No changes to RPTP	Offering full frequencies across long service hours is one of our key service design principles. We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	Offering full frequencies across long service hours is one of our key service design principles. We are not currently able to commit to an increase in service levels given funding constraints, but we will be reviewing the way that services in the area operate	
Jacob Loveday		RPTP-0438	Active transport	Need an expansion for bike safety between Jacks Point and Queenstown to incentivize bike use.	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	
Jacob Loveday		RPTP-0438	Community transport	Supports community transport, this is not currently advertised much.	No changes to RPTP	Thank you	Thank you	
Jacob Loveday		RPTP-0438	Fares concessions	Match the youth discount across Dun and QT. This gives younger people better access to work and contribute to society.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jacob Loveday		RPTP-0438	Fares zones	Do not charge more for longer trips, this will cause more people to drive and more congestion of busy roads/motorways.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Paul Hayton		RPTP-0439	Bus stop infrastructure	Request for an e-stop at the Northbound Musselburgh Rise, 192 stop as it is well used and housing developments are being built nearby.	No changes to RPTP - operational	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
Louisa Haehnel		RPTP-0440	Fares concessions	Supports retaining free fares for children, but thinks it should be extended to everyone under 18	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Louisa Haehnel		RPTP-0440	Vehicles electric	Submitter wants ORC to leverage technological solutions, including moving beyond an electric bus fleet	No changes to RPTP - noting	Thank you for your feedback. This will be considered in future planning.	Thank you for your feedback. This will be considered in future planning.	
Louisa Haehnel		RPTP-0440	Fares base fare	Supports increase in adult bee card fares with the understanding that this is a result of reduced central government funding. But still wants fares to remain low	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Timothy Murray		RPTP-0441	Fares base fare	.50c is a reasonable increase to base fares given our current objectives.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Timothy Murray		RPTP-0441	Fares zones	Upping base fares for longer trips may negatively people who live further out or have less money.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Delilah Brown		RPTP-0442	Reliability	Request to improve the Palmerston bus timetable so the evening bus is on-time. Currently it is usually 15-30 minutes behind schedule.	No changes to RPTP - noting	Our plan includes an action to set timetables that are based on realistic and achievable running times; we are aware that the Palmerston route has some issues and will be seeking to update these running times.	Our plan includes an action to set timetables that are based on realistic and achievable running times; we are aware that the Palmerston route has some issues and will be seeking to update these running times.	
Delilah Brown		RPTP-0442	Fares base fare	Opposes a base fare increase because low fares benefit people who are less fortunate or do not own a car.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Delilah Brown		RPTP-0442	Fares zones	Opposes zone fares but requests, if zones are implemented, that fares remain affordable for people who take the Palmerston bus from outside the city.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Lucy Eing		RPTP-0443	Fares concessions	Submitter thinks the concession should be 'as high as you can manage'	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Lucy Eing		RPTP-0443	Focus areas	Supports the focus areas and objectives but has concerns about achieving them in practice	No changes to RPTP	Noted with thanks. Our RPTP sets out our vision, from which we will do our best to achieve them with the best use of our resources.	Noted with thanks. Our RPTP sets out our vision, from which we will do our best to achieve them with the best use of our resources.	
Lucy Eing		RPTP-0443	Regional services	Submitter wants smaller buses in rural areas at flat fares	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future. A community transport model is being explored to improve transport for rural areas.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future. A community transport model is being explored to improve transport for rural areas.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Lucy Eing		RPTP-0443	Regional services	Supports community transport, but also thinks rural areas should have affordable and regular bus services that are cheaper than driving	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Access to services such as hospitals is a major motivator for the plan's increased focus on a region-wide network.	
Lucy Eing		RPTP-0443	Fares zones	Opposes a zone fare structure as it will cost more for people in rural areas, including high school students attending school in town	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Alice O'Neill		RPTP-0444	Fares concessions	Keep free child fares and make the youth discount equal across Dun and QT, this keeps things simple and consistent.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Alice O'Neill		RPTP-0444	Fares concessions	Keep free child fares and make the youth discount equal across Dun and QT, this keeps things simple and consistent.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Alice O'Neill		RPTP-0444	Focus areas	Supports building on integrated routes and accessibility.	No changes to RPTP	Noted with thanks	Noted with thanks	
Alice O'Neill		RPTP-0444	Fares base fare	Does not support the base fare increase, the fares already add up (especially with inflation of everything else) and topping up can be tricky as the website is not simple to use.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Alice O'Neill		RPTP-0444	Fares zones	Zones are confusing, annoying and inconvenient. Adds admin for passengers and drivers and will be tricky for tourists. They did not work in the past.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Judith Smith		RPTP-0445	Supergold	Supports a small fare increase for Supergold cardholders.	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Judith Smith		RPTP-0445	Vehicles electric	Support for the environmental benefits of electric buses but suggests they need to be bigger so there is more accessible seating.	No changes to RPTP - noting	Thank you for your feedback. This will be considered in future planning.	Thank you for your feedback. This will be considered in future planning.	
Julia L		RPTP-0447	Fares zones	Increased fares for longer trips would not be fair on people that live further out. This would make it harder for people to get to school and work or those with less money.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jane Schofield		RPTP-0449	Fares zones	Opposes zone fare structure, as it will cause financial strain for the submitter's family and children	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Jane Schofield		RPTP-0449	Fares base fare	Submitter thinks a flat rate of \$2.50 is okay. Still wants discounts for gold card or community services card	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago. These concessions will continue.	
Jane Schofield		RPTP-0449	Fares zones	Submitter thinks a flat rate of \$2.50 is okay, but opposes zone fare structure.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kelly Cameron		RPTP-0450	Fares concessions	Change free child fares to a small fare when travelling with an adult.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Kelly Cameron		RPTP-0450	Fares zones	Zoning will negatively affect/disadvantage, students, families, and those who live far away or have less money.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kelly Cameron		RPTP-0450	Fares base fare	Supports increasing the base fare, as long as we don't add zones.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kelly Cameron		RPTP-0450	Fares zones	Charging more for longer trips makes it harder for people to access education and important resources in Dunedin.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Maike Duncan		RPTP-0451	Fares zones	Opposes zone fares for youth passengers.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sally Davis		RPTP-0452	Vehicles smaller	Submitter wants small buses to be used in off-peak hours due to environmental issues	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Lorna Fraser		RPTP-0453	Fares concessions	Would prefer to keep youth fares discounted and change child fares to youth fares (when travelling with an adult)	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Lorna Fraser		RPTP-0453	Wayfinding	Work with locals to better communicate bus alerts and delays, this will help students get to and from school on time.	No changes to RPTP - operational	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	
Lorna Fraser		RPTP-0453	Wayfinding	Work with locals to better communicate bus alerts and delays, this will help students get to and from school on time.	No changes to RPTP - operational	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Lorna Fraser		RPTP-0453	Fares concessions	Standardise youth concessions, school fees are already crippling.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Lorna Fraser		RPTP-0453	Fares base fare	Not happy about it but does agree it makes sense to up the base fare.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Lorna Fraser		RPTP-0453	Fares zones	No increase for longer journeys, unless for waged workers maybe.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Fiona Jenkin		RPTP-0454	Bus drivers	Request to improve driver training and culture for better passenger experience.	No changes to RPTP - operational	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe and delivers a positive experience to users. The Plan includes collaborating with operators to deliver rigorous driver training.	
Fiona Jenkin		RPTP-0454	Focus areas	Supports focus areas but requests we focus on delivering services to all, not just transport disadvantaged people.	No changes to RPTP	Our plan emphasises delivering a convenient and reliable public transport system that improves personal freedom and access to opportunities for all.	Our plan emphasises delivering a convenient and reliable public transport system that improves personal freedom and access to opportunities for all.	
Fiona Jenkin		RPTP-0454	Reliability	Request for the bus to be on time at as many stops as possible.	No changes to RPTP - noting	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	Our service quality standards policy SQ P1 pg. 30 emphasises our commitment to reliability and punctuality, although we can not prevent all early running. We try to design timetables with accurate running times and use enforcement of timing points to monitor and reduce early running.	
Fiona Jenkin		RPTP-0454	Marketing, promotion, engagement	Request for public consultation and education efforts to encourage bus use for people living outside of Dunedin to increase patronage and understand how to improve the service.	No changes to RPTP - noting	This is included in our plan in the Branding and Marketing policies and actions on pg. 26.	This is included in our plan in the Branding and Marketing policies and actions on pg. 26.	
Fiona Jenkin		RPTP-0454	Bus stop infrastructure	Reports that the e-stops are often inaccurate.	No changes to RPTP - operational	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
Fiona Jenkin		RPTP-0454	Bus drivers	Request to improve driver working conditions, e.g. ensuring no split shifts and 2 days off in a row.	No changes to RPTP - operational	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Fiona Jenkin		RPTP-0454	Fares base fare	Opposes a base fare increase because it will become less competitive to other transport modes and will negatively affect transport disadvantaged people.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Fiona Jenkin		RPTP-0454	Fares zones	Opposes zone fares because people should not be penalised because they do not live close to work or school. If zones are implemented, fare increases should be minimal.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jen Olsen		RPTP-0455	Fares concessions	Supports retaining free fares for children as it helps families financially and helps children get accustomed to using public transport	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jen Olsen		RPTP-0455	Rail and ferries	Supports the submission from Save our Trains, which says that passenger rail needs to be part of Otago public transport moving forward	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Jen Olsen		RPTP-0455	Focus areas	Supports the focus areas but wants more emphasis on passenger rail and wages for transport workers	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions. Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe.	We do not currently have an evidence base to justify investment in rail within this Plan, but we acknowledge the community's interest in rail solutions. and have made some small changes to wording to reflect feedback on this matter. Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the living wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe.	
Jen Olsen		RPTP-0455	Fares zones	Opposes zone fare structure as people living further away already experience issues of isolation	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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D Hayman		RPTP-0456	Vehicles electric	Opposes the electrification of buses, the technology is not cost effective, the batteries are more expensive and less reliable than fuel engines.	No changes to RPTP - noting	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	
D Hayman		RPTP-0456	Funding	Any spend on rural spending should be proportionate to the rate payers in the area.	No changes to RPTP	Noted with thanks	Noted with thanks	
D Hayman		RPTP-0456	Frequency	ORC need to ensure only costs associated to core services are maintained, assess each project and all related costs. With cost of living, it would be better to reduce maintenance of services rather than increase rates.	No changes to RPTP	The point is noted. Our plan gives importance to Value for Money.	The point is noted. Our plan gives importance to Value for Money.	
D Hayman		RPTP-0456	Collaboration with institutions	ORC and DCC need to align goals. DCC are making the city less car friendly, so we need to accommodate this with other travel options that are cheap and easy to use.	No changes to RPTP - noting	We have a positive and constructive relationship with territorial authorities. All parties in these relationships are aiming to further improve our coordination and efficiency in delivering public transport, and mode choice. This intent is represented in the plan with specific emphasis on how in Focus area 2 of our Plan.	We have a positive and constructive relationship with territorial authorities. All parties in these relationships are aiming to further improve our coordination and efficiency in delivering public transport, and mode choice. This intent is represented in the plan with specific emphasis on how in Focus area 2 of our Plan.	
D Hayman		RPTP-0456	Fares zones	People are more likely to take the bus for longer journeys, rather than small trips so we should not make these more expensive.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tom Ingham		RPTP-0457	Fares concessions	Supports free child fares to encourage mode shift.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Tom Ingham		RPTP-0457	Vehicles electric	Praise for electrifying the Dunedin fleet by 2027.	No changes to RPTP	Noted with thanks	Noted with thanks	
Tom Ingham		RPTP-0457	Fares base fare	Supports a base fare increase but sees the decrease in central government funding as unfortunate.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Tom Ingham		RPTP-0457	Fares zones	Supports zone fares but would like longer trips' fares to not be too high. Patronage should still be prioritised over revenue.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Donald McKinnon		RPTP-0458	Funding	Submitter has concerns about 'enhancing third-party revenue sources' if it means council borrowing money	No changes to RPTP - noting	Third party revenue is revenue from advertising and sponsorship, and fare share schemes. This does not involve Council borrowing money.	Third party revenue is revenue from advertising and sponsorship, and fare share schemes. This does not involve Council borrowing money.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Donald McKinnon		RPTP-0458	Regional services	Submitter supports community transport, but also would like a small regular bus service between Outram-Mosgiel 3x/day	No changes to RPTP - noting	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	We acknowledge the interest in PT service for Outram. This could potentially be implemented as part of a Balclutha - Airport - Dunedin service, although the routing between the Airport and Dunedin would require further analysis. At present there is no funding available for such a service.	
Donald McKinnon		RPTP-0458	Fares zones	Supports a zone fare structure because many other councils use it	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Donald McKinnon		RPTP-0458	Fares base fare	Does not support increasing adult bee card fares, as Outram residents already pay rates for public transport but don't have any public transport	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
jo mcarthur		RPTP-0460	Fares concessions	Supports free child fares but suggests child fares are for 5-10yrs.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
jo mcarthur		RPTP-0460	Upper Clutha service	Request for a public Wanaka-Queenstown Airport service.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
jo mcarthur		RPTP-0460	Upper Clutha service	Request for public transport in the Wanaka/Upper Clutha area. It is a growing area that experiences congestion, parking issues, significant greenhouse gas emissions. Submitter sees the lack of PT service here unjust.	No changes to RPTP - noting	This plan signals intent to improve transport options in our smaller centres. However based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The development in this area does not meet those principles and is a challenge to address.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
jo mcarthur		RPTP-0460	Fares zones	Supports zone fares but believes longer trips should not be hugely more expensive.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Daniel Jolly		RPTP-0461	Rail and ferries	Submitter wants more mention of passenger rail due to potential environmental benefits	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Daniel Jolly		RPTP-0461	Vehicles smaller	Submitter wants smaller buses at different times of the day, thinking it may reduce emissions	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Matt Barnett		RPTP-0462	Funding	Submitter suggests ORC should advocate more for central government to increase funding for public transport and not accept a decrease	No changes to RPTP - noting	Government transport priorities are set through the GPS and National Land Transport Fund. Unfortunately this means in the GPS 2024 their is less funding for public transport and walking and cycling improvements. ORC will continue to advocate for public transport to be a priority.	Government transport priorities are set through the GPS and National Land Transport Fund. Unfortunately this means in the GPS 2024 their is less funding for public transport and walking and cycling improvements. ORC will continue to advocate for public transport to be a priority.	
Matt Barnett		RPTP-0462	General	Submitter thinks there should be a study done to understand the constraints, access and barriers to public transport in the different Queenstown suburbs	No changes to RPTP - noting	Thank you for your feedback. The plan considers understanding and working to address barriers to use, although more around education and in relation to multi modal access. A piece of work of this nature may be consider in future planning or business cases subject to funding.	Thank you for your feedback. The plan considers understanding and working to address barriers to use, although more around education and in relation to multi modal access. A piece of work of this nature may be consider in future planning or business cases subject to funding.	
Matt Barnett		RPTP-0462	Fares zones	Submitter opposes zone fare structure because people living farther away benefit a lot from public transport. They say people taking shorter trips have more transport options, like walking or cycling	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ray Henderson	Oamaru Ratepayers & Residents group	RPTP-0463	Fares concessions	Opposes unconditionally subsidised youth fares. Believes youth should only get concession fares when travelling with their family. When they are alone they could be commuting to work, which is unfair for older commuters.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Ray Henderson	Oamaru Ratepayers & Residents group	RPTP-0463	Fares base fare	Supports a base fare increase but not a user pays funding model.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Eve O'Brien	Central Otago Friendship Network	RPTP-0464	Accessibility	Submitter wants wheelchair accessible vehicles and more accessible bus stops, kerbs, etc.	No changes to RPTP - noting	As outline in the vehicle quality section of the plan (pg. 32) all public transport services must comply with Requirements for Urban Buses standards and this includes accessibility standards. We are working with our TAs to improve the accessibility of the street environment.	As outline in the vehicle quality section of the plan (pg. 32) all public transport services must comply with Requirements for Urban Buses standards and this includes accessibility standards. We are working with our TAs to improve the accessibility of the street environment.	
Eve O'Brien	Central Otago Friendship Network	RPTP-0464	Central Otago service	Submitter says that there is a major lack of transport options in Central Otago, particularly for elderly people who are unable to drive	No changes to RPTP - noting	Our plan increases the attention given to the regional-level network and in improving long-term connectivity for Central Otago. A Central Otago - Dunedin service beyond the current InterCity service is beyond financial reach at present, but it is included in the 30-year regional map, and we will be aiming to support community transport services in order to provide a base level of service, although we acknowledge this will not meet all needs.	Our plan increases the attention given to the regional-level network and in improving long-term connectivity for Central Otago. A Central Otago - Dunedin service beyond the current InterCity service is beyond financial reach at present, but it is included in the 30-year regional map, and we will be aiming to support community transport services in order to provide a base level of service, although we acknowledge this will not meet all needs.	
Eve O'Brien	Central Otago Friendship Network	RPTP-0464	Central Otago service	Support for community transport acknowledges that it may not be the best option in the long run, and that better connection between Alex, QT, etc. is important. They want a feasibility study done to this effect	No changes to RPTP - noting	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	Public transport links between Alexandra and Queenstown are outlined in the plan for improving regional connectivity, and we hope to implement them in the next 10 years subject to funding and alignment with central government priorities.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Eve O'Brien	Central Otago Friendship Network	RPTP-0464	Community transport	Supports community transport, but recognises that community-owned vans have historically not been sustainable due to a lack of funding for ongoing maintenance costs	No changes to RPTP - noting	Thank you for raising a very valid point. Community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	Thank you for raising a very valid point. Community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	
Eve O'Brien	Central Otago Friendship Network	RPTP-0464	Fares base fare	Supports an increase in adult bee card fares, but still wants fares to be low. Says high fares are a massive barrier	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Eve O'Brien	Central Otago Friendship Network	RPTP-0464	Fares zones	Does not support a zone fare structure as flat fares do a good job of encouraging more public transport use	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tatiana McLaren		RPTP-0465	Bus stop infrastructure	Would like stop improvements, shelters and seating, this will help with accessibility.	No changes to RPTP - operational	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	
Tatiana McLaren		RPTP-0465	General	We should focus more on getting people to use buses for the environments sake, rather than up fares and discourage people.	No changes to RPTP - noting	We agree with the submitters point and recognise the balance between keeping fares affordable, complying with our responsibility to increase private share, and keeping our system reliable and attractive to encouraging greater PT use.	We agree with the submitters point and recognise the balance between keeping fares affordable, complying with our responsibility to increase private share, and keeping our system reliable and attractive to encouraging greater PT use.	
Tatiana McLaren		RPTP-0465	Fares zones	Tentative yes for charging more for longer trips, provided the radius is quite large. Keep most of Dun at the base fare.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Protect Our Winters NZ	Protect Our Winters NZ	RPTP-0466	Bikes on buses	Request bringing bikes back on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Protect Our Winters NZ	Protect Our Winters NZ	RPTP-0466	Fares concessions	Supports maintaining free fares for children as it means they are more likely to use public transport as adults	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Protect Our Winters NZ	Protect Our Winters NZ	RPTP-0466	Frequency	Request more frequent services	No changes to RPTP	Frequency improvements are a target in the plan and we will be aiming to make such improvements, but the difficult funding position means that this will be challenging	Frequency improvements are a target in the plan and we will be aiming to make such improvements, but the difficult funding position means that this will be challenging	
Protect Our Winters NZ	Protect Our Winters NZ	RPTP-0466	Collaboration with institutions	Suggests ORC needs to advocate for higher density development, otherwise public transport won't be effective	No changes to RPTP	Noted with thanks	Noted with thanks	
Protect Our Winters NZ	Protect Our Winters NZ	RPTP-0466	Upper Clutha service	POW conducted a survey of 180 people from Wanaka, QT and elsewhere and reported on key transport themes. See attachment for more details	No changes to RPTP	Noted with thanks.	Noted with thanks.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Protect Our Winters NZ	Protect Our Winters NZ	RPTP-0466	Upper Clutha service	Request public transport connecting Queenstown and Wanaka as it could reduce car traffic and provide more transport options for people. Internal survey says people would pay somewhere between \$2 and \$15	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Protect Our Winters NZ	Protect Our Winters NZ	RPTP-0466	Fares zones	Generally opposes a zone fare structure, but thinks there should be a two tier system where urban fares are the same, but trips to rural areas (e.g. Oamaru to Dunedin) would be more	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
paula petley		RPTP-0467	Bus stop infrastructure	Wants better maintenance of the bus hub, as woodwork/seats are faded and tagged	No changes to RPTP - operational	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	This request will be forwarded to our operations team. Noting throughout the plan we emphasis working closely with our TAs to coordinate new infrastructure work programmemes.	
paula petley		RPTP-0467	Wayfinding	Many of the new e-stops don't work	No changes to RPTP - operational	We will pass this on to our operations team	We will pass this on to our operations team	
paula petley		RPTP-0467	Fares zones	Supports zone fare structure, but thinks there should be two zones, with Zone 1 including Mosgiel, Port Chalmers, Portobello and Waitati, with Zone 2 being further away	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tamsin Greer		RPTP-0468	Fares concessions	Keep free until about 10y/o, once they can travel alone, they can incur a small fee. Students make up a lot of patronage, we could utilize this.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Tamsin Greer		RPTP-0468	Focus areas	Agrees with focuses, however try to achieve these without negatively impacting those who live further out.	No changes to RPTP	Noted with thanks	Noted with thanks	
Tamsin Greer		RPTP-0468	School services	Supports the Palmerston service, this is a huge help for students.	No changes to RPTP	Noted with thanks	Noted with thanks	
Tamsin Greer		RPTP-0468	Fares base fare	Agree with a small base fare increase	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Tamsin Greer		RPTP-0468	Fares zones	No to increased fares for longer trips, these isolated communities already have few and limited options. Zones and increases will alienate them more.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kylie Preedy		RPTP-0469	Fares zones	Request for more information on proposed zone fare structure.	No changes to RPTP - zone fare decision	Fares for a zonal structure have not been investigated yet. This work will follow any decision to change our fare structure to a zonal system.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Kylie Preedy		RPTP-0469	Fares zones	Opposes zone fares because they do not want to be charged for longer (time) trips.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Rosemary Matchett		RPTP-0470	Fares concessions	Opposes free child fares, but thinks there should be a concession	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Rosemary Matchett		RPTP-0470	Fares zones	Generally thinks a zone fare structure charging more based on a km and driver hourly basis makes sense, but needs more details and therefore does not support	No changes to RPTP - zone fare decision	Fares for a zonal structure have not been investigated yet. This work will follow any decision to change our fare structure to a zonal system.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Rosemary Matchett		RPTP-0470	General	"Keep up the good work"	No changes to RPTP	Noted with thanks. Our RPTP sets out our vision, from which we will do our best to achieve them with the best use of our resources.	Noted with thanks. Our RPTP sets out our vision, from which we will do our best to achieve them with the best use of our resources.	
Rosemary Matchett		RPTP-0470	Fares base fare	Supports adult bee card fare increase because it is better to pay a bit more than reduce services	No changes to RPTP - base fare decision	Noting link to service provision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Rosemary Matchett		RPTP-0470	Regional services	Supports community transport, but eventually wants a regular service between smaller towns and rural areas	No changes to RPTP	We agree and this is represented in our ambitions.	We agree and this is represented in our ambitions.	
Rosemary Matchett		RPTP-0470	Regional services	Wants public transport trials to begin sooner than 3 years	No changes to RPTP	We would like them to as well. However we are constrained by our funding environment	We would like them to as well. However we are constrained by our funding environment	
paula petley		RPTP-0471	Vehicles electric	Does not Support a full electric fleet. Issues with the lifespan and disposal of the batteries, they also contain contaminants that are bad for the environment. Supports half electric fleet.	No changes to RPTP - noting	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB). Further, NZTA's Zero emission bus economics study (https://www.nzta.govt.nz/resources/research/reports/718/) indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon. Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our needs in most cases.	
Colin Stevenson		RPTP-0472	Community transport	Community transport is better for environmental and social well-being	No changes to RPTP	Agree	Agree	
Colin Stevenson		RPTP-0472	Community transport	Community transport is better for environmental and social well-being	No changes to RPTP	Agree	Agree	
Colin Stevenson		RPTP-0472	Fares concessions	Agree with 100% discount for children as it develops positive behaviour patterns	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Colin Stevenson		RPTP-0472	Fares concessions	Agree with 100% discount for children as it develops positive behaviour patterns	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Colin Stevenson		RPTP-0472	Ticketing system	Agree with the use of credit card or bus card for payment	No changes to RPTP	Noted with thanks.	Noted with thanks.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Colin Stevenson		RPTP-0472	Bus drivers	Agree with having the bus driver in a shielded compartment	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Colin Stevenson		RPTP-0472	Ticketing system	Agree with the use of credit card or bus card for payment	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Colin Stevenson		RPTP-0472	Bus drivers	Agree with having the bus driver in a shielded compartment	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Colin Stevenson		RPTP-0472	Bikes on buses	Need more bike carrying capacity	No changes to RPTP - operational	Outside the scope of this plan	Outside the scope of this plan	
Colin Stevenson		RPTP-0472	Community transport	Vans funded by communities with running costs by ORC would be excellent for small rural towns - safer transport for elderly sole drivers	No changes to RPTP - noting	The community transport model is run by the community, or a koha basis. ORC involvement may include assistance with funding applications and advice on set up, as well as coordinating public information. We are not in a position to fund the running costs.	The community transport model is run by the community, or a koha basis. ORC involvement may include assistance with funding applications and advice on set up, as well as coordinating public information. We are not in a position to fund the running costs.	
Colin Stevenson		RPTP-0472	Community transport	Vans funded by communities with running costs by ORC would be excellent for small rural towns - safer transport for elderly sole drivers	No changes to RPTP - noting	The community transport model is run by the community, or a koha basis. ORC involvement may include assistance with funding applications and advice on set up, as well as coordinating public information. We are not in a position to fund the running costs.	The community transport model is run by the community, or a koha basis. ORC involvement may include assistance with funding applications and advice on set up, as well as coordinating public information. We are not in a position to fund the running costs.	
Colin Stevenson		RPTP-0472	Fares concessions	Agree with standardised discounts across Dunedin and Queenstown as we are all one region	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Colin Stevenson		RPTP-0472	Fares concessions	Agree with standardised discounts across Dunedin and Queenstown as we are all one region	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Colin Stevenson		RPTP-0472	Fares zones	Agree with zone changes	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Colin Stevenson		RPTP-0472	Fares zones	You should expect to pay more for longer trips using the zone areas	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Colin Stevenson		RPTP-0472	Fares zones	Agree with zone changes	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Colin Stevenson		RPTP-0472	Fares zones	You should expect to pay more for longer trips using the zone areas	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Julie Taverner	Hato Hone St John	RPTP-0473	Community transport	Supports community transport and thinks ORC should do it in a way similar to Waikato Regional Council	No changes to RPTP	Thank you. Yes, community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	Thank you. Yes, community transport is very successful in Canterbury and Waikato and we hope to build our community transport in a similarly sustainable way	
Jane Terry		RPTP-0474	Focus areas	Highest priority focuses being points 1, 4 and 5	No changes to RPTP	Noted with thanks	Noted with thanks	
Jane Terry		RPTP-0474	Timetables	Work on timetabling to spread out the buses. e.g. a bus ever 5 mins rather than 3 buses all at once then a 20min wait.	No changes to RPTP	Point is accepted -- this is supported by the Plan's Service Design Principles	Point is accepted -- this is supported by the Plan's Service Design Principles	
Jane Terry		RPTP-0474	Vehicles smaller	Supports smaller buses running with an increased service.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
Jane Terry		RPTP-0474	Fares concessions	Keep free child fares, families aren't able to rely on school buses anymore.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jane Terry		RPTP-0474	Fares zones	Opposes increased fares for longer trips, this will make it less economical and make car use more convenient and not as costly compared.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jane Terry		RPTP-0474	Fares zones	Don't charge more for longer trips, the Palmerston bus already has limited runs and its often outside of Supergold hours making it less attractive.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jana McCall		RPTP-0475	Upper Clutha service	A regular bus service for workers as well as tourists between Wanaka and Queenstown and connecting to surrounds (Hawea, Luggate)	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Jana McCall		RPTP-0475	Focus areas	Reliable, regular, safe and affordable public transport is an extremely important part of any community	No changes to RPTP	We agree. Our plan emphasises delivering a convenient and reliable public transport system that is safe and affordable for our community and funders.	We agree. Our plan emphasises delivering a convenient and reliable public transport system that is safe and affordable for our community and funders.	
Jana McCall		RPTP-0475	Fares concessions	Agree with discounts for children as it gives them some independence and encourages them to use public transport	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jana McCall		RPTP-0475	Fares base fare	Agree with increase in fares is needed to keep the service running	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jana McCall		RPTP-0475	Fares zones	A small increase for longer trips seems reasonable as long as the cost does no inhibit those who really need the service or disincentivise people who may just switch to their cars.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Hugo de Cosse Brissac		RPTP-0476	Fares base fare	Opposes adult bee card fare increase. Taking the bus should be cheaper than driving	No changes to RPTP - base fare decision	Noting link to driving costs	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Hugo de Cosse Brissac		RPTP-0476	Upper Clutha service	Requests public transport in Wanaka, Lake Hawea, Luggate, Kingston to Queenstown	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities. Servicing Hawea, Luggate and Kingston are more challenging and based on a desk top study (Otago Community and Accessible Transport Study) and a review of the 22/23 trial, viable public transport is not affordable to the user or the community without co-funding.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Hugo de Cosse Brissac		RPTP-0476	Focus areas	Opposes the 'value for money' focus area because public transport should be run as a service, not a business and funding should come from disincentivising private car travel (e.g. parking fees, congestion charging)	No changes to RPTP - noting	Thank you for your point. Public transport is funded with public money and we have obligations to make sure that funds are used efficiently. We also must comply with central government expectations to not jeopardise future funding.	Thank you for your point. Public transport is funded with public money and we have obligations to make sure that funds are used efficiently. We also must comply with central government expectations to not jeopardise future funding.	
Hugo de Cosse Brissac		RPTP-0476	Fares concessions	Supports standardising youth concession, but also thinks it should be raised to 50%	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Hugo de Cosse Brissac		RPTP-0476	Fares zones	Opposes zone fare structure as they say it is worse for people who cannot afford to live closer to town	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Duncan Eddy	West Harbour Community Board	RPTP-0477	Funding	Supports increasing private share by maximising advertising revenue, rather than increasing fares	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Duncan Eddy	West Harbour Community Board	RPTP-0477	Rail and ferries	Interested in a commuter train between Port Chalmers and Mosgiel in the long term	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Duncan Eddy	West Harbour Community Board	RPTP-0477	Routes	Welcomes previously planned extensions to number 14 bus	No changes to RPTP - noting	Thank you -- we are proud to offer a regular and reliable service in the West Harbour area. Although we do not expect the area to be a priority for major service-level improvements, we do have high peak demand and seek to ensure we have the capacity to meet this demand, especially after school.	Thank you -- we are proud to offer a regular and reliable service in the West Harbour area. Although we do not expect the area to be a priority for major service-level improvements, we do have high peak demand and seek to ensure we have the capacity to meet this demand, especially after school.	
Duncan Eddy	West Harbour Community Board	RPTP-0477	Fares zones	Supports maintaining a flat fare, as zones could potentially be expensive and confusing	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jules Radich	Dunedin City Council	RPTP-0478	Clutha service	Submitter supports community transport, but also wants potential commuter services between Balclutha and Dunedin	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Jules Radich	Dunedin City Council	RPTP-0478	Oamaru service	Submitter supports community transport, but also wants potential commuter services between Oamaru and Dunedin	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Jules Radich	Dunedin City Council	RPTP-0478	Marketing, promotion, engagement	Submitter wants more emphasis on increasing patronage, including through promotion and marketing of services	No changes to RPTP - noting	Agree, and this is included in our plan in the Branding and Marketing policies and actions on pg. 26.	Agree, and this is included in our plan in the Branding and Marketing policies and actions on pg. 26.	
Jules Radich	Dunedin City Council	RPTP-0478	Fares concessions	Supports maintaining free fares for children and standardising youth concession to promote confidence and lifelong habits	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jules Radich	Dunedin City Council	RPTP-0478	Regional services	Submitter wants more emphasis on emissions reductions, including investigating commuter services for regional centres	No changes to RPTP	Our plan is supportive of these ambitions.	Our plan is supportive of these ambitions.	
Jules Radich	Dunedin City Council	RPTP-0478	Focus areas	Submitter requests a Dunedin network review, including consideration of the bus hub, existing transport infrastructure, and the integration of schools.	No changes to RPTP - noting	Thank you for the thoughtful feedback. Network and service planning are a key priority in Focus Area 4 A connected and integrated network. This includes how we manage school services and work with our partners to deliver key transport infrastructure.	Thank you for the thoughtful feedback. Network and service planning are a key priority in Focus Area 4 A connected and integrated network. This includes how we manage school services and work with our partners to deliver key transport infrastructure.	
Jules Radich	Dunedin City Council	RPTP-0478	Routes	Submitter wants service improvement options for the Northern Coast and Central City	No changes to RPTP	We note the interest in such services; we are not currently in a position to commit to service improvements in these areas but they will be considered in the future.	We note the interest in such services; we are not currently in a position to commit to service improvements in these areas but they will be considered in the future.	
Mayor Gary Kircher	Waitaki District Council	RPTP-0479	Community transport	Strongly supports community transport in the Waitaki district	No changes to RPTP	Noted with thanks	Noted with thanks	
Mayor Gary Kircher	Waitaki District Council	RPTP-0479	Focus areas	(Focus area) Passenger experience: Provide public transport services that promote social inclusion and respect the safety and wellbeing of all passengers.	Change to RPTP	Thank you for your suggestion. Including the words 'social inclusion' does nicely wrap up our objective. We would like to continue to use 'useful' public transport though.	Thank you for your suggestion. Including the words 'social inclusion' does nicely wrap up our objective. We would like to continue to use 'useful' public transport though.	Change Objective 1: Passenger experience to 'Provide useful public transport services that promote social inclusion and respect the safety and wellbeing of all passengers' Change needed on Pg 17, and 19. Remove the definition of 'transport disadvantaged' from the last bullet points on pg. 19.
Mayor Gary Kircher	Waitaki District Council	RPTP-0479	Focus areas	(Focus area): Environmental sustainability: Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and development	Change to RPTP	Thank you for your suggestion. This wordsmithing suggestion is great and captures exactly the intent of the objective.	Thank you for your suggestion. Accept suggestion but substitute reliance for dependence	Change Objective 3: Environmental sustainability to: Invest in a public transport system that reduces dependence on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and development.
Mayor Gary Kircher	Waitaki District Council	RPTP-0479	Focus areas	(Focus areas): Cost effectiveness: Provide public transport services in a manner that presents good value for money	No changes to RPTP - noting	Thank you for your suggestion. We believe 'represents' is more appropriate and grammatically correct that 'presents' in this context.	Thank you for your suggestion. We believe 'represents' is more appropriate and grammatically correct that 'presents' in this context.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Mayor Gary Kircher	Waitaki District Council	RPTP-0479	Focus areas	(Focus area): Connected and integrated network: Deliver a reliable and convenient public transport system that improves personal freedom, supports local economies and enhances community resilience.	No changes to RPTP - noting	Thank you for your suggestion. We prefer the more personal working of access to opportunities.	Thank you for your suggestion. We prefer the more personal working of access to opportunities.	
Mayor Gary Kircher	Waitaki District Council	RPTP-0479	Focus areas	(Focus area) Aligning with community needs and priorities: Proactively engage with communities and organisations, including iwi, to foster trust and ensure public transport projects meet local demand and align with community priorities.	No changes to RPTP - noting	Thank you for your suggestion. We believe 'meeting local demand' is already captured in 'aligning with community priorities'.	Thank you for your suggestion. We believe 'meeting local demand' is already captured in 'aligning with community priorities'.	
Mayor Gary Kircher	Waitaki District Council	RPTP-0479	Oamaru service	Wants daily bus services between Oamaru and Dunedin, a fixed route urban service between Weston and Oamaru and an on-demand service within Oamaru	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	
Alice Milne		RPTP-0480	Fares base fare	Increased base fare of \$2.50 is better than a decreased service.	No changes to RPTP - base fare decision	Noting link to service provision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Alice Milne		RPTP-0480	Routes	The Arrowtown-Queenstown route through Frankton adds unnecessary time, make it direct instead. This would also bring more access to economic and tourism opportunities in Frankton.	No changes to RPTP	Thank you -- the direct Malaghans Road route will be implemented from July.	Thank you -- the direct Malaghans Road route will be implemented from July.	
Victoria Crockford	QLDC Climate and Biodiversity Reference Group	RPTP-0481	Active transport	Wants more concrete targets related to mode shift in alignment with our 'multi-modal access' section	No changes to RPTP - noting	Achieving mode-shift is a collective effort with ORC and our partners across the region. This strategy document does not include targets rather they sit in the Dunedin Future Development Strategy 2024 which was a collective DCC and ORC strategy, and the Queenstown Integrated Transport Business case.	Achieving mode-shift is a collective effort with ORC and our partners across the region. This strategy document does not include targets rather they sit in the Dunedin Future Development Strategy 2024 which was a collective DCC and ORC strategy, and the Queenstown Integrated Transport Business case.	
Victoria Crockford	QLDC Climate and Biodiversity Reference Group	RPTP-0481	Central Otago service	Notes the business case for Upper Clutha public transport has been withdrawn, and that these communities need reliable public transport options to reduce private vehicle dependency	No changes to RPTP - noting	Noted. Our plan includes these aspirations,	Noted. Our plan includes these aspirations,	
Victoria Crockford	QLDC Climate and Biodiversity Reference Group	RPTP-0481	Funding	Wants ORC to explore alternative public transport funding models, including potential targeted rates, developer contributions toward infrastructure in new developments and a commercial rate based on capital value rather than the proposed 'uniform' general rate change	No changes to RPTP - noting	Funding action A3 outlines our intent to 'Work with partner agencies and other stakeholders to increase private revenue sources and explore alternative opportunities to fund the public transport network' The wider funding model is established through the LTP, AP and the GPS/NLTP	Funding action A3 outlines our intent to 'Work with partner agencies and other stakeholders to increase private revenue sources and explore alternative opportunities to fund the public transport network' The wider funding model is established through the LTP, AP and the GPS/NLTP	

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Victoria Crockford	QLDC Climate and Biodiversity Reference Group	RPTP-0481	Marketing, promotion, engagement	Wants ORC to do more community engagement through educational campaigns, community workshops on route planning and service frequency and clear communication about how public transport supports climate commitments	No changes to RPTP - noting	Improving engagement is a key focus of this Plan as outlined in our Focus area 2. Further information on 'how' is included in the ORC Engagement and Significance policy. Further education and marketing - this is included in our plan in the Branding and Marketing policies and actions on pg26	Improving engagement is a key focus of this Plan as outlined in our Focus area 2. Further information on 'how' is included in the ORC Engagement and Significance policy. Further education and marketing - this is included in our plan in the Branding and Marketing policies and actions on pg26	
Victoria Crockford	QLDC Climate and Biodiversity Reference Group	RPTP-0481	General	Notes that reducing public transport services mean we are undermining climate action goals by increasing reliance on private vehicles	No changes to RPTP - noting	We agree with the submitter's point. Our plan outlines our challenge with rising operating costs, but also highlights that cutting services is a last resort. We are however in a position where we can't expand our network to the extend that we would like.	We agree with the submitter's point. Our plan outlines our challenge with rising operating costs, but also highlights that cutting services is a last resort. We are however in a position where we can't expand our network to the extend that we would like.	
Kayla Stewart		RPTP-0483	Fares base fare	Other suggestions are to introduce fare capping (daily/weekly maximum spend) for frequent users or offer off-peak discounts to encourage use when capacity is underutilised.	No changes to RPTP - base fare decision	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago. Fare capping is included as a fare structure option for future decisions.	
Kayla Stewart		RPTP-0483	Fares base fare	Agree as long as it is financially sustainable. Two compromises could be a small nominal fare e.g.\$0.50 and/or fare capping allowing unlimited travel within a certain period (daily or weekly)	No changes to RPTP - base fare decision	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago. Fare capping is included as a fare structure option for future decisions.	
Kayla Stewart		RPTP-0483	Collaboration with institutions	ORC could work closely with Health NZ to coordinate services. e.g. if medical appointments for people from the same area could be schedule on the same day, transport services could run more efficiently and cost-effectively.	No changes to RPTP	Our plan includes working closely with our key stakeholders. We have set up a quarterly forum with some of these key organisations. The specifics of the submitters request are outside the scope of this plan.	Our plan includes working closely with our key stakeholders. We have set up a quarterly forum with some of these key organisations. The specifics of the submitters request are outside the scope of this plan.	
Kayla Stewart		RPTP-0483	Focus areas	Focus on building a system that works for the communities who rely on it every day — not just the aspirational goals that look good on paper. Keeping costs down for users should be at the heart of the plan	No changes to RPTP - noting	Our users are at the forefront of our minds in developing this plan. Our plan emphasises delivering a convenient and reliable public transport system that improves personal freedom and access to opportunities for all, including keeping fares low and the system sustainable, including for our funders.	Our users are at the forefront of our minds in developing this plan. Our plan emphasises delivering a convenient and reliable public transport system that improves personal freedom and access to opportunities for all, including keeping fares low and the system sustainable, including for our funders.	
Kayla Stewart		RPTP-0483	Focus areas	Concern that the draft plan prioritises environmental sustainability while proposing fare increases. While reducing emissions is important, this approach risks undermine the goal it aims to achieve. Higher fares make public transport less accessible. Focus on affordability and accessibility first, sustainability will follow.	No changes to RPTP - noting	The submitter's point is noted, and we recognise the challenge of balancing our obligations to increase private share without compromising all the positive ground we have made with increased patronage and environmental sustainability. Our modelling suggests the small increase proposed still keeps the fares low and will not marked impact on patronage.	The submitter's point is noted, and we recognise the challenge of balancing our obligations to increase private share without compromising all the positive ground we have made with increased patronage and environmental sustainability. Our modelling suggests the small increase proposed still keeps the fares low and will not marked impact on patronage.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Kayla Stewart		RPTP-0483	Community transport	To ensure long term success, support should be provided to help initiatives establish the necessary organisational structures and legal entity status to enable them to apply for grants	No changes to RPTP - noting	We absolutely agree, and this is the role we see ORC assisting with.	We absolutely agree, and this is the role we see ORC assisting with.	
Kayla Stewart		RPTP-0483	Community transport	A community transport service could improve access to essential services. Access to affordable and reliable transport is a major issue for many people in the district, particularly for those who are elderly, live alone or don't drive.	No changes to RPTP	We agree that community transport has a role in improving transport options in the District, especially for people experiencing transport disadvantage.	We agree that community transport has a role in improving transport options in the District, especially for people experiencing transport disadvantage.	
Kayla Stewart		RPTP-0483	Fares zones	Charging more for longer trips may seem fair in principle, in practice it disproportionately affects those who can least afford it. Housing is cheaper outside the city and land for new housing in the city is limited. People need to live in outer suburbs or nearby towns and public transport should be part of the solution to this housing pressure, not another cost barrier. Flat fares are simple, equitable, and predictable. They encourage more widespread use of public transport.	No changes to RPTP - zone fare decision	We agree to a point however we also support encouraging good urban development principles. Our plan gives importance to land-use considerations which would support focusing PT investment on areas where PT performs well and drives growth/development.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kayla Stewart		RPTP-0483	Fares base fare	25% is too steep. this could deter regular passengers and discourage new users which undermines the financial and environmental goals of public transport. A gradual staged fare increase would allow time to adjust and avoid sudden cost shocks	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Fiona Rissell		RPTP-0484	Accessibility	Total Mobility is absolutely essential to me being able to access my health appointments.	No changes to RPTP	Thank you for your feedback	Thank you for your feedback	
Cheryl Dodds		RPTP-0485	Clutha service	Supports a Balclutha to Dunedin bus	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	A Dunedin to Balclutha service is included as an integral service in the plan and would serve the airport, however we do not currently have funding to make these improvements.	
Cheryl Dodds		RPTP-0485	General	Really enjoys the bus--"so you know you guys are awesome!"	No changes to RPTP	Thank you for your feedback	Thank you for your feedback	
Cheryl Dodds		RPTP-0485	Fares base fare	Opposes adult bee card fare increases as it could increase costs for families who need the most help	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Brett Cunningham		RPTP-0486	Fares concessions	Supports free child fares to encourage public transport use habits in young people.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Brett Cunningham		RPTP-0486	Fares zones	Supports zone fares but would like fare capping for regular users.	No changes to RPTP - zone fare decision	Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones. Fare capping is included as an option for future decisions.	
Brett Cunningham		RPTP-0486	Vehicles electric	Request to decarbonise the bus fleet with trolley buses, not electric battery buses.	No changes to RPTP - noting	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB).	Fleet electrification is mandated by NZTA through the Requirements for Urban Buses (RUB).	
Brett Cunningham		RPTP-0486	Public information	Request to improve readability of head signs	No changes to RPTP	Noted with thanks	Noted with thanks	
Brett Cunningham		RPTP-0486	Fares base fare	Supports a base fare increase but would like it to be paired with service improvements.	No changes to RPTP - base fare decision	Noting link to service provision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Brett Cunningham		RPTP-0486	Frequency	Request to improve 30-minute frequencies to 15-minutes throughout Dunedin.	No changes to RPTP	Our Fares and Frequencies Business Case supports improved frequencies across the network; however we are not currently in a position to fund such improvements	Our Fares and Frequencies Business Case supports improved frequencies across the network; however we are not currently in a position to fund such improvements	
Brett Cunningham		RPTP-0486	Routes	Request to revise Dunedin bus routes into a more concentrated pattern to enable greater mode shift. Full details on requested route changes are attached to the submission.	No changes to RPTP	Thank you -- we will undertake periodic reviews of services. Although some of the ideas presented here may not be viable at present, there are some thoughtful suggestions and some may be seen in future changes.	Thank you -- we will undertake periodic reviews of services. Although some of the ideas presented here may not be viable at present, there are some thoughtful suggestions and some may be seen in future changes.	
Brett Cunningham		RPTP-0486	Rail and ferries	Request to revive historical cable car services (e.g. Maryhill and Kaikorai).	No changes to RPTP	We are not in a position to support this as an integral part of our public transport network. Along with cost, we would have concerns with duplication of existing bus services and accessibility.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Brett Cunningham		RPTP-0486	General	Request for DCC to own PT vehicles and depots, and lease them to competing operators. This would build trust with the community and enable more responsiveness surrounding vehicle and infrastructure asset issues.	No changes to RPTP - noting	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Our plan is focused on further enhancing the collaborative and constructive working relationship that ORC has with territorial authorities. ORC is considering the purchase of land for a depot in Queenstown to reduce a barrier to entry and encourage a competitive market environment	We do not currently have a basis to make such a decision on reallocating responsibilities, but we note that there is some community interest in such changes. Our plan is focused on further enhancing the collaborative and constructive working relationship that ORC has with territorial authorities. ORC is considering the purchase of land for a depot in Queenstown to reduce a barrier to entry and encourage a competitive market environment	
Brett Cunningham		RPTP-0486	Routes	Request to move Dunedin bus hub and central city bus routes to travel along Princes St and (a two-way) George St.	No changes to RPTP	We do not currently have a plan for future central city changes but we acknowledge the interest and the ideas	We do not currently have a plan for future central city changes but we acknowledge the interest and the ideas	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Brett Cunningham		RPTP-0486	Rail and ferries	Request for a Balclutha-Palmerston passenger rail service (via the Dunedin Airport). This would reduce vehicles on SH1 and connect the airport to PT.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Jasmine Grey		RPTP-0487	Fares concessions	Agree with 100% discounts for children as this helps families and takes strain off their finances	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jasmine Grey		RPTP-0487	Focus areas	Good to see improving reliability and frequency of bus services as a focus area as this is key to encouraging people to use them.	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Jasmine Grey		RPTP-0487	Regional services	Agree with including bus services in smaller communities	No changes to RPTP	Thank you	Thank you	
Jasmine Grey		RPTP-0487	Fares base fare	People are struggling and a \$4 round trip can add up quickly for people who rely on public transport.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Jasmine Grey		RPTP-0487	Fares zones	Charging more for longer trips will only encourage people to use their cars instead of public transport .	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sue Scott		RPTP-0488	Fares concessions	Supports free fares for children as it enables better access to healthcare, libraries, supermarkets, schools, etc	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sue Scott		RPTP-0488	Community transport	Supports community transport and thinks a small vehicle between Waikouaiti and Palmerston would be helpful to the community	No changes to RPTP	Noted with thanks	Noted with thanks	
Sue Scott		RPTP-0488	General	Says public transport should be a shared cost service just like parks, hospitals, roads, etc., and low income families will be most impacted by fare increases	No changes to RPTP - noting	Public transport is a shared cost model, please see page 82 of the plan for further information on the funding model and distribution of costs.	Public transport is a shared cost model, please see page 82 of the plan for further information on the funding model and distribution of costs.	
Sue Scott		RPTP-0488	General	Submitter mentions there is not enough affordable housing within 2km of central Dunedin, so access to those places is difficult	No changes to RPTP - noting	Unsure of the submitters exact point. The Dunedin urban bus network extends well outside of central Dunedin and has good levels of coverage and frequency to most locations.	Unsure of the submitters exact point. The Dunedin urban bus network extends well outside of central Dunedin and has good levels of coverage and frequency to most locations.	
Sue Scott		RPTP-0488	Fares base fare	Opposes increase in adult bee card fare because it is a 25% increase, which is a lot for some families	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Craig Cliff	University of Otago	RPTP-0489	Regional services	Interest in potentially collaborating in a South Island passenger rail service for students at certain times of the year	No changes to RPTP	Acknowledge the request -- while outside the scope of the plan we are happy to discuss at an appropriate time.	Acknowledge the request -- while outside the scope of the plan we are happy to discuss at an appropriate time.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Craig Cliff	University of Otago	RPTP-0489	Vehicles electric	Support electric buses	No changes to RPTP	Noted with thanks	Noted with thanks	
Craig Cliff	University of Otago	RPTP-0489	Collaboration with institutions	Support strengthening collaborative working relationships both operationally and in terms of research	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Craig Cliff	University of Otago	RPTP-0489	Routes	Request route changes that are more direct to the university, an airport bus services and regional routes connecting Balclutha and Oamaru with Dunedin	No changes to RPTP	We have no specific response to these requests, but they will be considered in future network planning	We have no specific response to these requests, but they will be considered in future network planning	
Craig Cliff	University of Otago	RPTP-0489	Fares zones	Opposes zone fare structure as it could lead to higher private vehicle use	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ross Palethorpe		RPTP-0490	Oamaru service	Agree, Oamaru needs ORC help with a proper public transport service	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Ross Palethorpe		RPTP-0490	Fares concessions	Agree, free children transport will be positively impact on whanau and young people encourages good habits in public transport	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Ross Palethorpe		RPTP-0490	General	A proper long-term transport plan is essential for building inclusive, efficient, and sustainable communities. By increasing both the use and availability of transport options for everyone	No changes to RPTP	Thank you, we agree	Thank you, we agree	
Ross Palethorpe		RPTP-0490	Regional services	There is a real need for some form of public transport both locally and connecting us to other towns and locales.	No changes to RPTP	We agree and our plan gives increased emphasis to a regional network, although we do not yet have a funding pathway.	We agree and our plan gives increased emphasis to a regional network, although we do not yet have a funding pathway.	
Lichelle Guyan		RPTP-0491	Community transport	Supports community transport, as the Waitaki is in desperate need for transport for the elderly and those unable to drive to hospital appointments	No changes to RPTP	Noted with thanks	Noted with thanks	
Christopher Hawkins		RPTP-0492	Community transport	It would be good to use zero-emission vehicles for community transport services	No changes to RPTP - noting	Agree with the submitters point and is something that will need to be worked through with each of the communities.	Agree with the submitters point and is something that will need to be worked through with each of the communities.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Christopher Hawkins		RPTP-0492	Fares zones	There is not enough information on how much the fares might increase between the zones or how differing zone fares will interact with the current free transfer system. The simplicity of the current system is a real strength. If there has to be an increase, it should be modest e.g. 50c.	No changes to RPTP - zone fare decision	Fares for a zonal structure have not been investigated yet. This work will follow any decision to change our fare structure to a zonal system.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Christopher Hawkins		RPTP-0492	Vehicles electric	Excited about the electrification of the fleet as soon as possible	No changes to RPTP	Noted with thanks	Noted with thanks	
Christopher Hawkins		RPTP-0492	Dunedin Airport service	Support the planned Dunedin Airport zone which could charge higher costs and still remain favourable compared to commercial options or car hire.	No changes to RPTP	Noted with thanks	Noted with thanks	
Christopher Hawkins		RPTP-0492	General	I'm really impressed with what the council has been able to accomplish over the past decade. It's really heartening to see the ORC take on feedback and look to grow into its role as a regional transport body connecting people across the whole of Otago.	No changes to RPTP	Thank you for your feedback	Thank you for your feedback	
Christopher Hawkins		RPTP-0492	Fares base fare	Disagree with increasing Bee Card fares - having a low fares and a simple fare structure has enabled increasing ridership.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Barbara Sloan		RPTP-0493	Funding	Charging for CV use is both ineffective and unfair.	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Barbara Sloan		RPTP-0493	Vehicles electric	A uniform charging system for transport is recommended	No changes to RPTP	This is outside the scope of the RPTP, but thank you for the suggestion, and it is something for further consideration.	This is outside the scope of the RPTP, but thank you for the suggestion, and it is something for further consideration.	
Barbara Sloan		RPTP-0493	General	Should lower the rates/unhappy about the new build	No changes to RPTP	This is outside the scope of the RPTP, but thank you for your feedback	This is outside the scope of the RPTP, but thank you for your feedback	
Barbara Sloan		RPTP-0493	Fares base fare	Adult Bee card fare can increase and should be \$3	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Barbara Sloan		RPTP-0493	Fares zones	Supports charging more on longer trips	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Sarah Burdon	Hawea Community Association	RPTP-0494	Upper Clutha service	Hawea is getting 400 new residential units, and many of these residents may have limited access to private transport	No changes to RPTP - noting	This plan signals intent to improve transport options in our smaller centres. However based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The extensive development in this area does not meet those principles and is a challenge to address.	This plan signals intent to improve transport options in our smaller centres. However based on a desk top study (Otago Community and Accessible Transport study) and a review of the community shuttle trials in 22/23 viable public transport that is affordable to both the user and the community is not feasible without central government co-funding. Current government priorities do not align with funding additional public transport services. Further the RPTP reflects the principles for integrating land use to be able to achieve good affordable public transport. The extensive development in this area does not meet those principles and is a challenge to address.	
Sarah Burdon	Hawea Community Association	RPTP-0494	Community transport	Generally supports community transport, but thinks a volunteer-run model is not sufficient and will not meet the needs of the community as a regular fixed route service would	No changes to RPTP - noting	We agree it may not be a long-term solution in some locations. It does however have a role in paving the way for further understanding the transport needs in our smaller centres and how public transport can best support those in the future if funding becomes available.	We agree it may not be a long-term solution in some locations. It does however have a role in paving the way for further understanding the transport needs in our smaller centres and how public transport can best support those in the future if funding becomes available.	
Sharon Lavery		RPTP-0495	Fares concessions	The 100% discount for children could be raised to 16.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Sharon Lavery		RPTP-0495	Oamaru service	A public transport system is needed in Oamaru. A lot of low socio-economic families have a long walk to the main support networks. Elderly and young parents are important to be involved in community activities and transport is often a barrier in Oamaru.	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service.	Add a local Oamaru service to the integral services in the plan
Sharon Lavery		RPTP-0495	Fares base fare	Disagree with increasing Bee Card fare - to encourage people to use public transport keep it affordable for all	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Colleen Hurd	Otago Central Rail Trail Trust	RPTP-0496	Bikes on buses	Wants more bike carrying capacity on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Colleen Hurd	Otago Central Rail Trail Trust	RPTP-0496	Vehicles electric	Supports electric buses	No changes to RPTP	Noted with thanks	Noted with thanks	
Colleen Hurd	Otago Central Rail Trail Trust	RPTP-0496	Community transport	Supports community transport, particularly in Oamaka, as it could provide safe transport for elderly drivers and build community connectivity	No changes to RPTP	Noted with thanks	Noted with thanks	
Colleen Hurd	Otago Central Rail Trail Trust	RPTP-0496	Operations	Wants tap payment for buses and shielded compartment for drivers	No changes to RPTP - operational	The plan outlines the introduction of Motu Move ticketing system that will allow tap bank card payments. VQ P2 also highlights ORC requirements for driver protection screens.	The plan outlines the introduction of Motu Move ticketing system that will allow tap bank card payments. VQ P2 also highlights ORC requirements for driver protection screens.	
Colleen Hurd	Otago Central Rail Trail Trust	RPTP-0496	Regional services	Requests greater regional connectivity between Alex, Clyde Cromwell and Queenstown	No changes to RPTP	We agree and our plan gives increased emphasis to a regional network, although we do not yet have a funding pathway.	We agree and our plan gives increased emphasis to a regional network, although we do not yet have a funding pathway.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Colleen Hurd	Otago Central Rail Trail Trust	RPTP-0496	Fares zones	Supports zone fare structure as this is something that happens overseas	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Celine Austin		RPTP-0498	Fares concessions	Should remain free for under 12 and minimum fares for youth. Ideally would like both free.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Celine Austin		RPTP-0498	Community transport	Supports community transport as school transport should be free and we should work on linking smaller communities	No changes to RPTP - noting	Note the submitters support for community transport. MOE school services are free, however school services as part of our network are subject to our fare and concession policy.	Note the submitters support for community transport. MOE school services are free, however school services as part of our network are subject to our fare and concession policy.	
Celine Austin		RPTP-0498	Focus areas	Supports building a connected and integrated network, this helps with sustainability, trust and value.	No changes to RPTP	Noted with thanks	Noted with thanks	
Celine Austin		RPTP-0498	Fares base fare	Only up the base fare if we are going to provide a better service.	No changes to RPTP - base fare decision	Noting link to service provision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Celine Austin		RPTP-0498	Fares zones	People often live out of town due to costs, upping fares for longer trips would add financial pressure.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Rachel Elder		RPTP-0499	Fares concessions	Supports free child fares because it is a way to incentivise the younger generation to commute using PT.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Rachel Elder		RPTP-0499	Active transport	Request to implement an active transport plan to improve walking and cycling in the region.	No changes to RPTP	Improving active transport across the region is out side the scope of the plan. However we are working on an Active and Public Transport Connectivity Strategy as outlined in the Plan.	Improving active transport across the region is out side the scope of the plan. However we are working on an Active and Public Transport Connectivity Strategy as outlined in the Plan.	
Rachel Elder		RPTP-0499	Active transport	Request for an active transport connection between Cromwell and Wanaka, Waiholo and Dunedin, Middlemarch and Dunedin, Dunedin and Palmerston, and Dunedin and the Peninsula's Highcliff Road.	No changes to RPTP	Improving active transport across the region is out side the scope of the plan. However we are working on an Active and Public Transport Connectivity Strategy as outlined in the Plan.	Improving active transport across the region is out side the scope of the plan. However we are working on an Active and Public Transport Connectivity Strategy as outlined in the Plan.	
Rachel Elder		RPTP-0499	Vehicles electric	Support for fleet electrification.	No changes to RPTP	Noted with thanks	Noted with thanks	
Rachel Elder		RPTP-0499	Community transport	Supports community transport and requests we consider how it can support walkers and cyclists, e.g. through bike racks.	No changes to RPTP	Noted with thanks	Noted with thanks	
Rachel Elder		RPTP-0499	Bikes on buses	Supports bike racks on buses.	No changes to RPTP - noting	Thank you	Thank you	
Rachel Elder		RPTP-0499	Fares base fare	Opposes a base fare increase to \$2.50 - submitter would rather we focus on improving patronage.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Rachel Elder		RPTP-0499	Fares zones	Supports zone fares but would like fares to remain affordable.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Edmund Clouston-Cain		RPTP-0500	Fares concessions	Opposes retaining free fares for children, because if they take a seat they should pay	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Edmund Clouston-Cain		RPTP-0500	Safety	Felt high school students were being disrespectful on the bus, but was happy ORC added a security guard onto the bus	No changes to RPTP	Noted with thanks	Noted with thanks	
Edmund Clouston-Cain		RPTP-0500	Fares base fare	Conditional support for adult bee card fare increases, if those increases are needed for better bus systems	No changes to RPTP - base fare decision	Noting link to service provision	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Edmund Clouston-Cain		RPTP-0500	Routes	Submitter thinks the bus from Kings to Green Island should have an express bus	No changes to RPTP	The operation of school routes will be considered in future network planning	The operation of school routes will be considered in future network planning	
Leigh Milmine	Te Hā o Maru	RPTP-0501	Oamaru service	Requests Oamaru to Dunedin service to have better access to hospital	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Improving access to health care is a high priority.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Improving access to health care is a high priority.	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Focus areas	Recommend that priority is given to improving the accessibility, inclusivity and safety of all public transport services over the ten-year life of transport plan	No changes to RPTP - noting	Accessibility, safety and inclusivity are all high priorities and we believe we have captured these through each focus area of the Plan	Accessibility, safety and inclusivity are all high priorities and we believe we have captured these through each focus area of the Plan	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Accessibility	Praise ORC for many transport initiatives benefitting disabled people, including \$2 flat fares, moving TM from paper vouchers to cards, adding services to Mosgiel, etc.	No changes to RPTP	Noted with thanks	Noted with thanks	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Accessibility	Supports providing training to all drivers registered with Total Mobility	No changes to RPTP	Noted with thanks	Noted with thanks	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Community transport	Supports community transport and wants it to be adequately funded	No changes to RPTP	Noted with thanks	Noted with thanks	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Accessibility	Wants any major provincial centres not covered by Total Mobility are added to the scheme by Council over the next 10 years and requests information to be in accessible format for all TM users	No changes to RPTP - noting	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Expanding total mobility services relies on availability of approved operators and funding. We support the submitters intent, but can not commit to the 10 year time frame due to funding constraints. We are working to improved the accessibility of our public information..	Our plan includes an increased focus on how we can improve services outside the main urban centres, and we aim to build on this work in the future; subject to co-funding. Expanding total mobility services relies on availability of approved operators and funding. We support the submitters intent, but can not commit to the 10 year time frame due to funding constraints. We are working to improved the accessibility of our public information..	

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Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Accessibility	Raises concerns about safety on the bus for disabled people	No changes to RPTP - noting	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of all passengers and drivers	Public safety is noted as a challenge in section 1.5, and a key priority in Focus Area 1: Passenger Experience and 2.2 Safety. Safety is incorporated in actions throughout the RPTP. We will continue to work to ensure the safety of all passengers and drivers	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Accessibility	Council and the RPTP should recognise that disabled people are disproportionately impacted by climate change	No changes to RPTP	Thank you for raising this very valid point.	Thank you for raising this very valid point.	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Focus areas	Recommend that 'value for money' assessments of transport include the benefits of transport-disadvantaged people	No changes to RPTP - noting	Thank you for the thoughtful feedback. Value for money assessments are very difficult. We try to assess the benefits to all, but are aware of the additional benefits for transport-disadvantaged people.	Thank you for the thoughtful feedback. Value for money assessments are very difficult. We try to assess the benefits to all, but are aware of the additional benefits for transport-disadvantaged people.	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Fares base fare	Reluctantly agrees with increasing fares, but that they should remain frozen for at least two years	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago. Fares will be reviewed annually.	
Chris Ford	Disabled Persons Assembly (DPA) New Zealand	RPTP-0502	Fares zones	Supports re-introducing zones if the fare is an extra 50 cents per zone	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Helen Jansen		RPTP-0503	Oamaru service	Requests an Oamaru to Dunedin bus, citing access to hospital appointments	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Access to health services is a key driver for this. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Access to health services is a key driver for this. Currently this service is planned to be introduced for in the next 10 years.	
Helen Jansen		RPTP-0503	Community transport	Supports community transport but acknowledges the challenge of retaining volunteers	No changes to RPTP	Noted with thanks	Noted with thanks	
Helen Jansen		RPTP-0503	Fares base fare	Thinks a 50c increase in fares is reasonable	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Theresa Goodwin		RPTP-0504	Upper Clutha service	Wanaka is growing and we need to start looking at a reliable bus system to keep up with it.	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Small changes to network maps to indicate priority for Wānaka connection
Stephanie Evans		RPTP-0505	Fares concessions	Agree, with concession fares. This would make it easier for parents to travel with their children and help foster a love for public transport among young passengers.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Stephanie Evans		RPTP-0505	Fares base fare	The socio-economic status of communities in remote regions should be carefully considered before implementing any fare increases. A basic assessment is essential to ensure that fare changes do not disproportionately affect vulnerable populations.	No changes to RPTP - base fare decision	Noted with thanks	No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

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Stephanie Evans		RPTP-0505	Wayfinding	Realtime info screen is a great facility	No changes to RPTP	Noted with thanks	Noted with thanks	
Stephanie Evans		RPTP-0505	Public information	Better signage on buses to help passengers manoeuvre the flippy-downy seats	No changes to RPTP - operational	Noted with thanks	Noted with thanks	
Stephanie Evans		RPTP-0505	General	Not convinced that public transport should be governed solely by a Regional Council	No changes to RPTP - noting	Public transport is not governed solely by the regional Council. Pg 12 of the plan outlines the roles and responsibilities of ORC, as well as our partners. Each Territory Authority and NZTA have a key role in the PT system.	Public transport is not governed solely by the regional Council. Pg 12 of the plan outlines the roles and responsibilities of ORC, as well as our partners. Each Territory Authority and NZTA have a key role in the PT system.	
Stephanie Evans		RPTP-0505	Accessibility	Agree, ORC's approach towards public transport is greatly appreciated. The service has an important place for elderly and disabled users	No changes to RPTP	Thank you	Thank you	
Stephanie Evans		RPTP-0505	Regional services	Encourage ORC to work with intercity or other providers to continue to review the needs of passengers travel between regional centres. There is room for development specifically in CODC and QLDC	No changes to RPTP	We agree and our plan gives increased emphasis to a regional network, although we do not yet have a funding pathway.	We agree and our plan gives increased emphasis to a regional network, although we do not yet have a funding pathway.	
Stephanie Evans		RPTP-0505	Fares base fare	Agree, An increase in Bee Card fares is supported if it helps retain a universal flat fare structure.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Stephanie Evans		RPTP-0505	Fares zones	Disagree with zone fares. This can significantly impact certain communities, particularly lower-income groups, who rely on public transport for long-distance travel.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Keely Mcleod		RPTP-0506	Fares zones	Opposes zone fare structure because it could be more confusing compared with the flat fare	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
David Solomon		RPTP-0507	Fares concessions	1 - 16 year olds should get a 50% discount.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
David Solomon		RPTP-0507	Fares concessions	Disagree with 100% discounts for children - if they take up a seat they should be charged.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
David Solomon		RPTP-0507	Focus areas	Forget about passenger experience and building trust, if you operate a good business, these will develop naturally.	No changes to RPTP	Noted with thanks	Noted with thanks	
David Solomon		RPTP-0507	Fares local/tourists	Stop subsidising cruise ship passengers.	No changes to RPTP - base fare decision	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	Noting public transport is for the public, and we want to avoid discriminating between users. Determining who is considered a tourist is also difficult.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
David Solomon		RPTP-0507	Rail and ferries	ORC doesn't subsidise the water taxis so they should not be in the public transport sector at all	No changes to RPTP	ORC does subsidise the Queenstown Ferry.	ORC does subsidise the Queenstown Ferry.	
David Solomon		RPTP-0507	Funding	Increase the fares and reduce ORC rates. Sell the bus business back to local operations and let the free market prevail. Remove ORC from the business.	No changes to RPTP - noting	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	Our plan outlines the funding model for public transport and how we all benefit from it, including non-users. A fully user pays model would not be able to provide the service levels of a public transport system, or be affordable for users. Public transport needs to be accessible and affordable to all.	
David Solomon		RPTP-0507	General	Analyse passenger numbers and reduce/increase service based on occupied seats per route.	No changes to RPTP - noting	Thank you for your suggestion. Our integrated and connected network section (Focus area 4) outlines are service design principles and the importance of full frequencies across long service hours	Thank you for your suggestion. Our integrated and connected network section (Focus area 4) outlines are service design principles and the importance of full frequencies across long service hours	
David Solomon		RPTP-0507	Vehicles smaller	Match bus size to passenger numbers.	Change to RPTP	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	While it is important to ensure buses are not too large, it is also important that there is sufficient capacity for peak trips.	Add explainer on small buses in Focus area 4.
David Solomon		RPTP-0507	Fares base fare	Increase the Bee Card fares to reflect the cost of operations. Stop subsidising a failing business.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
David Solomon		RPTP-0507	Fares zones	Agree with charging more for longer trips - The longer the distance, the higher the cost, therefore the higher the fare.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
David Solomon		RPTP-0507	Fares base fare	Discount off-peak fares and introduce an all-day pass for off-peak times	No changes to RPTP - base fare decision		Change from Draft Plan: off-peak fares added as an additional option for decisions on fare structure.	
Louise Maxwell		RPTP-0509	Fares base fare	Opposes raising fares for adult bee card because it could affect poorest people most	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Niamh Tasker		RPTP-0510	Fares concessions	Consider a tertiary concession which may entice more students to take the bus to university. Wellington has one, Dunedin needs one.	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Niamh Tasker		RPTP-0510	Dunedin Airport service	Supports expanding into the airport zone.	No changes to RPTP	Noted with thanks	Noted with thanks	
Niamh Tasker		RPTP-0510	Fares zones	Fares should be increased if you are travelling down the peninsula or to Mosgiel, but Dunedin fares should stay the same.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Barbara Anderson		RPTP-0511	Community transport	Pleased with the role that ORC plays in supporting community transport services.	No changes to RPTP	Noted with thanks	Noted with thanks	
Barbara Anderson		RPTP-0511	Focus areas	The current wording doesn't quite capture the intent	No changes to RPTP - noting	The submitter's point is unclear.	The submitter's point is unclear.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Barbara Anderson		RPTP-0511	Rail and ferries	Introducing commuter train services between Oamaru and Dunedin would be a great idea, especially since the rail infrastructure is already in place	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Barbara Anderson		RPTP-0511	Events	Request for better arrangement during the Cruise Ship season by Port Otago to help ease the strain on the local bus system.	No changes to RPTP - operational	We would closely with the Port to coordinate the demand from cruise ships so it eases the strain on the local system.	We would closely with the Port to coordinate the demand from cruise ships so it eases the strain on the local system.	
Jinty MacTavish		RPTP-0512	Fares concessions	Supports extending free fares for youth 13-18 years old	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jinty MacTavish		RPTP-0512	Frequency	Submitter thinks there should be more reliable services to and from key after school/weekend activity hubs, such as Edgar Centre and Logan Park	No changes to RPTP	Our plan supports giving priority to such key activity centres.	Our plan supports giving priority to such key activity centres.	
Jinty MacTavish		RPTP-0512	Fares base fare	Submitter acknowledges that ORC has made a lot of improvements in recent years, but thinks raising the adult Bee card fare and moving to a zone fare structure would undo that	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Melinda Maxwell		RPTP-0513	Fares base fare	Opposes base fare increase, the cheap fares make it easier to get around and are preferable to driving therefore less congestion and emissions.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Donna Peacock		RPTP-0514	Fares concessions	Agree with proposed concession fares - encourage younger generation to use public transport	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Donna Peacock		RPTP-0514	Fares concessions	Opposes youth discount in favour of free youth fares	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Donna Peacock		RPTP-0514	Fares concessions	Free fare during 9 am-3pm for senior Community Card holders	No changes to RPTP - noting	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Pg 86 of the plan contains an explanation for why we don't support free public transport.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Donna Peacock		RPTP-0514	Rail and ferries	Rail transport need to be included	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Donna Peacock		RPTP-0514	General	A potential survey to gather information on public transport usage as commuter traffic continues to increase rapidly.	No changes to RPTP - noting	Reviewing data and gathering evidence to support our network design and timetabling is part of our business as usual. We also draw on wider surveying like the Household Travel Survey and census data to understand travel patterns.	Reviewing data and gathering evidence to support our network design and timetabling is part of our business as usual. We also draw on wider surveying like the Household Travel Survey and census data to understand travel patterns.	
Donna Peacock		RPTP-0514	Rail and ferries	Consider implementing integrated bus and rail transport between Dunedin, Mosgiel, and Port Chalmers as a strategy to reduce congestion and pollution.	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes

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Shannon Hodson		RPTP-0515	Fares zones	Opposes zone fare structure as they think it will cost children more to get to school	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Emily Cooper		RPTP-0516	Timetables	Put on a Friday night bus to Palmerston, even if this means taking a Saturday trip away to fund it.	No changes to RPTP	We will be renewing our contract for this service and considering what changes to make.	We will be renewing our contract for this service and considering what changes to make.	
R Neil Peacock		RPTP-0517	Fares concessions	Free bus service for "less well-off" during 9.00am to 3.00pm	No changes to RPTP - noting	Pg 86 of the plan contains an explanation for why we don't support free public transport. Defining specific user groups and ability to pay is tricky. We support a low fare for all.	Pg 86 of the plan contains an explanation for why we don't support free public transport. Defining specific user groups and ability to pay is tricky. We support a low fare for all.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
R Neil Peacock		RPTP-0517	Rail and ferries	Train services should be prioritized considering the increased fuel costs and the future availability of energy sources	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
R Neil Peacock		RPTP-0517	Rail and ferries	Integration with Rail	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail, but we acknowledge that there is community support to look for alternative ways to connect the wider region.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Garry Patrick		RPTP-0518	Fares concessions	Supports retaining free fares for children as it will be more affordable for families	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Garry Patrick		RPTP-0518	Bus drivers	Generally likes the bus drivers, though thinks some could be more friendly	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Garry Patrick		RPTP-0518	Bus stop infrastructure	Many bus stops have a massive drop and elderly people have a difficult time getting off	No changes to RPTP - operational	Thank you for raising this point, we will forward it to our operations team	Thank you for raising this point, we will forward it to our operations team	
Garry Patrick		RPTP-0518	Operations	Wants more bus service on Balmacewen Road between Grater St and Rosebank Ave. There are 3 stops in Drivers road that are 450m distance, but the stops in Balmacewen Rd between Māori Hill and Rosebank Ave are 990m between stops	No changes to RPTP - follow up action	Thanks -- the point is being forwarded to our Implementation team	Thanks -- the point is being forwarded to our Implementation team	
Garry Patrick		RPTP-0518	Fares base fare	Supports increase in adult bee card fares, and thinks fares should be reviewed to reflect operating costs	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago and will be reviewed annually.	

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Mat Woods	Destination Queenstown and Lake Wānaka Tourism	RPTP-0519	Focus areas	Supports the focus areas but wants more reference to gondolas, mass rapid transport and water ferries	No changes to RPTP - noting	Focus Area 4 of our plan (A connected and integrated network) outlines how we design our network and services. We take a mode-neutral approach and where bus is the most cost effective way of meeting needs currently, we also acknowledge the importance of being adaptable in the modes we support in response to changing community needs and technological advancements. We are supportive of mass rapid transit if the land use development supports it.	Focus Area 4 of our plan (A connected and integrated network) outlines how we design our network and services. We take a mode-neutral approach and where bus is the most cost effective way of meeting needs currently, we also acknowledge the importance of being adaptable in the modes we support in response to changing community needs and technological advancements. We are supportive of mass rapid transit if the land use development supports it.	
Mat Woods	Destination Queenstown and Lake Wānaka Tourism	RPTP-0519	Ticketing system	Supports Motu Move but wants Queenstown to be prioritised quickly, as it is a tourism destination	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Mat Woods	Destination Queenstown and Lake Wānaka Tourism	RPTP-0519	Community transport	Opposes community transport because they say it is not sufficient, particularly for Upper Clutha	No changes to RPTP - noting	We agree it may not be a long-term solution in some locations. It does however have a role in paving the way for further understanding the transport needs in our smaller centres and how public transport can best support those.	We agree it may not be a long-term solution in some locations. It does however have a role in paving the way for further understanding the transport needs in our smaller centres and how public transport can best support those.	
Mat Woods	Destination Queenstown and Lake Wānaka Tourism	RPTP-0519	Fares zones	Oppose zone fare structure citing issues of equity and zones being too complicated	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Jett Groshinski	Otago University Student's Association	RPTP-0520	Fares concessions	Wants student concession with fare capping of \$4 per day and \$20 per week	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jett Groshinski	Otago University Student's Association	RPTP-0520	Fares concessions	Requests free fares in some windows during the semester to help students get introduced to the buses	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Jett Groshinski	Otago University Student's Association	RPTP-0520	Collaboration with institutions	Requests working closely with OUSA on a Tertiary Precinct Planning Group to examine fare-change trials and pilot routes	No changes to RPTP - follow up action	Noted with thanks	Noted with thanks	
Jett Groshinski	Otago University Student's Association	RPTP-0520	Frequency	Submitter wants 15-minute frequencies where demand is highest, including 10 minute frequencies on Route 15 during peak hours	No changes to RPTP	Our Fares and Frequencies Business Case supports improved frequencies across the network; however we are not currently in a position to fund such improvements	Our Fares and Frequencies Business Case supports improved frequencies across the network; however we are not currently in a position to fund such improvements	
Jett Groshinski	Otago University Student's Association	RPTP-0520	Ticketing system	Requests waiving the card-issuing fee for Motu Move cards	No changes to RPTP - operational	Out of scope for this plan	Out of scope for this plan	
Jett Groshinski	Otago University Student's Association	RPTP-0520	Bus stop infrastructure	Requests installing more lighting and better bus stop infrastructure at five high-use stops near halls of residence	No changes to RPTP - operational	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions. We will pass this on the operations team	Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions. We will pass this on the operations team	
Jett Groshinski	Otago University Student's Association	RPTP-0520	Timetables	Submitter wants later evening services to 'match the real rhythm' of a tertiary city	No changes to RPTP	We agree with the principle -- our target service levels include late service hours.	We agree with the principle -- our target service levels include late service hours.	

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Jett Groshinski	Otago University Student's Association	RPTP-0520	Routes	Requests late night loop service on Thursday, Friday and Saturday from 1030pm-3am	No changes to RPTP	We do not currently have any plans to introduce overnight services in our networks.	We do not currently have any plans to introduce overnight services in our networks.	
Jett Groshinski	Otago University Student's Association	RPTP-0520	Fares base fare	Wants flat \$2 fare until at least 2027	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Neroli Cottam		RPTP-0521	Oamaru service	Wants a Oamaru to Dunedin bus	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years.	
Todd Valster	Rail and Maritime Transport Union	RPTP-0522	Rail and ferries	Wants passenger rail to be featured in the plan due to several reasons, including tourism purposes, public support, resiliency, employment opportunities	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Todd Valster	Rail and Maritime Transport Union	RPTP-0522	Rail and ferries	Submitter lists multiple benefits of passenger rail and cites the inclusion of rail as a mode in the Canterbury RPTP	No changes to RPTP - noting	Rail is not considered a viable mode to meet public transport needs currently. We acknowledge the community's interest in rail solutions.	We acknowledge community interest in rail solutions. We do not currently have an evidence base to include rail in our plan in any great detail, but we have made minor changes to language from the Draft Plan to reflect sentiment and support study in this area	Various small wording changes
Sue McKane		RPTP-0523	Fares base fare	Rather a fare increase than adoption of a 'zoning' system	No changes to RPTP - base fare decision	Note link to zone structure	No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Sue McKane		RPTP-0523	Bus stop infrastructure	Agree, a well functioning public transport facility is important for socio-economic wellbeing	No changes to RPTP	Thank you	Thank you	
Juliet Bruce		RPTP-0524	Focus areas	Submitter supports accessibility as a focus area for people who are not able bodied or find getting around challenging	No changes to RPTP	Noted with thanks	Noted with thanks	
Juliet Bruce		RPTP-0524	Frequency	Submitter wants more frequent services in Queenstown	No changes to RPTP	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	Our Queenstown Public Transport Business Case includes improved frequency and capacity improvements to the Queenstown network and this is represented in the plan.	
Alex Macmillan	Cosy Homes Charitable Trust/ Otago Housing Alliance	RPTP-0525	General	Support for the plan's emphasis on equity-first approach to decision-making.	No changes to RPTP - noting	Noted with thanks	Noted with thanks	
Alex Macmillan	Cosy Homes Charitable Trust/ Otago Housing Alliance	RPTP-0525	General	Supports the plan's emphasis on promoting dense, mixed-use development that supports walking, cycling, and public transport access.	No changes to RPTP - noting	Noted with thanks	Noted with thanks	
Alex Macmillan	Cosy Homes Charitable Trust/ Otago Housing Alliance	RPTP-0525	Accessibility	Request to not eliminate cash because it contradicts our commitment to prioritising equity in our decision-making.	No changes to RPTP - noting	Thank you for raising this very valid point. Whilst the ability to pay via a bank card will significantly reduce the need for cash, we recognise that this present a challenge for some. We are working on solutions with the Motu Move card, and will update the public when we have more information.	Thank you for raising this very valid point. Whilst the ability to pay via a bank card will significantly reduce the need for cash, we recognise that this present a challenge for some. We are working on solutions with the Motu Move card, and will update the public when we have more information.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Alex Macmillan	Cosy Homes Charitable Trust/ Otago Housing Alliance	RPTP-0525	Collaboration with institutions	Request that advocating for transport-oriented planning to be supported by adequate staffing and resourcing, enabling proactive collaboration with developers, community housing providers and territorial authorities	No changes to RPTP	Thank you for your feedback. We agree with the submitters point.	Thank you for your feedback. We agree with the submitters point.	
Alex Macmillan	Cosy Homes Charitable Trust/ Otago Housing Alliance	RPTP-0525	General	Request to add housing affordability and accessibility to the urban form factors listed in Appendix E. Including housing affordability as a specific consideration would ensure that equity is embedded in decisions.	No changes to RPTP - noting	We acknowledge the point however, the factors listed in this table are the urban form factors that influence the viability of good public transport and a well functioning urban environment that can be well serviced with PT to increase access. Affordability and accessibility are considered outcomes as opposed to principles.	We acknowledge the point however, the factors listed in this table are the urban form factors that influence the viability of good public transport and a well functioning urban environment that can be well serviced with PT to increase access. Affordability and accessibility are considered outcomes as opposed to principles.	
Alex Macmillan	Cosy Homes Charitable Trust/ Otago Housing Alliance	RPTP-0525	General	Request to amend LU P2 to allow for flexibility where equity considerations justify service provision to developments that may not meet all urban form criteria. This would acknowledge historical development patterns in Otago: affordable housing is often built on the urban periphery, where land is cheapest, but where density is lower and access to services is more limited.	No changes to RPTP - noting	We acknowledge the submitter's point however LU P2 is a key positive step forward to make sure land use decisions align with principles for well functioning environments. Historical development decisions make it hard and expensive to provide a good level of public transport. We will continue to work with these communities to pursue public transport solutions.	We acknowledge the submitter's point however LU P2 is a key positive step forward to make sure land use decisions align with principles for well functioning environments. Historical development decisions make it hard and expensive to provide a good level of public transport. We will continue to work with these communities to pursue public transport solutions.	
Juliet Eckford		RPTP-0526	Fares concessions	Free bus fare should be expanded to the age of year 18	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Juliet Eckford		RPTP-0526	Fares zones	Agree, but no adequate information in how these are implemented/goals will be achieved	No changes to RPTP - zone fare decision	Fares for a zonal structure have not been investigated yet. This work will follow any decision to change our fare structure to a zonal system.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Juliet Eckford		RPTP-0526	Routes	Request for Quail Rise bus to be better connected to Queenstown or Arrowtown, or better timed with the Queenstown and Arrowtown buses.	No changes to RPTP	Noted. More changes in this area are possible as service levels improve, but we do not currently have a specific plan.	Noted. More changes in this area are possible as service levels improve, but we do not currently have a specific plan.	
Juliet Eckford		RPTP-0526	Bus priority	Traffic management priorities for Wakatipu	No changes to RPTP	These concerns are shared by many and contribute to our plan for Queenstown.	These concerns are shared by many and contribute to our plan for Queenstown.	
Juliet Eckford		RPTP-0526	Fares zones	charge more inter-regional travel	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Juliet Eckford		RPTP-0526	Fares zones	A flat fare within QT	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Mary O'Brien	CCS Disability Action	RPTP-0527	Fares base fare	Submitter supports free transfers and fare capping	No changes to RPTP	Noted thank you. Fare capping is included as a potential element of our fare structure in Fare policy F P2 pg. 84. The current low fares mean multiple trips are affordable. Additionally fare capping does not currently align with NZTA directive to increase private share.	No change from Draft Plan. Free transfers will continue and fare capping is included as a fare-structure option, for later decision.	
Mary O'Brien	CCS Disability Action	RPTP-0527	Focus areas	Submitter mentions they support all the focus areas, but on the form they ticked 'no' on whether they support	No changes to RPTP	Noted that the submitters view is unclear	Noted that the submitters view is unclear	
Mary O'Brien	CCS Disability Action	RPTP-0527	Community transport	Submitter supports community transport and policies CT P1 and CT P2. They recommend ORC develop a funding mechanism to support rural transport providers	No changes to RPTP	Noted with thanks	Noted with thanks	
Mary O'Brien	CCS Disability Action	RPTP-0527	Fares concessions	Submitter supports maintaining free fares for children, but wants to extend free fares to youth, Community Service Card holders and Super Gold	No changes to RPTP - noting	Pg 86 of the plan contains an explanation for why we don't support free public transport. We support a low fare for all rather than discriminating by some level of criteria.	Pg 86 of the plan contains an explanation for why we don't support free public transport. We support a low fare for all rather than discriminating by some level of criteria.	
Mary O'Brien	CCS Disability Action	RPTP-0527	Ticketing system	Submitter opposes eliminating cash use, as Community Service Card and Super Gold Card holders are less likely to have access to a smart phone and use the bank card payment system	No changes to RPTP - noting	Thank you for raising this very valid point. Whilst the ability to pay via a bank card will significantly reduce the need for cash, we recognise that this present a challenge for some. We are working on solutions with the Motu Move card, and will update the public when we have more information.	Thank you for raising this very valid point. Whilst the ability to pay via a bank card will significantly reduce the need for cash, we recognise that this present a challenge for some. We are working on solutions with the Motu Move card, and will update the public when we have more information.	
Mary O'Brien	CCS Disability Action	RPTP-0527	Fares zones	Opposes moving to zone fare structure as it could be a barrier to transport disadvantaged people who live in areas further away where housing is cheaper	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Kate Coffey		RPTP-0528	School services	Supports community transport if it will help with getting kids to and from school, especially from places like out on the peninsula where the bus is often full.	No changes to RPTP - noting	Community transport will not fit the needs of school transport, However, we will be renewing our contract for this service and considering what changes to make. We agree that peak capacity is a major concern in this area.	Community transport will not fit the needs of school transport, However, we will be renewing our contract for this service and considering what changes to make. We agree that peak capacity is a major concern in this area.	
Ciara Coffey		RPTP-0529	School services	There needs to be a better school bus service for kids on the Otago Peninsula	No changes to RPTP - noting	We will be renewing our contract for this service and considering what changes to make. We agree that peak capacity is a major concern in this area.	We will be renewing our contract for this service and considering what changes to make. We agree that peak capacity is a major concern in this area.	
Ashling Coffey		RPTP-0530	Capacity	Submitter says peninsula buses are extremely full	No changes to RPTP - noting	Route capacity will continue to be a consideration in our design of routes and timetables.	Route capacity will continue to be a consideration in our design of routes and timetables.	
Ashling Coffey		RPTP-0530	Fares base fare	Opposes increase to adult Bee card fares because it may disincentivise bus use	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Ashling Coffey		RPTP-0530	Fares zones	Opposes the zone fare structure because they live on the peninsula and think charging more for longer distances will make it cheaper to drive	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Elspeth Moody		RPTP-0531	Fares concessions	Keep 100% discounts for children. It would be great to see parents and children catching the bus together rather than driving.	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Elspeth Moody		RPTP-0531	Focus areas	All the objectives are necessary to deliver a service that provides environmental sustainability.	No changes to RPTP	Noted with thanks	Noted with thanks	
Elspeth Moody		RPTP-0531	Routes	Warrington is a growing suburb of Dunedin and has an inadequate bus service. The evening bus service does not take passengers back to Warrington but to Evansdale, meaning a 2km walk to get home. The timetable has few buses running that most other routes and they are regularly not on time. Dedicated public transport users are desperate not to have this service canned but it will be grossly unfair if we end up paying a premium to do so. People will just stop taking the bus.	No changes to RPTP	Services in the area will be reviewed as part of the process of renewing the contract. We caution that financial resources will be limited and we will not be able to meet all needs as well as we would like, but we share the aspirations.	Services in the area will be reviewed as part of the process of renewing the contract. We caution that financial resources will be limited and we will not be able to meet all needs as well as we would like, but we share the aspirations.	
Elspeth Moody		RPTP-0531	Frequency	Some recognition that bus services are paid for in part by ratepayers and fare paying adults so I would like to see the 1C bus from Warrington service working people and not just run during term times and have an evening service. Also an early morning service to get people to work on time.	No changes to RPTP	The point is noted and the operations of services in this area will be reviewed with the implementation of a new contract	The point is noted and the operations of services in this area will be reviewed with the implementation of a new contract	
Elspeth Moody		RPTP-0531	Fares concessions	Agree with discounts for youth. It is good to build good public transport using habits early	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Elspeth Moody		RPTP-0531	Fares base fare	An increase to \$2.50 would be manageable for most people.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Annisa Rahmalia		RPTP-0532	Bikes on buses	The buses need to have cycle racks	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Annisa Rahmalia		RPTP-0532	Active transport	Having more bicycle paths would be great.	No changes to RPTP	Out of scope for this plan	Out of scope for this plan	
Annisa Rahmalia		RPTP-0532	Fares concessions	Discounts for youth should be kept as long as it makes financial sense and is sustainable.	No changes to RPTP - noting	Youth concession value decision	There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Annisa Rahmalia		RPTP-0532	Fares base fare	Can concessions be considered for those who could not afford an increase in fares?	No changes to RPTP - base fare decision		No change from Draft Plan. Concessions are available for Community Service cardholders and under-18s.	
Annisa Rahmalia		RPTP-0532	Fares zones	As long as the zones are reasonably decided, it makes sense to charge for longer trips.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Arjan Abeynaike		RPTP-0533	Vehicles electric	Supports the transition to electric vehicles	No changes to RPTP	Noted with thanks	Noted with thanks	
Arjan Abeynaike		RPTP-0533	Ticketing system	Submitter says the Bee card swiping on buses often does not work	No changes to RPTP - operational	Noted, thank you. We will pass this on to our operations team	Noted, thank you. We will pass this on to our operations team	
Arjan Abeynaike		RPTP-0533	Frequency	Wants more frequent services in the evenings, particularly the 77 to Mosgiel	No changes to RPTP	The target service levels in our Plan are consistent with this request.	The target service levels in our Plan are consistent with this request.	
Arjan Abeynaike		RPTP-0533	Fares base fare	Not happy about it but does agree it makes sense to up the base fare.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Arjan Abeynaike		RPTP-0533	Fares zones	No increase for longer journeys, unless for waged workers maybe.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Tim Locker		RPTP-0534	Safety	Buses that travel on the open road should have seatbelts. If an accident happened at 100 kph, the damage to passengers could be catastrophic.	No changes to RPTP - noting	Thank you for your valid point. All buses must comply with the Requirements of Urban Buses (RUB). This sets out the standards for buses. Additionally seat belts are not required by law in NZ.	Thank you for your valid point. All buses must comply with the Requirements of Urban Buses (RUB). This sets out the standards for buses. Additionally seat belts are not required by law in NZ.	
Tim Locker		RPTP-0534	Frequency	The Blueskin area should be included in the goal to enhance networks through new services. The bus from Warrington does not get me to town for 8am and the 8.10 arrival time at the bus hub rarely happens. The timing has become increasing unreliable. A bus that got workers to town by 7.15 is also needed	No changes to RPTP - noting	The point is noted and the operations of services in this area will be reviewed with the implementation of a new contract	The point is noted and the operations of services in this area will be reviewed with the implementation of a new contract	
Tim Locker		RPTP-0534	Fares base fare	The proposed increase of the Bee Card fare would still be very good value from Warrington to Dunedin.	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Tim Locker		RPTP-0534	Fares zones	Do not agree with charging more for longer trips as there is a need to reduce congestion on the road, emissions and parking problems in the city.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Michelle Wilkie		RPTP-0535	Fares concessions	Good to have child and youth discount as an encouragement for using public transport more	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%

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Michelle Wilkie		RPTP-0535	General	Very happy with the current operations of the bus services and the bus fares. Also pleased with the initiatives being taken to encourage the use of public transport.	No changes to RPTP - noting	Noted with thanks	Noted with thanks	
Michelle Wilkie		RPTP-0535	Ticketing system	Bee Card is a great option, affordable, and encouraging way of using public transport	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Michelle Wilkie		RPTP-0535	Fares zones	Happy with the current flat fare arrangement for longer trips; it still encourages the use of public transport.	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Robert Van Turnhout		RPTP-0536	Fares concessions	Supports maintaining free child fares as having 2-3 kids it saves them a lot of money	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Robert Van Turnhout		RPTP-0536	Operations	Says the Palmerston bus is always late, leaving people to wait outside. Also it is crowded so people are standing up while the bus goes very far and fast	No changes to RPTP	Thank you -- we agree that there are some challenges on this route and will be looking to make some changes in the upcoming contract renewal	Thank you -- we agree that there are some challenges on this route and will be looking to make some changes in the upcoming contract renewal	
Robert Van Turnhout		RPTP-0536	Fares base fare	Opposes increase to adult bee card fares and move to zone fare structure because many people are unable to pay	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago, and a shift towards zonal fares is supported. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
NOT PROVIDED NOT PROVIDED		RPTP-0538	Fares concessions	Agree with the discount for children fare, as long term encouragement for younger generation to use public transport	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
NOT PROVIDED NOT PROVIDED		RPTP-0538	Focus areas	Agree, The 'focus area' captures Otago's public transport priorities	No changes to RPTP	Noted with thanks	Noted with thanks	
NOT PROVIDED NOT PROVIDED		RPTP-0538	Community transport	Agree with the current role of ORC's in supporting community transport service, specially with the aging population	No changes to RPTP	Noted with thanks	Noted with thanks	
NOT PROVIDED NOT PROVIDED		RPTP-0538	General	Having a long-term goal or plan for the public transport sector would be useful for understanding behavioural changes in the choice of public transport	No changes to RPTP - noting	Noted with thanks	Noted with thanks	
NOT PROVIDED NOT PROVIDED		RPTP-0538	General	Appreciates Improved bus information, improved frequency and simplified bus fare	No changes to RPTP - noting	Noted with thanks	Noted with thanks	

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NOT PROVIDED NOT PROVIDED		RPTP-0538	General	A potential household survey to assess the weekly or monthly costs associated with public transport.	No changes to RPTP - noting	This is outside the scope of the Plan. A national household travel survey is conducted by the Ministry of Transport	This is outside the scope of the Plan. A national household travel survey is conducted by the Ministry of Transport	
NOT PROVIDED NOT PROVIDED		RPTP-0538	Fares zones	A flat fare for longer trips	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Rail and ferries	pg. 64, 6-30 years: Didn't the ORC PT Business case discount a ferry to Homestead Bay?	Change to RPTP	Accept	Accept	Remove Homestead Bay leg from 6-30 year map. We don't currently have a case for this.
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Customer service	pg. 24, 2.3, CS A4: Support the policy but suggest the inclusion of the words "(of NZTA standard)" are superfluous (the survey is a requirement of the NZTA Procurement Manual) and may limit Council undertaking a more comprehensive survey.	Change to RPTP	Accept the submitters point	Accept the submitters point	Remove (of NZTA standard) from CS A4
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 27, 2.6, Case study: Use of the phrase "financially viable for ORC" suggests that the fare revenue generated covers the costs of the additional services. If not, remove the reference.	Change to RPTP	Accept the submitters point to remove the last six words of this case study text.	Accept the submitters point to remove the last six words of this case study text.	pg27 Case study. Change last paragraph to read: 'The success of our cruise ship-targeted services highlights the potential for special event travel to bring positive social outcomes to the community.'
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Bikes on buses	pg. 23, 2.3, Footnote 3: Delete the second sentence as this issue has been resolved.	Change to RPTP	Agree	Agree	Remove reference to temporary restriction of bike racks on buses.
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Bikes on buses	pg. 32, 2.7, VQ P2: Note that some of the 'additional' stuff is already in the RUB - e.g. bike racks and driver screens, so not additional per se. On bike racks, would also recommend adherence to latest NZTA industry alerts.	No changes to RPTP - noting	Agree however it is useful to have this available to the public who are not so familiar with RUB. We believe that there is no need to spell out adherence to latest NZTA industry alerts. This is inherent in all our work practices.	Agree however it is useful to have this available to the public who are not so familiar with RUB. We believe that there is no need to spell out adherence to latest NZTA industry alerts. This is inherent in all our work practices.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Bus drivers	pg. 22, 2.2: Emphasise the importance of driver safety and working conditions, including how ORC may want to use driver fund to support driver safety and working conditions.	Change to RPTP	Agree there is value in adding driver working conditions to the last bullet point on the first column of pg. 22	Agree there is value in adding driver working conditions to the last bullet point on the first column of pg. 22	Pg22 2.2 amend last bullet point of first column to read "collaboration with service operators to ensure the highest standard of passenger and driver safety, and driver working conditions"
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 82, Figure 13: Replace "Grants" with "NLTF/Crown". This will be more transparent and make it clear to the reader where the funding actually comes from.	Change to RPTP	Agree with changing the label on figure 13 from Grants to NLTF/Crown Funding.	Agree with changing the label on figure 13 from Grants to NLTF/Crown Funding.	Figure 13 Pg 82. Change the label 'Grants' to 'NLTF/Crown'

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Active transport	pg. 71, MM A4: Given policy MM A3, why is it Council's role to provide cycle parking (which has historically been a TA/RCA role)? Surely the provision of cycle parking is addressed by the previous policy.	Change to RPTP	Agree with submitter's point that MM A4 is a duplication with A3	The submitter's point is acknowledged, however ORC has a role in advocating and identifying opportunities for the provision of cycle infrastructure to improve the intregation of cycling with PT. Wording of MM A 4 amended to 'Advocate and identify opportunities for provision of cycle parking at strategic locations to support greater access to the public transport network by cycling'	Amend wording of MM A4 to: 'Advocate and identify opportunities for provision of cycle parking at strategic locations to support greater access to the public transport network by cycling'
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 12, 1.4: This section should be amended to reflect the following (especially that NZTA has a role to oversee PT nationally and how significant NZTA's investment is): The NZTA is required to contribute to an efficient, effective and safe land transport system in the public interest (section 95 (1) (a), Land Transport Management Act 2003 [LTMA]). Our functions include: •overseeing the planning, operation, implementation, and delivery of public transport (including issuing guidelines for regional public transport plans; section 95 (1) (i), LTMA); and •managing funding of the land transport system (section 95 (1) (j), LTMA). In this regard, NZTA is the largest single investor in public transport in Otago alongside its partner Council; ORC. In the 2024/27 period, ORC will rate its community \$58.2m to invest in public transport and in partnership, NZTA will co-invest about \$60m.	Change to RPTP	Agree with the submitters point to expand the role of NZTA in Section 1.4. The submitters second point is adequately covered in the funding section of the Plan.	Agree with the submitters point to expand the role of NZTA in Section 1.4. The submitters second point is adequately covered in the funding section of the Plan.	Change last paragraph of text on pg. 12 to 'At a national level, NZTA shapes the transport system through strategic frameworks and the GPS. They also oversee the planning, operation, implementation, and delivery of public transport (including issuing guidelines for regional public transport plans and managing funding of the land transport system'..
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	n/a	pg. 40, 3.1, Equity principle 3: Is disinvestment the correct word as opposed to "under-investment" or "a lack of investment"? Disinvestment suggests there has been a withdrawal or reduction of an investment (which isn't the case).	Change to RPTP	Agree with the submitters point. Change the third principle on pg. 40 to 'Address lack of under-investment'	Agree with the submitters point. Change the third principle on pg. 40 to 'Address lack of under-investment'	Pg 40. Change the third principle to 'Address lack of under-investment'
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Collaboration with institutions	pg. 43, 3.3: Given academic institutions are mentioned, there should be an action here to explore opportunities for commercial sponsorship of fares for staff and students to boost third party revenue.	No changes to RPTP - noting	Agree, and this action is captured later in the Value for Money section FS A3 pg. 83	Agree, and this action is captured later in the Value for Money section FS A3 pg. 83	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Collaboration with institutions	pg. 44, Partner agencies: In recent years, ORC, DCC and NZTA have successfully collaborated to deliver significant improvements around Dunedin, such as Mosgiel Express services and improved Mosgiel peak services.	Change to RPTP	Agree. Add NZTA and additional point to pg. 44 Partner Agencies section.	Agree. Add NZTA and additional point to pg. 44 Partner Agencies section.	Amend pg. 44 first column last bullet point to: In recent years, ORC, DCC and NZTA have successfully collaborated.... Add bullet ' Mosgiel Express services and improved Mosgiel peak services'
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Regional services	pg. 60, 10-30 years: Suggest remove "speculative" and replace with "(subject to funding and further study)". The services shown for "Next 10 years" are as speculative as what is shown for 10-30 years and/or Dunedin and Queenstown.	No changes to RPTP	Although we acknowledge the point that anything unfunded is speculative from a funders' perspective, the next-10-year network consists of services that have already seen approval of local share and has a evidence base in the Community and Accessible Transport Study. We are comfortable with the framing.	Although we acknowledge the point that anything unfunded is speculative from a funders' perspective, the next-10-year network consists of services that have already seen approval of local share and has a evidence base in the Community and Accessible Transport Study. We are comfortable with the framing.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Vehicles electric	pg. 47, 4.2: Air quality improvement is cited as a reason for decarbonisation. Is there evidence that shows air quality from public transport vehicles is a problem in Dunedin and/or Queenstown?	No changes to RPTP	An investigation of this nature is outside the scope of the RPTP	An investigation of this nature is outside the scope of the RPTP	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Active transport	p.71 - Multi-Modal access: It might be useful to call out specifically the goal of improving first and final leg facilities and connections to and from PT.	No changes to RPTP - noting	As a document designed for a range of readers, we feel 'first and last mile' is a bit jargony, opting to include this concept in MM P 1 with the point "safe and accessibility walking, cycling and micro-mobility connections to public transport services and facilities.	As a document designed for a range of readers, we feel 'first and last mile' is a bit jargony, opting to include this concept in MM P 1 with the point "safe and accessibility walking, cycling and micro-mobility connections to public transport services and facilities.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Bus drivers	pg. 30, 2.7, SQ A4: Link this policy back to driver fund; will ORC avail of this to improve driver safety, e.g. live CCTV?	No changes to RPTP - noting	CCTV is captured in this policy already. Adds no value to specify the driver fund.	CCTV is captured in this policy already. Adds no value to specify the driver fund.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 83, 6.1, Funding actions: Will ORC work with DCC to remove current District Plan / by-law restrictions on bus shelter advertising? And then establish some revenue sharing model?	No changes to RPTP - noting	Changes to the District Plan are outside the scope of this Plan, however FS A3 captures ORCs intent to work with our partner agencies and other stakeholders to increase private revenue sources.	Changes to the District Plan are outside the scope of this Plan, however FS A3 captures ORCs intent to work with our partner agencies and other stakeholders to increase private revenue sources.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Fares concessions	pg. 85, 6.2, F P3: Oppose 100% concession for 5-12 years	No changes to RPTP - noting	Child concession value decision	Change in Final Plan: There will be a 40% concession on full adult fares for 5-18 year olds in Dunedin and Queenstown.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Events	pg. 28, 2.6, SE A2: Do not support providing public financial assistance to support events. Major events should be paying ORC to put on extra event services, or paying ORC so that eventgoers get free PT, not the other way around.	No changes to RPTP - noting	Each event request is considered individually and ORC need to balance the needs and wider community benefits of public transport provision. This policy notes the condition of funding being available.	Each event request is considered individually and ORC need to balance the needs and wider community benefits of public transport provision. This policy notes the condition of funding being available.	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Oamaru service	pg. 41, 3.1, Case study: It is correct that in the 2024/27 NLTP round, NZTA did not approve co-investment to support a trial bus service within Ōamaru. However, that does not prevent ORC funding the full cost through 100% local share and the rationale for why it doesn't should be included.	No changes to RPTP - noting	NLTP Funding for a trial service in Ōamaru was declined in the 2024/2027, and Council voted to not proceed with 100% ORC funding, rather use targeted rates to investigate options for connecting Ōamaru to the Dunedin network.	NLTP Funding for a trial service in Ōamaru was declined in the 2024/2027, and Council voted to not proceed with 100% ORC funding, rather use targeted rates to investigate options for connecting Ōamaru to the Dunedin network.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Bus drivers	pg. 89, 6.4, WS P2: Note that there's also the wage buffer requirement in the new indexation requirements from NZTA.	No changes to RPTP - noting	Noted thank you.	Noted thank you.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Events	pg. 28, 2.6, SE A1: Fully support. A good way of increasing third-party revenue.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	General comment: The Plan is looking really good. Well done to all involved in its development.	No changes to RPTP - noting	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 21, 2.1, PI A7: Fully support.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 24, 2.3, CS A1: Fully support.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	Pg 46, LU A1: Support the policy.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	Pg 46, LU A2: Support the policy.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Vehicles electric	pg. 48, DC P1: Support Council trying to achieve a 100% decarbonised fleet by 2035 (in alignment with the existing govt aspirational target), but it should ensure that functional diesel buses are not retired prematurely as there will be embedded carbon costs from their premature scrapping.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Vehicles electric	pg. 48, DC A1: As above.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 53, 5.2: This is a great use of the NZTA network descriptors.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Fares base fare	pg. 85, 6.2, F P6: Fully support annual fare level reviews, including base fare level being adjusted with inflation.	No changes to RPTP - base fare decision	Noted with thanks	Noted with thanks	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Fares base fare	pg. 85, 6.2, F P6: Good to see the RPTP providing sound reasoning for not implementing free fares. It should also be noted that NZTA does not support free fares.	No changes to RPTP - base fare decision	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 88, 6.3, PA A1: Council to note that a transition may require some approvals from NZTA where the transition will be contrary to the Procurement Manual rules, etc.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 93, table 10: Fully support the transparency on service KPIs in contracts and ORC being transparent that abatements will apply where issues are within operators control.	No changes to RPTP	Noted with thanks	Noted with thanks	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Collaboration with institutions	pg. 42, 3.2: Fully support the aspiration especially given NZTA's statutory roles to oversee the planning, operation, implementation, and delivery of public transport and managing funding of the land transport system. As noted in the cover letter, NZTA is the largest single investor in public transport in Otago so that open and honest dialogue between each can only assist in ensuring public transport decisions are informed.	No changes to RPTP	Noted with thanks.	Noted with thanks.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Collaboration with institutions	pg. 43, 3.3: As above.	No changes to RPTP	Noted with thanks.	Noted with thanks.	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	<p>pg. 52, SD P4: This policy may not meet the requirements of the RPTP Guidelines which state: "Where a PTA provides, or intends to provide, on-demand public transport services, it must include objectives and policies within its regional public transport plan that:</p> <ul style="list-style-type: none">• outline the use cases for which a PTA may deploy on-demand public transport• the accessibility standards that will apply to the scheme and vehicles utilised within the scheme• signal how on-demand public transport schemes may be adjusted in response to changing customer demand to promote good customer experience. This may include replacing the service or adjusting:<ul style="list-style-type: none">- fares and payment methods- operating catchment- operating mode- hours of operation- eligibility to utilise the service" (section 4.2.8).	Change to RPTP	SD P6 covers our policy on On-Demand services which satisfies the first bullet point. On the second bullet point we will add a point connecting to RUB standards elsewhere in the document. On the third bullet point we will include a point linking these standards to fixed route standards as our strategy is to treat On-Demand and fixed routes on a like for like basis to the extent practical.	SD P6 covers our policy on On-Demand services which satisfies the first bullet point. On the second bullet point we will add a point connecting to RUB standards elsewhere in the document. On the third bullet point we will include a point linking these standards to fixed route standards as our strategy is to treat On-Demand and fixed routes on a like for like basis to the extent practical.	add the following bullet points to SD P6: •On-demand services should be operated with fleet that comply with the Requirements for Urban Buses •Changes to on-demand services are based on the same principles as fixed-route services (see SD P4 above)
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Routes	p 110-111, Appendix G: The table of units (current and future) looks good and provides transparency.	No changes to RPTP	Thank you	Thank you	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Routes	p 123, Appendix H: The table of units looks good and provides transparency.	No changes to RPTP	Thank you	Thank you	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Accessibility	pg. 33, Total Mobility: The RPTP guidelines require the RPTP to "as a minimum ... include policies specifying: • any regional fare caps and their process for review (couldn't see anything about how fare caps will be reviewed) • policy for enabling hoist-equipped vehicles (contained in TM P5) • eligibility requirements for admitting or removing transport providers from participating in the Total Mobility Scheme." (Plan seemed silent on this.)	Change to RPTP	Thank you for raising these points. We suggest addressing them by amending TM P4 Affordability (pg36) to remove the words 'for passengers' so it reads: Affordability: investigate potential barriers to Total Mobility's affordability , including the \$37.50 fare subsidy cap, subject to financial viability and the outcome of the central government's Total Mobility review. Delete Action TM A5 and replace with: 'Review Total Mobility fare subsidies periodically in line with Annual Plan and Long Term Plan processes'. Amend TM P3 to read: Procurement: Total Mobility will be procured in accordance with the NZTA Procurement Manual and ORC's Transport Activities Procurement strategy, and adhering to guidance set out in NZTA 'Total Mobility Scheme: a guide to local authorities, with a focus on access and value for money. Amend TM A1 to read: Take reasonable and actionable measures to ensure operators meet their eligibility and contractual obligations, including comprehensively auditing of vehicles, claims, training and health and safety. Amend TM A2 to read: develop a standardised operator and agency contract procurement process to reduce barriers to entry, promote transparency, and resourcing in a way that serves disabled people with a diverse range of needs while maintaining good value for money.	Thank you for raising these points. We suggest addressing them by amending TM P4 Affordability (pg36) to remove the words 'for passengers' so it reads: Affordability: investigate potential barriers to Total Mobility's affordability , including the \$37.50 fare subsidy cap, subject to financial viability and the outcome of the central government's Total Mobility review. Delete Action TM A5 and replace with: 'Review Total Mobility fare subsidies periodically in line with Annual Plan and Long Term Plan processes'. Amend TM P3 to read: Procurement: Total Mobility will be procured in accordance with the NZTA Procurement Manual and ORC's Transport Activities Procurement strategy, and adhering to guidance set out in NZTA 'Total Mobility Scheme: a guide to local authorities, with a focus on access and value for money. Amend TM A1 to read: Take reasonable and actionable measures to ensure operators meet their eligibility and contractual obligations, including comprehensively auditing of vehicles, claims, training and health and safety. Amend TM A2 to read: develop a standardised operator and agency contract procurement process to reduce barriers to entry, promote transparency, and resourcing in a way that serves disabled people with a diverse range of needs while maintaining good value for money.	remove the words 'for passengers' so it reads: Affordability: investigate potential barriers to Total Mobility's affordability , including the \$37.50 fare subsidy cap, subject to financial viability and the outcome of the central government's Total Mobility review. Delete Action TM A5 and replace with: 'Review Total Mobility fare subsidies periodically in line with Annual Plan and Long Term Plan processes'. Amend TM P3 to read: Procurement: Total Mobility will be procured in accordance with the NZTA Procurement Manual and ORC's Transport Activities Procurement strategy, and adhering to guidance set out in NZTA 'Total Mobility Scheme: a guide to local authorities, with a focus on access and value for money. Amend TM A1 to read: Take reasonable and actionable measures to ensure operators meet their eligibility and contractual obligations, including comprehensively auditing of vehicles, claims, training and health and safety. Amend TM A2 to read: develop a standardised operator and agency contract procurement process to reduce barriers to entry, promote transparency, and resourcing in a way that serves disabled people with a diverse range of needs while maintaining
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 35, 2.8, Examples: The funding splits shown in the examples are wrong, generally over-stating the local share contribution.	Change to RPTP	Thank you for raising this. New graphic with the current splits has been developed.	Thank you for raising this. New graphic with the current splits has been developed.	Update figure 7 with that provided in Sheet 1
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 93, table 10: Patronage and mode share should have more precise (quantifiable) targets to enhance transparency. For example, the current proposed metric could be achieved by an annual boarding increase in Queenstown of a single trip, whereas in the same period the population has increased and when the annual boarding is then converted to trips per capita for example, it will actually equate to a decrease on the year before.	No changes to RPTP - noting	Thank you for the suggestion. Whilst we would like to improve the specify of these KPIs the body of work to support this has not been completed. It is also noted that this level of analysis and reporting would not align with NZTA's data reporting.	Thank you for the suggestion. Whilst we would like to improve the specify of these KPIs the body of work to support this has not been completed. It is also noted that this level of analysis and reporting would not align with NZTA's data reporting.	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Active transport	p. 93: For the mode share indicator, their data source is the census and HTS - it might be worth looking also at the annual Attitudes and Perceptions of Cycling and Walking survey that NZTA releases, as it captures information about Dunedin (although ORC might already be aware of this).	No changes to RPTP - noting	Thank you for this additional reference. The Mode share success measure on Table 10 on pg. 93 relates to public transport mode share only.	Thank you for this additional reference. The Mode share success measure on Table 10 on pg. 93 relates to public transport mode share only.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 32, 2.7, VQ P2: Given the RPTP also prioritises value for money, ORC should be careful that additional requirements beyond the RUB do not detract from Value for Money. I.e. are additional requirements are actually necessary?	No changes to RPTP - noting	Thank you for your feedback	Thank you for your feedback	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 49, 5.1: Fully support ORC's prioritisation of patronage-oriented network.	No changes to RPTP - noting	Thank you for your feedback	Thank you for your feedback	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 93, table 10: Given the focus on fares and Value for money in this RPTP- maybe ORC could consider KPIs related to, among other things: <ul style="list-style-type: none">•average fare•Private share %•Cost per service km?	No changes to RPTP - noting	Thank you for your feedback. These metrics were considered in this table, but we feel these are captured through reporting direct to NZTA and interpreted out of context is not helpful in a public document.	Thank you for your feedback. These metrics were considered in this table, but we feel these are captured through reporting direct to NZTA and interpreted out of context is not helpful in a public document.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 63, 3-6 years: While this section is about network aspirations, the 3-6 year period coincides with contract renewal and the Frankton and Stanley Street PT infrastructure is likely to be in place (and should be mentioned). The Plan also currently reads like the service improvements are more or less incremental when the next contract service uplift in this period is likely to be a significant step up from what is currently provided (and given some more emphasis as that will have significant flow on implications, e.g. increased cost , etc).	No changes to RPTP	Thank you for your feedback. This level of detail sits in the Queenstown Public Business Case which sets out the implementation of Queenstown improvements	Thank you for your feedback. This level of detail sits in the Queenstown Public Business Case which sets out the implementation of Queenstown improvements	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Accessibility	pg. 34, 2.8, Table 2, ORC interpretation: Oppose the interpretation that "steps 2 and 4 will be interpreted in light of a person's ability to board a kneeling bus from ground that is the same height as the ground under the bus." The current ORC interpretation seems to assess the ability of a customer to step up in to a bus (which RUB Requires to have a flat floor), making no allowance that buses have front entry ramps that can be extended to footpaths. It also means anyone in a wheelchair is automatically eligible for TM. The RUB requires vehicles to have sufficient ground clearance to permit the body of the vehicle to pass over a Kassel kerb without making contact with the kerb (these kerbs are 180mm high above the road) and the kneel height at the front door is to be between 245–280mm. At most therefore, a customer would be required to step up 100mm if no ramp was deployed.	Change to RPTP	Thank you for your feedback. The requirements of vehicles under RUB mean that we think an interpretation of the NZTA Eligibility guidance can be removed.	Thank you for your feedback. The requirements of vehicles under RUB mean that we think an interpretation of the NZTA Eligibility guidance can be removed.	Remove last paragraph of text in the General Eligibility box - ORC interpretation pg34
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Public information	pg. 67, Exempt services: The RPTP Guidelines state that "PTAs should make exempt service registers publicly accessible on their website." The register didn't seem to be on Council's website.	No changes to RPTP - follow up action	Thanks for picking this up. We will get the register loaded on to our website	Thanks for picking this up. We will get the register loaded on to our website	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Fares base fare	pg. 126, Passenger fares: The Plan states "this leaves little room for us to increase fares." No evidence is produced to support this claim, especially given operating costs have increased in excess of 20% since the implementation of \$2 fares in the region. Similarly, the comparison of bus trip versus car trip is erroneous given the cost of car parking (which is a real cost to most car commuters), etc, is not included. Delete the section or recraft to remove the bias/inaccuracies.	No changes to RPTP - base fare decision	The comparator costs used are referenced and come from NZTA private share material. With excess of free parking in Dunedin, the parking cost is mute. Additionally our independent modelling supports the statement that we have little room to move before we will lose patronage and revenue.	The comparator costs used are referenced and come from NZTA private share material. With excess of free parking in Dunedin, the parking cost is mute. Additionally our independent modelling supports the statement that we have little room to move before we will lose patronage and revenue.	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 66, 10-30 years: Suggest remove "speculative" and replace with "(subject to funding and further study)". The services shown for "Next 10 years" are as speculative as what is shown for 10-30 years and/or shown for Queenstown.	No changes to RPTP - noting	The difference is that the next 10 year map is based on planned improvements and investigated through the Fares and Frequency business case for Dunedin, where as beyond that the network improvements are just ideas at this stage. For this reason the word speculative is appropriate and signals the difference in level of understanding.	The difference is that the next 10 year map is based on planned improvements and investigated through the Fares and Frequency business case for Dunedin, where as beyond that the network improvements are just ideas at this stage. For this reason the word speculative is appropriate and signals the difference in level of understanding.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 21, 2.1, PI A6: Support providing open access public transport data, but is that at odds with the statement that it is "reasonably priced"?	No changes to RPTP - noting	The submitter's point is noted, however we believe open access to data and being reasonably priced are not at odds in policy PI A6.	The submitter's point is noted, however we believe open access to data and being reasonably priced are not at odds in policy PI A6.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Oamaru service	pg. 41, 3.1, Case study: What is the rationale for to trial a bus service between Oamaru and Dunedin, especially given the centres are currently connected by exempt commercial services?	No changes to RPTP - noting	There is significant demand from the community to have affordable transport options from Oamaru to Dunedin - especially to access health care. Exempt services only run once a day, and it is not possible with existing services to travel from Oamaru to Dunedin and return in the same day. We will be exploring options to complement existing exempt services.	There is significant demand from the community to have affordable transport options from Oamaru to Dunedin - especially to access health care. Exempt services only run once a day, and it is not possible with existing services to travel from Oamaru to Dunedin and return in the same day. We will be exploring options to complement existing exempt services.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Operations	pg. 23, 2.3, CS P3: Is it desirable for skis, snowboards and foldable bikes to be carried on to buses? How will they be safely stored? While the policy says the passenger is responsible, could Council (and operator) as the PCBU be liable in the event of an on-bus mishap?	No changes to RPTP	This is a representation of existing policy and practice as seen on our website "What can be taken on the bus". We have included it in RPTP for completeness in line with the pets policy. We consider that these questions have gone through good processes in the past and we are satisfied that a reasonable and defensible balance has been reached that would protect us and our operators on questions of liability.	This is a representation of existing policy and practice as seen on our website "What can be taken on the bus". We have included it in RPTP for completeness in line with the pets policy. We consider that these questions have gone through good processes in the past and we are satisfied that a reasonable and defensible balance has been reached that would protect us and our operators on questions of liability.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	General feedback on draft: Climate change and resilience are key strategic issues as identified in the introduction, but it's not clear how that feeds through to the proposed actions and policies? There is material on p.101 in Table 11 that says that this RPTP supports resilience by promoting public transport in well-functioning urban environments that are sustainable and resilient in alignment with the Regional Policy Statement but if there's scope, it would be worthwhile discussing how climate change and projected climate risks will impact PT service and design.	No changes to RPTP - noting	This not a requirement of the RPTP in the LTMA or NZTA RPTP Development guidance. PT is resilient in an urban network and the uptake of PT assists with climate adaptation. Additionally climate change and sustainability is not a priority in the GPS	This not a requirement of the RPTP in the LTMA or NZTA RPTP Development guidance. PT is resilient in an urban network and the uptake of PT assists with climate adaptation. Additionally climate change and sustainability is not a priority in the GPS	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	p.106-7, Table 12: Urban form also impacts resilience - maybe this could be mentioned somewhere in this appendix somewhere?	No changes to RPTP - noting	We acknowledge the point however, the factors listed in this table are the urban form factors that influence the viability of good public transport and a well functioning urban environment. Resilience is considered an outcome of these factors, as opposed to a principle.	We acknowledge the point however, the factors listed in this table are the urban form factors that influence the viability of good public transport and a well functioning urban environment. Resilience is considered an outcome of these factors, as opposed to a principle.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 36, 2.8, TM A5: Suggest ORC should look at its fare cap not just from the perspective of it being a barriers, but also how ORC can make the scheme more financially sustainable.	Change to RPTP	We acknowledge the submitter point and suggest amending TM A5 to review fare subsidies and the viability of TM in line with Annual and Long Term planning processes	We acknowledge the submitter point and suggest amending TM A5 to review fare subsidies and the viability of TM in line with Annual and Long Term planning processes	Update TM A5 to 'Review Total Mobility fare subsidies periodically in line with Annual Plan and Long Term Plan processes'
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 38, 2.8, Case study: While the NZTA Innovation Fund helped fund this service start, there was no ongoing operational funding, which meant this service did not last (to the best of our knowledge). This highlights the need for such services to have ongoing volunteer and Council support.	No changes to RPTP - noting	We acknowledge the submitter point however the case study still adds value in highlighting the benefits of community transport to under-served communities.	We acknowledge the submitter point however the case study still adds value in highlighting the benefits of community transport to under-served communities.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	Introduction: It would be helpful to have some information about growth projections and demographic factors that support the policies and actions.	No changes to RPTP - noting	We acknowledge the submitters point however the wider demographics and growth projections sit in the RLTP, as an umbrella strategy to this plan. These are also contained in the Queenstown Public Transport and Dunedin Fares and Frequency businesses cases.	We acknowledge the submitters point however the wider demographics and growth projections sit in the RLTP, as an umbrella strategy to this plan. These are also contained in the Queenstown Public Transport and Dunedin Fares and Frequency businesses cases.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 81, 6.1, Central government funding: The Plan should reference that NZTA is the largest single investor in public transport in Otago. In the 2024/27 period, ORC will rate its community \$58.2m to invest in public transport and land transport planning and in partnership, NZTA will co-invest in excess of \$60m in Otago's public transport.	No changes to RPTP - noting	We acknowledge the submitters point, and we believe our funding section outlines the co-funding and partnership of NZTA and ORC well. Additionally figure 13 provides the reader with an understand of the value of each funding source.	We acknowledge the submitters point, and we believe our funding section outlines the co-funding and partnership of NZTA and ORC well. Additionally figure 13 provides the reader with an understand of the value of each funding source.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	p 124, Appendix I: Given the importance the Government attaches to private share, NZTA submits that ORC's private share targets should be brought up into the main body of the RPTP, e.g. in Section 6, where there's an action to actively increase private share.	No changes to RPTP - noting	We acknowledge the submitters point, however we must also acknowledge the purpose and audiences of this document. There is plenty of reference to the importance of private share in the body of the Plan and the reader is directed to the Appendix for more detail.	We acknowledge the submitters point, however we must also acknowledge the purpose and audiences of this document. There is plenty of reference to the importance of private share in the body of the Plan and the reader is directed to the Appendix for more detail.	

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Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	Funding	pg. 85, 6.2, F P5: Suggest adding another bullet as follows: * understands the NLTP funding implications with respect to whether or not NZTA is agreeable to fund its share. While it's Council's role to determine the fares that apply in its region, it shouldn't assume NZTA is willing to fund a new fare concession. Including the bullet above would provide Council with that clarity.	No changes to RPTP - noting	We acknowledge the submitters point. However believe the point is captured in F P5 already in the bullet point 'The concession aligns with NZTA's fares and pricing policy settings and guidance'. Council is well aware of the NLTP funding implications and makes no assumptions of co-funding. Adding another point would be duplication.	We acknowledge the submitters point. However believe the point is captured in F P5 already in the bullet point 'The concession aligns with NZTA's fares and pricing policy settings and guidance'. Council is well aware of the NLTP funding implications and makes no assumptions of co-funding. Adding another point would be duplication.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 72, 5.4: Great introductory level descriptions of different types of infrastructure but there is insufficient detail about the current and desired future state of infrastructure needed to support services. Compare with ECAN's latest draft RPTP, where there was a useful diagram/maps needed to support planned services of: •Future bus lanes •Depot locations •Bus layover facilities, etc.	No changes to RPTP - noting	We acknowledge the submitters point. We would also like to be able to provide more detail however see we do not have the quality of information or understanding to do this. It would be misleading to give this level of detail without the planning and business case to support it. In comparison, Ecan has their PT futures body of work to draw on.	We acknowledge the submitters point. We would also like to be able to provide more detail however see we do not have the quality of information or understanding to do this. It would be misleading to give this level of detail without the planning and business case to support it. In comparison, Ecan has their PT futures body of work to draw on.	
Ian Duncan	New Zealand Transport Agency Waka Kotahi	RPTP-0539	General	pg. 36, 2.8, TM A4: Instead of ORC paying assessment agencies to retain their services, can agencies be encouraged to charge applicants an assessment fee?	No changes to RPTP - noting	We don't believe this is possible. The TM system follows a prescribed model and an additional fee might further but these already transport disadvantaged people at greater risk.	We don't believe this is possible. The TM system follows a prescribed model and an additional fee might further but these already transport disadvantaged people at greater risk.	
Alasdair Morrison	Waikouaiti Coast Community Board	RPTP-0540	Collaboration with institutions	Requests working more closely with community boards to improve public transport services, including timetabling, while taking into account local demographics	No changes to RPTP - follow up action	Noted with thanks	Noted with thanks	
Alasdair Morrison	Waikouaiti Coast Community Board	RPTP-0540	General	Requesting access to recent patronage figures to better understand public transport usage in the North Coast area	No changes to RPTP - noting	This is outside the scope of the plan. The submitter is welcome to contact ORC directly to determine the information required.	This is outside the scope of the plan. The submitter is welcome to contact ORC directly to determine the information required.	
Alasdair Morrison	Waikouaiti Coast Community Board	RPTP-0540	Frequency	Requests increase in frequency of buses to North Coast and have them be closer to frequency as the Dunedin South Coast and Otago Peninsula	No changes to RPTP	With regards to frequency improvements in this area, we would note that there are competing desires for connections to Oamaru which could compete for resources with shorter-distance frequency improvements. We note the point of comparison with Brighton / Peninsula service; while there may be differences, it will be important for us to benchmark service levels in different areas -- along with other potential regional services such as Balclutha and Oamaru.	With regards to frequency improvements in this area, we would note that there are competing desires for connections to Oamaru which could compete for resources with shorter-distance frequency improvements. We note the point of comparison with Brighton / Peninsula service; while there may be differences, it will be important for us to benchmark service levels in different areas -- along with other potential regional services such as Balclutha and Oamaru.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Alasdair Morrison	Waikouaiti Coast Community Board	RPTP-0540	Fares base fare	Support an increase in adult bee card fare as it may be necessary to have a well-functioning public transport service that is financially sustainable	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Alasdair Morrison	Waikouaiti Coast Community Board	RPTP-0540	Fares zones	Opposes zone fare structure as it could undo patronage increases	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.52 Mode neutrality: public transport will be delivered using the most appropriate mode (e.g. bus, ferry, tram, ropeway, etc.) to meet demand, purpose, community need and value for money	Change to RPTP	Accept -- it is fair to represent this mode given the interest in Queenstown. Phrasing as cable/rope technologies is preferred to be more neutral on the exact technology, however.	Accept -- it is fair to represent this mode given the interest in Queenstown. Phrasing as cable/rope technologies is preferred to be more neutral on the exact technology, however.	Add "cable/rope technologies" to examples of alternative modes in SD P5
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p. 62-64 QT network aspirations: add bullet points "Whoosh aerial ropeway pilot track established at Remarkables Park" and "Adapt existing bus routes to align with new roading patterns e.g. to use the new road connection between Hanleys Farm and Jacks Point"	No changes to RPTP	Aerial ropeway -- this is not in our current plans which come from the Business Case. Changes to bus routes -- this will happen but would be an unnecessary detail in the RPTP	Aerial ropeway -- this is not in our current plans which come from the Business Case. Changes to bus routes -- this will happen but would be an unnecessary detail in the RPTP	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p. 69 Under NF A4 add a bullet point: "Working with proponents of alternative transport modes and technologies"	No changes to RPTP	As this is an implementation point and we do not currently have such changes in our plans, it is not appropriate to include this. We would certainly include such a point if work on alternative modes were to develop further.	As this is an implementation point and we do not currently have such changes in our plans, it is not appropriate to include this. We would certainly include such a point if work on alternative modes were to develop further.	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.52 Consider other ways of delivering the service, including other modes	No changes to RPTP	It is agreed that alternative modes are an example of "other ways of delivering the service" but do not see that this needs to be said explicitly. In the case of low-performing services the alternative modes would be most likely to be on-demand or community transport and we think the policy works as it is.	It is agreed that alternative modes are an example of "other ways of delivering the service" but do not see that this needs to be said explicitly. In the case of low-performing services the alternative modes would be most likely to be on-demand or community transport and we think the policy works as it is.	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	General	p.17: Proactively support good land use policy through integration with public transport design while taking into account alternative transport modes and new transport technology	No changes to RPTP	Noted with thanks	Noted with thanks	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Bus stop infrastructure	Wants more reference to bus shelters in highly used key locations in QLDC area, such as outside Whakatipu High School and Red Oaks drive	No changes to RPTP - operational	The strategic nature of this plan prevents reference to specific stops. Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	The strategic nature of this plan prevents reference to specific stops. Stop infrastructure is guided by the One Network Framework and outlined in section 5.4. Shelter is important and we are committed to working with our TAs to provide bus shelters at well-used stops across the network, acknowledging the local context and restrictions.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.42 Engage in open and regular dialogue with our partner agencies and key stakeholders to align expectations, identify and address inefficiencies and new transport opportunities and optimise the operation of our services	Change to RPTP	This is a reasonable request and we support rephrasing along these lines	This is a reasonable request and we support rephrasing along these lines	Rephrase to slightly shortened version of submitter request: "Engage in open and regular dialogue with our partner agencies and key stakeholders to align expectations, identify and address inefficiencies and opportunities, and optimise the operation of our services."
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.71 MM P2 Tourism: encourage sustainable economic growth and promotion of green tourism based around public and active transport and alternative transport modes.	No changes to RPTP	We accept an interest in *alternative modes of public transport* but the phrasing here refers to *alternative modes of transport* that would not be public (or active) transport. This is out of scope. We are satisfied that the submitter's interest in alternative ways to deliver public transport would be fully covered by existing phrasing.	We accept an interest in *alternative modes of public transport* but the phrasing here refers to *alternative modes of transport* that would not be public (or active) transport. This is out of scope. We are satisfied that the submitter's interest in alternative ways to deliver public transport would be fully covered by existing phrasing.	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.51 add "utilise the most appropriate mode and technology" under SD P1	No changes to RPTP	We agree with the sentiment but are satisfied that SD P5 (Mode neutrality) expresses this principle. Repeating it would be duplication; we prefer to have this principle stand alone to emphasise its importance.	We agree with the sentiment but are satisfied that SD P5 (Mode neutrality) expresses this principle. Repeating it would be duplication; we prefer to have this principle stand alone to emphasise its importance.	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.42 Engage in meaningful dialogue with diverse stakeholders interested in public transport to understand the transport needs and aspirations of the users and the capabilities of those developing new transport technology	Change to RPTP	We agree with the sentiment expressed and the submitter's interest in the matter. We prefer not to draw specific attention to one type of stakeholder in this action as such requests could easily lead to unbalanced policies and actions Follow-up suggestion was submitted in response to the above with the more modest suggestion of adding "and aspirations and advances in technology" . Recommend adding "and aspirations" part.	We agree with the sentiment expressed and the submitter's interest in the matter. We prefer not to draw specific attention to one type of stakeholder in this action as such requests could easily lead to unbalanced policies and actions Follow-up suggestion was submitted in response to the above with the more modest suggestion of adding "and aspirations and advances in technology" . Recommend adding "and aspirations" part.	Amend "with their needs and interests" to "with their needs, interests, and aspirations" in E P1.
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.44 ORC can collaborate with local communities and organisations, including developers of new transport technology, in conjunction with our territorial authorities to support community-led projects that improve public transport infrastructure and capacity	No changes to RPTP	We agree with the sentiment expressed and the submitter's interest in the matter. We prefer not to draw specific attention to one type of stakeholder in this action as such requests could easily lead to unbalanced policies and actions	We agree with the sentiment expressed and the submitter's interest in the matter. We prefer not to draw specific attention to one type of stakeholder in this action as such requests could easily lead to unbalanced policies and actions	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p. 62-64 QT network aspirations: add bullet points "Extension of ferry service to Kawarau River, connecting to Remarkables Park, Shotover Country and Lake Hayes Estate" and "Aerial ropeway service introduced and operating on a Frankton network linking Remarkables Park, Queenstown Airport and the BP transport hub."	No changes to RPTP	We do not have a current basis to include these in our plans.	We do not have a current basis to include these in our plans.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p. 62-64 QT network aspirations: add bullet points "Regular ferry service connecting terminals on the Kawarau River, at Remarkables Park, Shotover Country and Lake Hayes Estate, to Queenstown Bay" and "Aerial ropeway system extended along Frankton Road connecting through the Frankton network to the southern and eastern corridors."	No changes to RPTP	We do not have a current basis to include these in our plans.	We do not have a current basis to include these in our plans.	
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541	Rail and ferries	p.62-64 QT network aspirations: Additionally, there may be a future study of the case for other modes to service this area, including an off-line aerial ropeway option and a direct ferry service.	No changes to RPTP	While we acknowledge the particular proposal that is being promoted and that the specific technology may receive some emphasis in places, a more generic phrasing of "offline solution" emphasises the function over the technical detail, which is appropriate from a mode-neutrality perspective	While we acknowledge the particular proposal that is being promoted and that the specific technology may receive some emphasis in places, a more generic phrasing of "offline solution" emphasises the function over the technical detail, which is appropriate from a mode-neutrality perspective	
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Fares concessions	Supports retaining free fares for everyone under 18	No changes to RPTP - noting	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Funding	Request ORC reframe rates increases as improved opportunities to boost investment in public transport	No changes to RPTP	Noted with thanks	Noted with thanks	
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Community transport	Supports community transport, but wants more public transport services in the Upper Clutha area more generally	No changes to RPTP	Noted with thanks. Our plan also includes working to improve regional connectivity	Noted with thanks. Our plan also includes working to improve regional connectivity	
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Focus areas	Opposes the focus areas on the grounds that they don't go far enough to achieving 40% mode shift goals in Queenstown	No changes to RPTP - noting	The Queenstown Public Transport Business Case programmeme, is a suite of interventions to work towards improved public transport in Queenstown. The first improvements will be beginning in July. We agree there are a lot of challenges with delivering public transport in Queenstown, and our intent is to progress with these over time and as funding permits.	The Queenstown Public Transport Business Case programmeme, is a suite of interventions to work towards improved public transport in Queenstown. The first improvements will be beginning in July. We agree there are a lot of challenges with delivering public transport in Queenstown, and our intent is to progress with these over time and as funding permits.	
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Collaboration with institutions	Request ORC works with central government towards a different GPS that supports mode shift	No changes to RPTP - noting	This is outside the scope of the plan	This is outside the scope of the plan	
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Active transport	Wants ORC to enable first and last mile solutions by working with Tas, and wants bus stops within a 10 minute walk of public transport services	No changes to RPTP - noting	We have a good working relationship with our TAs and collectively are working to improve first and last mile connections. Unfortunately this is not a priority in the GPS so funding is constrained. Our network design section talks about access to stops based on walk distances/time relative to topography.	We have a good working relationship with our TAs and collectively are working to improve first and last mile connections. Unfortunately this is not a priority in the GPS so funding is constrained. Our network design section talks about access to stops based on walk distances/time relative to topography.	
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Fares base fare	Supports increasing adult bee card fares, but wants to keep fares low	No changes to RPTP - base fare decision		No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Amanda Robinson	The Lightfoot Initiative	RPTP-0542	Fares zones	Supports introducing zones, and may even need to consider using dynamic pricing to ensure an equitable approach is used	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Dale Jenkins		RPTP-0543	Routes	Would like the Mosgiel bus to turn into South Road, Caversham, then along David Street and into Hillside Road. This would mean that passengers would not have to transfer to another route to get to Pak n Save or the Warehouse. The return route to Mosgiel should follow this route too.	No changes to RPTP	The Mosgiel route will operate via South Dunedin (although not Caversham) from July. We will review how the service performs under these changes	The Mosgiel route will operate via South Dunedin (although not Caversham) from July. We will review how the service performs under these changes	
Jacqui Eggleton	CCS Disability Action - Local Advisory Committee - Waitaki	RPTP-0544	Oamaru service	Wants a regular bus service from Waitaki to Dunedin, including a Dunedin hospital shuttle service working with St. John	No changes to RPTP - noting	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Improving access to health care is a high priority.	A Dunedin to Oamaru service is included in this Plan as an integral service for Otago, but availability of funding will dictate timing of such improvements. Currently this service is planned to be introduced for in the next 10 years. Improving access to health care is a high priority.	
Jacqui Eggleton	CCS Disability Action - Local Advisory Committee - Waitaki	RPTP-0544	Accessibility	Supports ongoing Total Mobility services, as it plays a critical role in helping the disabled community access opportunities	No changes to RPTP	Noted with thanks	Noted with thanks	
Jacqui Eggleton	CCS Disability Action - Local Advisory Committee - Waitaki	RPTP-0544	Oamaru service	Requests an on-demand service within Oamaru, rather than a fixed route service as this is better for disabled people	No changes to RPTP - noting	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service. We acknowledge the interest in On-demand services	This is supported and considered as a future integral service with the plan, noting that funding is not currently available for such a service. We acknowledge the interest in On-demand services	Add a local Oamaru service to the integral services in the plan.
Janet Pribble		RPTP-0545	Bikes on buses	Wants bike racks back on buses	No changes to RPTP - operational	A solution has been reached and bike racks are now available again.	A solution has been reached and bike racks are now available again.	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Fares base fare	Recommends changes to fares should be consulted on separately to the draft RPTP to better understand the effects of fare changes on patronage	No changes to RPTP - base fare decision	During 19 February 2025 Council meeting, Council approved for the increase in Bee card fare and child concession values to be consulted on as part of the RPTP.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Rail and ferries	Opposes the removal of planned ferry service improvements in the ORC Annual Plan	No changes to RPTP	Ferry service improvements remain in our long-term programme through the Business Case and we acknowledge community interest.	Ferry service improvements remain in our long-term programme through the Business Case and we acknowledge community interest.	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Bus stop infrastructure	For MM A4, recommend a more proactive approach for infrastructure rather than waiting for evidence of demand	No changes to RPTP - noting	Noted thank you. MM A4 to be removed as duplication with MM A3, which adequately covers this area.	Noted thank you. MM A4 to be removed as duplication with MM A3, which adequately covers this area.	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Collaboration with institutions	Mentions that the urban form factors in Appendix E align with the Te Putahi Ladies Mile development Masterplan	No changes to RPTP	Noted with thanks	Noted with thanks	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Community transport	Supports community transport, but acknowledges that some places like Wanaka are growing and it might not be the best solution there	No changes to RPTP	Noted with thanks. Yes we also acknowledge that is may not be a long term solution for Wanaka. Our plan does include working to improve regional connectivity, with particular focus on connecting the Upper Clutha area.	Noted with thanks. Yes we also acknowledge that is may not be a long term solution for Wanaka. Our plan does include working to improve regional connectivity, with particular focus on connecting the Upper Clutha area.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	School services	QLDC requests to be more involved with ORC and Ministry of Education in ongoing discussions on the planned changes to school bus routes	No changes to RPTP - follow up action	Noted, and we will pass on to MOE.	Noted, and we will pass on to MOE.	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Fares base fare	Supports increase in adult bee card fare, but only on the provision that other alternative ways to increase private share are explored. If fares are to increase, make them minimal	No changes to RPTP - base fare decision	Our funding policy FS A3 pg. 83 states our intent to work with our partners and other stakeholders to increase private revenue sources and alternative ways of funding PT.	No change from Draft Plan. The base adult fare will be \$2.50 across Otago.	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Focus areas	Supports the focus areas and objectives, but thinks more attention needs to be paid to frequency and reliability of the network	No changes to RPTP - noting	Reliability is of high importance, and captured in our design principles in focus area 4 of the plan. The plan also emphasises achieving greater frequencies over time, however this is not possible due to current funding constraints.	Reliability is of high importance, and captured in our design principles in focus area 4 of the plan. The plan also emphasises achieving greater frequencies over time, however this is not possible due to current funding constraints.	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Marketing, promotion, engagement	Wants ORC to work more closely with the Wanaka Upper Clutha Community Board to bring public transport services, while acknowledging the role of land use planning in establishing an efficient public transport system	No changes to RPTP - follow up action	Thank you for your submission. Public transport links between Wānaka and Queenstown are outlined in the plan for improving regional connectivity, however currently sit in the 10-30 year horizon due to lack of funding and alignment with central government priorities. Servicing Wanaka and the wider Upper Clutha area is more challenging g given the land use development. Based on a desk top study (Otago Community and Accessible Transport Study) and a review of the 22/23 trial, viable public transport is not affordable to the user or the community without co-funding. We will work closely with the Wanaka Upper Clutha Community Board to look for solutions.	Based on feedback we are giving greater priority to Wanaka in our indicative maps; however we do not yet have funding or an evidence base to support this investment so we caution that this is currently indicative.	Minor changes to future network maps
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Bikes on buses	Recommends the inclusion and consideration of the means to carry bicycles and micro mobility on all scheduled services as clear actions, which will help with mode shift	No changes to RPTP - noting	This point is captured in VQ P2 Vehicle standards and ORC requirements on pg32	This point is captured in VQ P2 Vehicle standards and ORC requirements on pg32	
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Collaboration with institutions	Wants more information about time of use charging in Queenstown, and to outline what a proactive approach to meeting the increased demands related to the implementation of time of use charging might look like	No changes to RPTP - noting	Time of use charging legislation, policy and procedures are in their infancy in NZ. The Plan includes a funding action FS A2 on page 83 that states we will 'Collaborate with our partner agencies to coordinate and align parking strategies and other travel-demand management tools to improve the value of public transport and achieve wider regional carbon-reduction and mode-shift outcomes.'. Time of use charging is considered a travel-demand management tool.	Time of use charging legislation, policy and procedures are in their infancy in NZ. The Plan includes a funding action FS A2 on page 83 that states we will 'Collaborate with our partner agencies to coordinate and align parking strategies and other travel-demand management tools to improve the value of public transport and achieve wider regional carbon-reduction and mode-shift outcomes.'. Amend to include specific reference to 'time of use charging' .	Amend FS A2 wording to: 'Collaborate with our partner agencies to coordinate and align parking strategies, time-of-use charging and other travel demand management tools to improve the value of public transport and achieve wider regional carbon-reduction and mode-shift outcomes'.
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Community transport	Requests a definition of what a 'smaller town' is with respect to community transport	No changes to RPTP	We are using a broad definition of small town to mean any areas outside of our main urban networks and integral services in the context of community transport.	We are using a broad definition of small town to mean any areas outside of our main urban networks and integral services in the context of community transport.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Councillor Gavin Bartlett	Queenstown-Lakes District Council	RPTP-0546	Fares zones	Opposes a zone fare structure in Queenstown as it risks discouraging the uptake of public transport in outer zone communities, particularly Arrowtown	No changes to RPTP - zone fare decision		No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
James Meffan	Ministry of Education	RPTP-0547	School services	QT network aspirations p.62-63: The Ministry (of Education) recommends increasing capacity at peak or school times to high-growth suburbs in Lake Hayes. This may be through provision of additional targeted services or increasing frequency of existing services	No changes to RPTP	Acknowledged -- we will continue to work on this.	Acknowledged -- we will continue to work on this.	
James Meffan	Ministry of Education	RPTP-0547	Routes	QLDC requests to be more involved with ORC and Ministry of Education in ongoing discussions on the planned changes to school bus routes.	No changes to RPTP	Noted -- thank you	Noted -- thank you	
James Meffan	Ministry of Education	RPTP-0547	Focus areas	The Ministry supports the overall vision and objectives within this plan, including specific measures to provide additional services and capacity for school students	No changes to RPTP	Noted -- thank you	Noted -- thank you	
James Meffan	Ministry of Education	RPTP-0547	School services	The Ministry of Education appreciates ORC's steps to providing additional school services as they have pulled services	No changes to RPTP	Noted with thanks	Noted with thanks	
James Meffan	Ministry of Education	RPTP-0547	School services	Targeted services p. 58: We support the proposal to enhance connector and high-frequency services to serve schools without targeted services and to offer targeted services for students where there is demand that cannot be met through core public transport services	No changes to RPTP	Noted with thanks	Noted with thanks	
James Meffan	Ministry of Education	RPTP-0547	School services	Integral/Exempt service p. 69: supports services targeted at school travel should be designed to support travel to students' nearest available school	No changes to RPTP	Noted with thanks	Noted with thanks	
James Meffan	Ministry of Education	RPTP-0547	Funding	Supports the proposal to continue public transport improvements without NZTA or other central government funding on a trial basis	No changes to RPTP	Noted with thanks	Noted with thanks	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Carolyn Guytonbeck		RPTP-0548	Fares zones	Request for more information on zone fares, such as price. Supports zone fares subject to longer trips' fares remaining affordable.	No changes to RPTP - zone fare decision	Fares for a zonal structure have not been investigated yet. This work will follow any decision to change our fare structure to a zonal system.	No change to the Draft Plan. Zonal fares are supported in the Plan, with final details to be developed. The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.	
Alex King		RPTP-0549	General	Praise for the work ORC have done over the years in enhancing the bus service and growing patronage over recent years.	No changes to RPTP	Noted with thanks	Noted with thanks	
Alex King		RPTP-0549	Focus areas	Request for the climate crisis to be a key driver for Otago transport policy.	No changes to RPTP - noting	The climate crisis is a key driver this RPTP and transport policy as noted in the Challenges and opportunities section of the plan on pg 16. Additionally this RPTP elevates the climate emergency with our Focus Area 3 Envrionmental sustainabiity. The RPTP also sits alongside ORCs Climate strategy 2024..	The climate crisis is a key driver this RPTP and transport policy as noted in the Challenges and opportunities section of the plan on pg 16. Additionally this RPTP elevates the climate emergency with our Focus Area 3 Envrionmental sustainabiity. The RPTP also sits alongside ORCs Climate strategy 2024..	
Alex King		RPTP-0549	General	Request to implement an ambitious goal of minimising fossil fuel-emitting vehicle-kilometres from Otago's transport sector, such as 90% reduction over 5 years.	No changes to RPTP - noting	We acknowledge the request however this is outside of the scope of the RPTP. The RLTP deals with the transport sector as a whole. This plan focuses on PT's role in providing an effcient reliable and accessible public transport service that meets community needs in order to reduce car dependency.	We acknowledge the request however this is outside of the scope of the RPTP. The RLTP deals with the transport sector as a whole. This plan focuses on PT's role in providing an effcient reliable and accessible public transport service that meets community needs in order to reduce car dependency.	
Alex King		RPTP-0549	General	Request on p. 93 to add the explicit target to the mode share success measure to increase by 30% per annum (i.e. 7% in 2024, 9% in 2025, 12% in 2026, 15% in 2027, 20% in 2028, 26% in 2029)	No changes to RPTP - noting	The submitter's point is noted. Mode share targets currently sit in Shaping Future Dunedin Transport programmeme business case and DCC Zero Carbon plan and Queenstown Public Trasport Business case.	The submitter's point is noted. Mode share targets currently sit in Shaping Future Dunedin Transport programmeme business case and DCC Zero Carbon plan and Queenstown Public Trasport Business case.	
Alex King		RPTP-0549	Collaboration with institutions	Request to collaborate with other agencies to coordinate with other environmental policy such as carbon taxes, fuel supply limits, parking and wider transport plans.	No changes to RPTP - noting	Focus Area 2 Build trust is about engaging with our communities and investment partners to make sure public transport services meet the needs of the community including coordinating wider transport plans and parking policy. Carbon taxes and limiting fuel supplies is outside the scope of the RPTP.	Focus Area 2 Build trust is about engaging with our communities and investment partners to make sure public transport services meet the needs of the community including coordinating wider transport plans and parking policy. Carbon taxes and limiting fuel supplies is outside the scope of the RPTP.	
Alex King		RPTP-0549	General	Request to strengthen the second ORC transport aspiration (p. 9) to state the substantial elimination of fossil fuel use in Otago within 5 years as an explicit goal.	No changes to RPTP - noting	The trasnport aspirations listed on pg9 of this plan are directly from ORCs strategic directions 2023-2024. This is outside the socpe of this consultation and plan.	The trasnport aspirations listed on pg9 of this plan are directly from ORCs strategic directions 2023-2024. This is outside the socpe of this consultation and plan.	
Alex King		RPTP-0549	General	Request on p. 17 to reframe Focus Area 1 from from "useful public transport services" to "the dominant supplier of transport services beyond walking and cycling" for all of Otago's residents	No changes to RPTP - noting	Thank you for your suggestion. We believe the wording 'useful public tranpsort services' captures this intent in a more succinct manner.	Thank you for your suggestion. We believe the wording 'useful public tranpsort services' captures this intent in a more succinct manner.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Alex King		RPTP-0549	General	Request on p. 17 to reword Focus Area 1 to explicitly mention all Otago residents including the transport disadvantaged, or to make serving transport disadvantaged people its own focus area.	No changes to RPTP - noting	Thank you for your suggestion. The plan is a regional public transport plan for Otago so is for all Otago residents. We believe it would be duplication to specifically mention that in all objectives. Transport disadvantage people are a key focus of the plan and Section 2.8 pg 33 outlines specifically our policy and drive to improve accessibility for those who are transport disadvantaged.	Thank you for your suggestion. The plan is a regional public transport plan for Otago so is for all Otago residents. We believe it would be duplication to specifically mention that in all objectives. Transport disadvantage people are a key focus of the plan and Section 2.8 pg 33 outlines specifically our policy and drive to improve accessibility for those who are transport disadvantaged.	
Alex King		RPTP-0549	General	Request on p. 17 to reword Focus Area 3 to "... a public transport system that is key to eliminating all fossil fuel usage and carbon emissions in Otago."	No changes to RPTP - noting	We acknowledge the submitter's point, and that public transport has a key role in reducing fossil fuel use and carbon emissions, but eliminating ALL fossil fuel use and carbon emissions in Otago is over ambitious and outside the scope of this plan.	We acknowledge the submitter's point, and that public transport has a key role in reducing fossil fuel use and carbon emissions, but eliminating ALL fossil fuel use and carbon emissions in Otago is over ambitious and outside the scope of this plan.	
Alex King		RPTP-0549	Timetables	Request on p. 30 to not deprioritise adhering to a clockface timetable unless it results in very minor cost.	No changes to RPTP - noting	Thank you for your feedback. Policy SQ A1 prioritises repeating clock face schedules as much as practical within the scheduling of multiple services.	Thank you for your feedback. Policy SQ A1 prioritises repeating clock face schedules as much as practical within the scheduling of multiple services.	
Alex King		RPTP-0549	Timetables	Request on p. 30 to remove timetables for services running frequently (every 15 minutes or less) and instead monitor services to ensure there is a 15-minute maximum wait at all stops.	No changes to RPTP - noting	Thank you for your feedback. The aim of a frequent and reliable network is to have services running at a high frequency to eliminate the need to have timetables or long waits between services. Unfortunately we are not in a position to ensure all services run at 15 min frequencies. The Dunedin fares and frequencies business case plans to progressively improve the frequency on the Dunedin network, but this is not currently funded.	Thank you for your feedback. The aim of a frequent and reliable network is to have services running at a high frequency to eliminate the need to have timetables or long waits between services. Unfortunately we are not in a position to ensure all services run at 15 min frequencies. The Dunedin fares and frequencies business case plans to progressively improve the frequency on the Dunedin network, but this is not currently funded.	
Alex King		RPTP-0549	Timetables	Request on p. 30 SQ A1 to remove the bullet point on the use intermediate timing points.	No changes to RPTP - noting	Intermediate timing points are important to allow drivers to recover early or late running that has been influenced by network conditions. Retain this bullet point in SQ A1	Intermediate timing points are important to allow drivers to recover early or late running that has been influenced by network conditions. Retain this bullet point in SQ A1	
Alex King		RPTP-0549	Accessibility	Request on p. 36 to add TM A6: Allow a hybrid Total Mobility system where a passenger is taken to/from a bus stop and assisted on/off the bus by the Total Mobility provider.	No changes to RPTP - noting	Thank you for your suggestion. Whilst TM allows for fluctuating needs, this is not possible as the eligibility criteria for TM is not being able to use the bus network.	Thank you for your suggestion. Whilst TM allows for fluctuating needs, this is not possible as the eligibility criteria for TM is not being able to use the bus network.	
Alex King		RPTP-0549	General	Request on p. 40 to re-frame EQ A3: "Prioritize public transport investments and policies that enable a patronage-focused network. A sub-priority is to increase patronage for transport-disadvantaged people."	No changes to RPTP - noting	Thank you for your suggestion. The key point of this action here is that we aim to increase patronage for transport disadvantaged, recognising that we need to manage trade offs between patronage oriented and coverage oriented networks. Coverage oriented networks still have a strong role in servicing people disadvantaged by location.	Thank you for your suggestion. The key point of this action here is that we aim to increase patronage for transport disadvantaged, recognising that we need to manage trade offs between patronage oriented and coverage oriented networks. Coverage oriented networks still have a strong role in servicing people disadvantaged by location.	
Alex King		RPTP-0549	General	Request on page 48 for a new policy to be introduced as DC P1, with the existing policies re-numbered. "The public transport service should be designed to displace carbon emissions from the existing transport as quickly as possible, and to enable a complete decarbonization of the transport sector in Otago.	No changes to RPTP - noting	Thank you for your suggestion. We prefer for this plan not to overstate its reach. Whilst the point for 'the public transport service to be designed to displace carbon emissions from existing transport as quickly as possible', it is not possible for PT to fully decarbonise the whole transport sector of Otago. We feel the plan in its entirety is focused on encouraging as many PT trips as possible. Other trips such as freight and commercial are outside of public transport services.	Thank you for your suggestion. We prefer for this plan not to overstate its reach. Whilst the point for 'the public transport service to be designed to displace carbon emissions from existing transport as quickly as possible', it is not possible for PT to fully decarbonise the whole transport sector of Otago. We feel the plan in its entirety is focused on encouraging as many PT trips as possible. Other trips such as freight and commercial are outside of public transport services.	

Name	Organisation	Submitter # (UID)	Topic	Summary of feedback/request	Staff recommendation	Initial staff response	Final response after deliberations	Recommended action to plan
Alex King		RPTP-0549	Regional services	Request for our regional expansion to be reframed to "subject to funding and further study" and "speculative" to "obtain necessary funding to establish...", and to shorten the timeframes from 30 years for introducing these regional services.	No changes to RPTP - noting	Thank you for your suggested change, however whilst we advocate to obtain the necessary funding to expand our networks, we are are reliant on our priorities aligning with central government priorities and therefore can do not have that level of certainty.	Thank you for your suggested change, however whilst we advocate to obtain the necessary funding to expand our networks, we are are reliant on our priorities aligning with central government priorities and therefore can do not have that level of certainty.	
Alex King		RPTP-0549	General	Request on p. 71 to remove the language around "choice" and replace it with a discussion of appropriate modes: active modes for shorter trips for those who are able, and public transport for the longest trips and for those unable to access other modes.	Change to RPTP	Thank you for your point. Suggest adding the words 'for those who are able' to the end of the first sentence of the third paragraph.	Thank you for your point. Suggest adding the words 'for those who are able' to the end of the first sentence of the third paragraph.	Change the first sentence of paragraph 3 on pg 71 to read ' Our aim is for active transport to be the preferred mode for short journeys in urban areas for those who are able.
Alex King		RPTP-0549	Fares concessions	Request on p. 85 to change F P2: add "off-peak use incentive" to the list of fare structure elements	Change to RPTP	Thank you for your point. Whilst this is not an element we use while we have a low flat fare, this is something that could be used in a future fare structure.	Thank you for your point. Whilst this is not an element we use while we have a low flat fare, this is something that could be used in a future fare structure.	Add 'off-peak use incentive' to the bottom of F P2, page 84
Alex King		RPTP-0549	Fares concessions	Request to increase the discount for youth fares to 50% (from 40%)	No changes to RPTP - base fare decision	Child and youth concession value decision	Change to Plan: There will be a uniform 40% concession for 5-18 year olds in all of Otago.	Child (5-12 years) concession discount listed in F P3 changed from 100% to 40%
Alex King		RPTP-0549	Reliability	Request on p. 93 to change on-time performance measure to not include "between 1 minute early" as no buses should leave ahead of the timetable.	No changes to RPTP - noting	We agree that no buses should leave early, however one minture is considered a margin of error when monitoring and evaluating our service providers.	We agree that no buses should leave early, however one minture is considered a margin of error when monitoring and evaluating our service providers.	
Alex King		RPTP-0549	General	Request on p. 95, within Non-significant variations, "Fare level and structure changes" should be replaced by "Fare level and structure changes such that, for each journey on the network, the fare amounts to either no more than a 10% increase on the year prior, or no more than 20% on 2 years prior, after allowing for inflation in both cases."	No changes to RPTP - noting	Thank you for your suggestions. We prefer keeping the language broad to enable some discretion. Affordability for our community is always at the forefront of our decision making.	Thank you for your suggestions. We prefer keeping the language broad to enable some discretion. Affordability for our community is always at the forefront of our decision making.	
Alex King		RPTP-0549	Fares base fare	Request for fare changes to happen incrementally (e.g. no more than 10% per year) to maintain trust with passengers.	No changes to RPTP - base fare decision	Noted thanks	No change from Draft Plan. The base adult fare will be \$2.50 across Otago. Incremental change -- there will be an annual review of base fare	
Alex King		RPTP-0549	General	Request on p. 108 to differentiate on density in the core and the periphery.	No changes to RPTP - noting	Noted thanks, this definition already includes the distinction of less density on the periphery.	Noted thanks, this definition already includes the distinction of less density on the periphery.	
Alex King		RPTP-0549	Funding	Believes the private share targets are ambitious and should be achieved without significant fare increases, and rather with large patronage lifts.	No changes to RPTP - noting	Thank you for your feedback.	Thank you for your feedback.	



Draft Otago Regional Public Transport Plan 2025-2035

Hearings and deliberations report

19 May 2025

Prepared by Otago Regional Council Transport staff

May 2025





Table of Contents

1. Introduction3

2. Background3

3. Engagement and public consultation5

4. Overview of submissions8

5. Summary of submissions from key stakeholders10

6. Key topics.....13

7. Common feedback themes24

8. Other considerations30

9. Recommended changes to the draft RPTP33

10. Appendix A: Submission topic descriptions50

11. Appendix B: Corrected Figure 7: Total Mobility trip funding examples and breakdown
53



1. Introduction

Otago Regional Council (ORC) approved the draft Otago Regional Public Transport Plan (RPTP) 2025-2035 for public consultation on 19 March 2025. The draft RPTP was open for public submissions from 24 March to 2 May 2025.

The Officers' Hearings Report was prepared by ORC staff to provide the Hearings Panel (the Panel) with:

- An outline of the purpose of the draft RPTP and rationale for the plan review
- A summary of the early engagement and public consultation
- A brief overview of submissions, including submitter demographics
- A summary of the submitters' responses to the five key topics we sought feedback on
- A staff response to submissions received
- Staff recommendations on proposed changes to the draft RPTP to address submission points

Council appointed Councillors Noone, Weir and Wilson to the Panel to hear and deliberate on public submissions on the draft RPTP. The Panel heard submitters on 13, 14 and 16 May 2025 and completed deliberations on 19 May 2025.

The Officers' Hearing report was used by the Panel (alongside the full submissions spreadsheet) when considering submissions, deliberations and making recommendations to Council.

This report contains the outcomes of deliberations including the Panel's recommendations to be considered by Council on 25 June 2025.

2. Background

2.1 Legislative requirements

The Otago Regional Public Transport Plan is the guiding document for the planning and delivery of public transport in Otago.

Under the Land Transport Management Act 2003 (LTMA) [Section 117](#), the purpose of an RPTP is to provide:

- a) A means for encouraging regional councils, territorial authorities, and public transport operators to work together in developing public transport services and infrastructure
- b) an instrument for engaging with the public in the region on the design and operation of the public transport network
- c) a statement of integral public transport services, the policies and procedures applying to those services, and the information and infrastructure that support those services.

More information on the content requirements of an RPTP and the required process of preparing an RPTP can be found in LTMA Sections [120](#) and [125](#), respectively.



This RPTP has been developed in accordance with the LTMA and the New Zealand Transport Agency Waka Kotahi's (NZTA's) Development Guidelines for Regional Public Transport Plans (2024).¹

2.2 Changes from the Otago Regional Public Transport Plan 2021-2031

Under the LTMA Section [126](#), Council must conduct a review "at the same time as, or as soon as practicable after, the public transport service components of a regional land transport plan are approved or varied."

On 24 July 2024, Council approved the mid-term review of the Otago Southland Regional Land Transport Plan (2021-2031), triggering a renewal or variation of the current RPTP 2021-2031.

The draft RPTP now reflects:

- Changes through the Government Policy Statement on land transport 2024
- The current post Covid-19 operating environment
- Procurement changes triggered by changes to the LTMA 2023 with respect to how services are contracted and delivered
- Changes in NZTA Public Transport Design Guidance²
- The Queenstown Public Transport and Dunedin Fares and Frequencies Business Cases
- New Zealand Transport Agency Waka Kotahi's (NZTA's) Development Guidelines for Regional Public Transport Plans (2024) changes with respect to:
 - fares and pricing policy
 - private share
 - Total Mobility
 - Motu Move national ticketing solution
- Development of alternative modes of service provision such as on-demand public transport
- The evolution of Rautaki Whakawhanake A-Mua O Otepoti Dunedin Future Development Strategy 2024-2054, and Grow Well Whaiora Queenstown Spatial Plan.

The draft Otago RPTP 2025-2035 was first presented to the Public and Active Transport Committee (PATC) at the 5 March 2025 meeting. The draft differs from the current RPTP in several key policy areas:

Policy area	The draft RPTP 2025-2035 establishes policies and actions to:
Community transport	Research and develop a community transport programme to support non-profit, volunteer-led transport services in Otago's smaller towns and rural areas where people have few options to get around.

¹ <https://www.nzta.govt.nz/assets/resources/guidelines-for-regional-public-transport-plans/docs/2024-development-guidelines-for-regional-public-transport-plans.pdf>

² <https://nzta.govt.nz/walking-cycling-and-public-transport/public-transport/public-transport-framework/integrated-planning-and-design/public-transport-design-guidance/>



Land use policy	Proactively support sustainable land use policy and integrate public transport design with well-functioning urban environments, in line with the National Policy Statement on Urban Development.
Build trust	Adopt an equity-focused approach to decision-making, particularly to support the needs of transport disadvantaged people.
Funding	Actively work to increase private share over time, in line with the Government Policy Statement on land transport 2024-2034.

3. Engagement and public consultation

3.1 Early engagement

In developing the draft RPTP, staff undertook an engagement process that followed internal ORC guidelines³. This process meets the consultation requirements in the LTMA Act 2003 (sections 124 and 125), and follows the principles of consultation detailed in the Local Government Act 2002 (section 82). Staff also engaged with mana whenua following He Mahi Rau Rika: Otago Regional Council Significance, Engagement and Māori Participation Policy in recognition of our partnership approach.

Engagement involved a combination of surveys, focus groups and meetings with 52 stakeholder groups across Otago, including partner agencies (NZTA, territorial authorities and public transport operators), workforce, and community groups with an interest in public transport and our mana whenua partners. Staff also worked closely with our partner agencies to review and co-design the draft RPTP to ensure alignment across our organisations.

Staff also involved Otago Regional Councillors throughout this process, holding two Council workshops and providing regular updates to the PATC and Council.

3.2 Public consultation

The public had the opportunity to provide feedback on the draft RPTP over a six-week period from 24 March to 2 May 2025. Although the LTMA requires only one month for public consultation, ORC extended this timeframe to accommodate the public holidays during this period.

Staff took a multifaceted approach to engagement to reach as many people as we could across the district using different mediums and styles of engagement approaches, materials and locations. The core objective was to ignite a conversation about public transport and encourage a wide range of Otago residents to share their views. Care was taken to try and reach as diverse cross section of our population, including transport disadvantaged groups, such as disabled groups, and communities who currently lack public transport. The table below summarises the methods staff used as well as general feedback on each consultation component

³ See ORC Engagement Approach: A Guide to Connecting with Community (2024).



Methods of consultation	Description	General feedback from staff
Contacting key stakeholders ⁴	ORC staff contacted and encouraged key stakeholders to make submissions.	No feedback.
Public drop-in sessions	ORC staff held public drop-in sessions in Dunedin (3), Queenstown (2), Alexandra (1), Ōamaru (2), Wānaka (1) and Cromwell (1). These sessions occurred from 25 March to 17 April and enabled members of the public to speak with staff about the draft RPTP and public transport more generally.	In-person drop-in sessions were crucial to allow the public to ask questions, provide verbal feedback and demonstrate our commitment to open and transparent engagement. Staff visited towns throughout the region, including those without public transport to get a breadth of perspectives, and make it easy for the public to engage. Attendance at drop-in sessions ranged from 3 to 17 people at each session. Attendees included people whom we had previously engaged, people who actively wanted to speak to staff and members of the public passing by. Staff also compiled a spreadsheet reviewing the suitability of each location that can be used to guide consultation for future plans across the organisation.
Advertising campaign	ORC communications team launched a comprehensive advertising campaign to encourage submissions on social media, ORC website, radio, newspapers, posters (on and off the bus), newsletters and the Transit app.	Staff optimised the available budget to more effectively reach target audiences. Messaging was effective and well-executed across multiple channels, and web traffic for the general transport plans website from 24 March to 7 April 2025 was up 560% from the previous two weeks. The result was a 183% increase in submissions compared to the current RPTP.
Library	ORC staff mailed or dropped in copies of the draft RPTP and a summary documents to 27 libraries throughout the region.	No feedback.

⁴ Key stakeholders include mana whenua partners, community groups, workforce and partner agencies who have a significant interest in public transport in Otago.



4. Overview of submissions

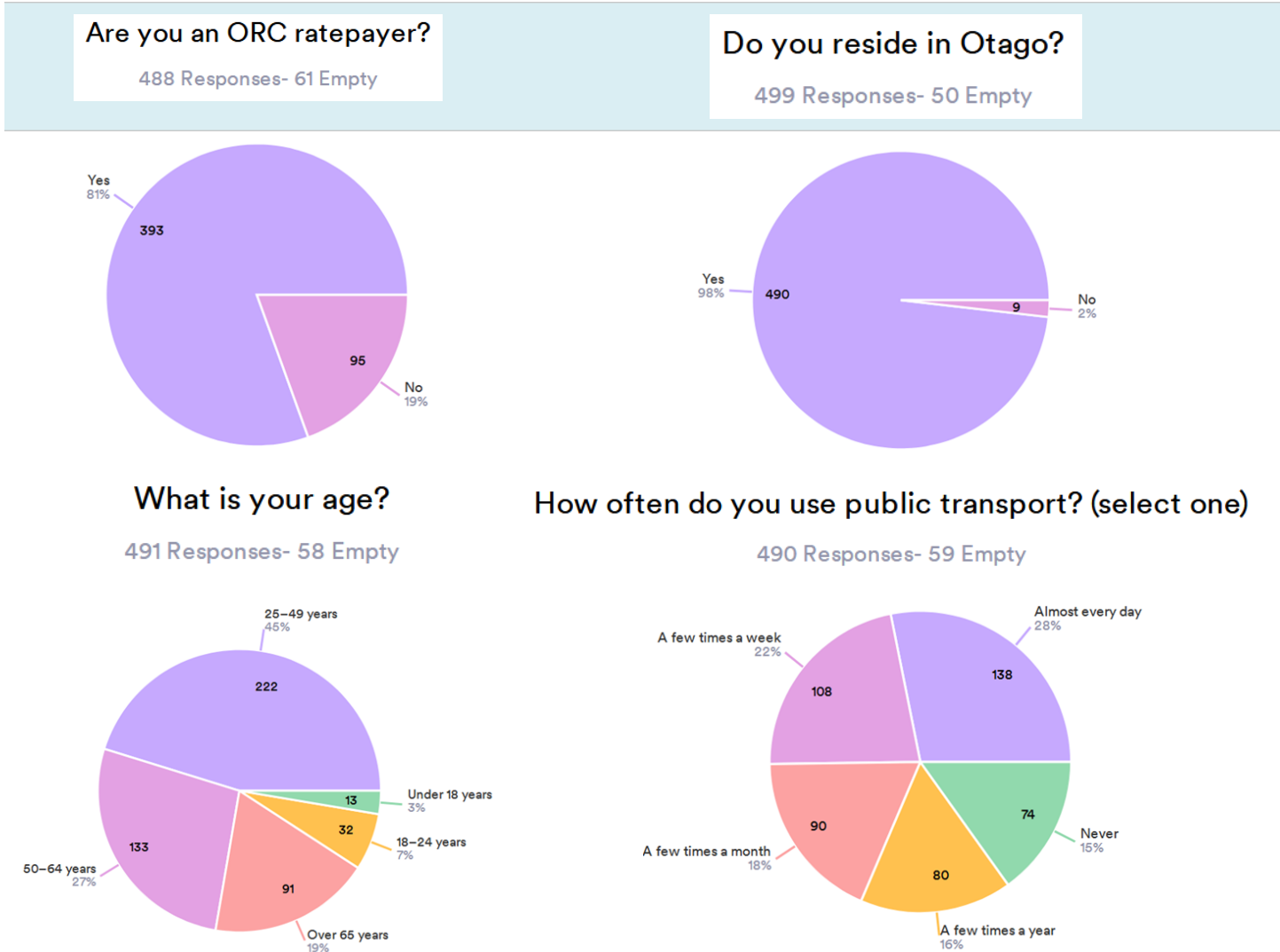
In total, **549 submissions** were received, of which three full submissions and one amendment to a submission were received late. 48 submitters requested to speak to the Hearings Panel. The total number of submissions is a **183% increase** from the current Otago RPTP 2021-2031, which received 193 submissions.

While most submissions came from individuals, roughly 40 submissions were made on behalf of government agencies and ministries, territorial authorities, community advocacy groups, tourism groups and educational institutions across Otago. The high number and diversity of submitters highlight strong public interest in the draft RPTP and the effectiveness of engagement throughout the development and consultation processes.

4.1 Submitter demographics

Of the total 549 submissions, 78% of submitters indicated they were from areas currently served by the fixed urban bus network (e.g. Dunedin and Queenstown), while 20% of submitters indicated they came from areas not currently served by public transport (e.g. Ōamaru and Wānaka).

The following charts summarise submitters' demographic data, including ratepayer status, whether they normally reside in Otago, age, and how often they use public transport.





5. Summary of submissions from key stakeholders

In preparing the draft RPTP, LTMA section 125 requires ORC to draft the RPTP in collaboration with the regionals' territory authorities. The draft RPT reflects the shared working sessions and input from Dunedin City Council, Queenstown-Lakes District Council, Central Otago District Council, Clutha District Council and Waitaki District Council transport staff. Building and maintaining collaborative working relationships with these stakeholders is crucial to delivering a well-functioning and integrated public transport system.

Further the LTMA lists key entities Council must consult with in preparing the draft RPTP. This section provides a summary of submissions received from key stakeholders.

Dunedin City Council

The submission from Dunedin City Council (DCC) (Submission RPTP-0478) was broadly supportive of the draft RPTP and acknowledged the collaborative approach ORC has taken in developing the document alongside other territorial authorities across Otago.

DCC identified four aspects for greater emphasis in the draft RPTP:

1. A stronger focus on network and service planning, including a request to review the current bus network, Dunedin Bus Hub, integration of schools in the bus network and consideration of a new bus depot.
2. Additional emphasis on promotion and marketing, including further collaboration between ORC and DCC about sustainable travel initiatives, such as school travel planning.
3. More options to reduce emissions by introducing new bus services (e.g. commuter services to Dunedin from Balclutha and Ōamaru, a Dunedin airport service and improved services to the Edgar Centre) and encouraging ORC involvement in pre-application and consent processes for major subdivisions and developments to maximise potential integration with the public transport network.
4. A request for a Central City Loop bus and increased frequency of service to the North Coast in planned network changes.

DCC agreed to the following:

- The focus areas within the draft RPTP capture Otago's transport priorities.
- ORC should have a role in supporting regional community transport services.
- ORC should retain free fares for children ages 5-12 years and standardise the concession discount for youth ages 13-18 years.

DCC did not take a stance on increasing fares or introducing a zone fare structure. However, they acknowledged the importance of working with ORC to keep fares low and encourage more people to take public transport rather than private cars.

Clutha District Council

The submission from Clutha District Council (CDC) (Submission RPTP-0262) was generally supportive of the draft RPTP. They were encouraged to see inter-regional transport as a top



priority and were keen to collaborate to promote community transport and fixed-route bus services connecting Gore, Balclutha, Milton and Dunedin. They also mentioned the need for 'right-sized' public transport services that are regular, affordable, coordinated and suited to commuters.

CDC did not support increasing fares or introducing a zone fare structure, though they mentioned free fares within highly populated areas should be considered.

Waitaki District Council

The Waitaki District Council (WDC) submission (Submission RPTP-0479) acknowledged that there has been progress in public transport in recent years, including through Total Mobility and the Dunedin to Palmerston bus service.

WDC requested more public transport in the area, including community transport to improve access to the Dunedin hospital, daily bus services between Ōamaru and Dunedin, a fixed-route bus service between Weston and Ōamaru and an on-demand bus service within Ōamaru.

WDC also outlined suggestions for minor wording changes to the draft RPTP's focus areas.

Queenstown-Lakes District Council

The Queenstown-Lakes District Council (QLDC) submission (Submission RPTP-0546) acknowledged the value of the early engagement undertaken by ORC staff in developing the RPTP and related work. QLDC was also encouraged to see proposed improvements to routes and frequencies to achieve mode shift goals.

The submission comprised two overarching points:

- The draft RPTP should further recognise resident and visitor growth in the Queenstown-Lakes district, which significantly impacts the ability of the transport network to operate efficiently and effectively.
- QLDC encourages increasing private share and increases fares by a minimal amount but opposes the introduction of a zone fare structure.

New Zealand Transport Agency

The submission from NZTA (Submission RPTP-0539) commended ORC councillors and staff for the quality of the draft RPTP.

NZTA opposes free fares for children as they contradict the Government Policy Statement (GPS) on land transport's requirement to increase private share. They also indicated they are unlikely to financially contribute to support free fares for children and suggested that child concessions should be more closely aligned with that of other Public Transport Authorities.

NZTA agrees that the adult Bee card fare should be increased to \$2.50 and that this base fare level should be reviewed annually, in accordance with the draft RPTP policy F P6 (p. 85 of the draft RPTP).



NZTA's submission also noted that due to delays in the Queenstown Arterials stages 2 and 3, it is worthwhile to re-examine ORC's Queenstown Public Transport Business Case to test if the original business case assumptions still apply.

NZTA also attached a table containing roughly 70 lines of feedback and requests for wording changes on individual paragraphs in the draft RPTP.

Ministry of Education

The submission from the Ministry of Education (Submission RPTP-0547) broadly supported the contents of the draft RPTP, including specific measures to provide public transport services for school students.

The Ministry of Education provided further context on school transport assistance policy and outlined steps to clarify and rationalise the delivery of school transport services in Dunedin and Queenstown-Lakes. The Ministry of Education appreciated the steps ORC has taken to provide additional services and capacity to meet student travel demand, highlighting the benefits of ongoing collaboration.

They also provided a table suggesting minor comments to sections of the draft RPTP related to targeted services, the Queenstown urban network aspirations, integral and exempt services and funding.

University of Otago

The submission from the University of Otago (Submission RPTP-0489) acknowledged the importance of collaboration in improving public transport and welcomed the intention to strengthen collaborative working relationships with ORC, both operationally and in terms of research. The University also noted that bus services in Dunedin have improved over the past few years, including the rollout of electric buses, which is important for staff and students.

The University highlighted several key areas that could be improved, including more direct bus routes to the University, an airport bus service and routes connecting Balclutha and Ōamaru with Dunedin. They also expressed interest in collaborating to invest in South Island passenger rail services for students at certain times of the year, such as the beginning and end of semesters.

The University had concerns about a zone fare structure and encouraged ORC to model the potential negative emissions impact of increasing public transport for longer journeys against potential revenue gains.

6. Key topics

Submitters were asked to provide feedback on five topics in the draft RPTP. This section provides a summary of the feedback on these submission topics, staff's responses and recommendations.

6.1 Topic 1: Focus areas



Are we focusing on the right things in the plan?

Topic 1 invited submitters to provide feedback on the draft RPTP's focus areas and objectives, which shape ORC's policies and actions for the design and delivery of public transport services. The question aimed to understand submitters' alignment with how the draft RPTP proposes ORC spend time and effort on public transport, as well as the draft RPTP's overall structure.

Summary of submissions

487 submitters responded to this question, with 62 choosing not to respond.

78% of submitters (379) agreed that these focus areas accurately capture Otago's public transport priorities. 22% of submitters (108) did not agree.

Responses from submitters generally supported the chosen focus areas and objectives and acknowledged they were appropriate high-level goals for this document. However, some submitters expressed concerns about achieving these focus areas and objectives in practice.

Several submitters wanted issues that were particularly important to them, such as safety, reducing the reliance on private vehicles and affordability for passengers to be featured more prominently in the focus areas and content.

Several submitters also proposed alternative wording for the focus areas objectives to improve them while maintaining the original sentiment.

As this was the first question of the survey, many submitters responded to this question by commenting on general issues related to public transport that were not specifically related to the focus areas or objectives.

Staff response to submissions

It was not unexpected that many responses to this topic did not focus on providing feedback on the focus areas and objectives. This was largely because it was the first open-ended question, and it appears many submitters wanted their broader opinions about public transport at the front of their submission.

Staff acknowledge submitters' concerns about achieving the focus areas and objectives in practice. These concerns are not directly linked with the focus areas and objectives in the draft RPTP but are a more general sentiment that they may be too aspiration and our ability to deliver them constrained.

Staff recognise that submitters want particular issues (e.g. safety, private car dependency and affordability for passengers) to feature more prominently in the focus areas and objectives. The draft RPTP is a strategic document, and the focus areas and objectives were designed to be broad enough to encompass many public transport issues.

In most cases, the issues that submitters wanted more prominently featured are reflected in sub-sections under the focus areas. For example, safety is discussed on page 22 of the draft



RPTP and is explicitly mentioned in the 'Passenger Experience' focus area and objective. Similarly, affordability for passengers is discussed on page 84 of the draft RPTP under the 'Value for Money' focus area. Staff agree that it would be good to incorporate wording to reducing reliance on private vehicles more specifically within the draft RPTP.

There is a high level of interrelationship between focus areas and in preparing the draft RPTP, staff tried alternative wording and structure to the focus areas and content within each area. Staff consider that the focus areas and objectives accurately capture where ORC needs to place its time and effort and set out how it will achieve these.

Staff appreciated some proposed alternative wording for the focus area objectives while still maintaining the original sentiment.

Financial considerations

There are no financial implications.

Staff recommendations

As a result of submissions, staff recommend several modifications to the focus areas and objectives.

We recommend a wording change to the 'Passenger Experience' objective statement (see p.17 of the draft RPTP) from:

'Provide useful public transport services that respect the safety and well-being of passengers, particularly for transport-disadvantaged people' to:

'Provide useful public transport services that promote social inclusion and respect the safety and wellbeing of all passengers'

This wording change prioritises social inclusion and serving all passengers, rather than emphasising priority on transport-disadvantaged people only.

Staff also recommend the wording of the 'Environmental Sustainability' objective statement (see p. 17 of the draft RPTP) from:

'Invest in a public transport system that promotes positive outcomes regarding greenhouse gas emissions, pollutants and land use' to:

'Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and development.'

This incorporates the aspiration to reduce reliance on private vehicles and elevates the importance of sustainable urban planning and development. While reducing private vehicle reliance is discussed throughout the draft RPTP, adding it to the focus areas would further emphasise it as the future vision for Otago. Staff also support the change in wording, which makes the objective stronger.



Additionally, we recommend adding a 'benefits of public transport' sub-heading to the 'Value for Money' introduction (p.80 of the draft RPTP). Currently, this focus area emphasises the cost of public transport but not the value it adds to our communities, environment and economy.

Staff considered whether safety should be its own focus area and objective, but felt safety was accurately captured under the 'Passenger Experience' focus area. The topic of safety has been weaved throughout each of the focus areas for ease of reading and avoidance of duplication.

Staff recommend making no other focus area-related changes to the draft RPTP.

Panel recommendations

The Panel accepts the change wording of Passenger Experience objective statement and recommends a slight modification to the Environmental Sustainability objective statement as outlined in the table in Section 9.1 of this report.

6.2 Topic 2: Community transport

Should we support community transport in smaller towns and rural areas?

Topic 2 invited submitters to provide feedback on whether ORC should consider establishing a subsidised programme that provides support for 'community transport' services in Otago's smaller towns and rural areas.

Summary of submissions

492 submitters responded to this question, with 57 choosing not to respond.

92% of submitters (454) agreed that ORC should support community transport in smaller towns and rural areas. 8% of submitters (38) did not agree.

Many submitters recognised the lack of transport options in Otago's smaller towns and rural areas and understood community transport to be a potential solution.

Submitters who supported community transport cited the potential for the services to help elderly people living in rural areas to access opportunities, such as health care appointments in Dunedin. They also cited the St. Johns health shuttles as an example of an existing community transport service that positively impacts communities.

Submitters who did not support community transport cited concerns about cost, high reliance on volunteers, and risk of resources being diverted from urban services. Several submitters mentioned that community transport would be helpful in the Upper Clutha area, but that a fixed route bus service or passenger rail might better meet the region's growing transport demand.



Staff response

Staff endorse the community's support of the community transport concept and its role to provide transport options in smaller communities where a fixed route service(s) are not feasible.

Staff also acknowledge submitters' concerns about the cost to ratepayers for supporting community transport services. As a strategic document, the draft RPTP does not specify how community transport may be funded. Page 37 of the draft RPTP outlines the criteria for ORC supporting community transport services and notes that support is conditional on funding availability.

Staff also recognise submitters' requests for ORC to support a fixed route bus service or passenger rail to meet travel demands between smaller towns and rural areas. Pages 49 and 52 of the draft RPTP state that ORC will design the public transport network and services in a 'mode-neutral' way that uses the most appropriate mode (e.g. bus, ferry, train, etc.) to meet demand, purpose, community need and value for money. Community transport is a potential transport solution that presents excellent value for money and could significantly increase the connectivity of people living in Otago's smaller towns and rural communities. ORC's potential support for community transport does not exclude support for other forms of public transport in the future. For example, pages 59-61 of the draft RPTP highlight plans to improve regional connectivity through the establishment of bus services over the next 30 years.

Financial considerations

ORC support for community transport will require additional funding and/or resourcing. It is unlikely that NZTA will provide financial support for community transport at this stage, as it does not align with the current GPS's strategic priorities.

Should the Hearing Panel accept submissions on community transport, the timing and scale of a future community transport programme will need to be determined following direction from Council and taking into account funding processes including the NLTF and LTP.

Staff recommendations

We do not recommend any changes to the community transport section of the draft RPTP as a result of submissions.

Submitters did not raise concerns that would warrant changes to the community transport section (p. 37-38) of the draft RPTP. As it is currently written, the section establishes strategic goals and provides guidance on community transport while allowing Council the flexibility to determine specific implementation details.

Panel recommendations

The Panel supports the staff recommendation that there are no changes needed to the community transport section of the RPTP.



The Panel made a general recommendation that the actions and aspirations in the RPTP are funded and implemented as outlined in Section 9.3 of this report.

6.3 Topic 3: Base fare increase

Should we increase our passenger fares?

The decision of a base fare increase is formally beyond the scope of the RPTP. However, Council requested it be included in the 2025 draft RPTP's submission form due to its relationship with private share and the other RPTP policies being reset following the GPS. An alignment of the RPTP process with the Annual Plan process (which sets fares) is required to ensure one informs the other, and all impacts are properly considered.

The submission request intended to gauge public support for a proposed base fare increase from \$2 to \$2.50, which represents a 25% change. This fare change would not only increase the adult Bee Card fare, but will also impact concession fares due to them being calculated as percent discounts off the base fare.

This question was prefaced against the current funding environment. The draft RPTP summary document provided an overview of central government's expectation for public transport authorities to increase the private share of public transport funding. We asked submitters to consider raising fares to enable us to work towards achieving compliance with this expectation and maintain and improve our services.

Summary of submissions

483 submitters responded to this question, with 66 choosing not to respond.

47% of submitters (226) agreed that ORC should increase the adult Bee Card fare. 53% of submitters (257) did not agree.

Of the 47% of submitters that agreed with increasing fares, there was general consensus that \$2.50 was an appropriate increase. There was no other clear fare price common in the submissions received.

Submitters supporting an increase in the adult Bee Card base fares cited that the increase may be necessary to maintain and improve services. Some submitters also mentioned that a \$0.50 increase was affordable for them. Other submitters offered conditional support if the adult Bee Card base fare increases were paired with service improvements, maintaining free child fares and the implementation of fare capping.

Submitters opposing a base fare increase cited the potential for higher fares to negatively impact patronage, as people may be more inclined to drive private vehicles, leading to worse environmental outcomes and less revenue. Some submitters stated that the higher fares would make public transport unaffordable for them.

Some submitters mentioned that fares should be free for all, and conversely some thought bus travel should be fully user pays.



Staff response

Staff were appreciative of the thoughtful feedback received. Submitters, whether supporting or opposing a fare increase, were able to understand nuances and link this question to other parts of fare policy such as private share, zones and concessions, and to other PT issues such as service levels.

Many submitters conditioned support (or reluctant acceptance) of fare increases on improving or maintaining service levels, or on other aspects of fare policy. In Queenstown, a base fare increase would coincide with service improvements in accordance with the Queenstown Public Transport Business Case. In Dunedin, there would be no link with immediate improvement in service levels, but staff are satisfied that a 25% increase in fares is proportionate and reasonable noting that this aligns with inflationary factors.

Overall, the response to this question gives staff satisfaction that on balance our community do not want to see a fare increase, however support long-term passenger affordability, while complying with NZTA direction and continuity of our services. A fare increase is in line with inflation since 2020 and our product will continue to be affordable to users.

Clearly, an increase in fares will have a negative impact on patronage (all else being equal). Modelling undertaken to understand the impact of fare increases on patronage and private share, indicates that a 25% fare increase would have a negative initial impact on patronage, estimated to be a reduction of 373,000 passenger trips per year (6.5% of patronage). Over a 10 year period, the negative impact of 25% higher fares would be around 10% of patronage. However, it should be noted that:

- Patronage would still grow overall – just not quite as far. In the modelling, only the first year saw a decrease in patronage, as other drivers of growth such as population growth would remain
- The revenue generated by higher fares could, if re-invested, recover a significant part of this patronage loss.

Financial considerations

While a 25% fare increase would have a negative impact on patronage, the impact on fare revenue would be positive. All else being equal, Stantec modelling indicates an initial increase in revenue of \$1.07million per year (13.5%). Over ten years, higher long-term elasticity would reduce the scale of benefit; with a \$7.1million dollars of increased revenue over 10 years (6.7%).

The financial benefits of going beyond a 25% fare increase, meanwhile, are marginal in the Stantec modelling. A 50% increase generates only \$1.8million extra over 10 years, relative to 25%; and a 75% increase generates less revenue than a 50% increase, and a 100% increase generates less revenue than a 25% increase. As such, the Stantec modelling shows that, under standard elasticity assumptions, **there is a strong case that a \$2.50 fare is a good balance between generating revenue and maintaining affordability.** This means staff consider a \$2.50 fare an appropriate response to requirements to increase private share.



There are also secondary benefits to this decision. Stronger revenue will put ORC in a better position for future funding processes, as NZTA evaluate value for money in their investment decisions.

Staff recommendations

As a result of submissions, staff recommend an increase in the base adult fare level to \$2.50, to be implemented within the next six months.

Panel recommendations

The Panel supports the staff recommendation and recommends that Council increase the adult base fare to \$2.50 before Q2 of the 2025/2026 financial year.

Note: the Panel recommends that they are implemented from 29 September which is during the school holidays.

Cr Wilson moved and Cr Noone seconded (carried).

6.4 Topic 4: Zone fare structure

Should we charge more for longer trips?

Topic 4 invited submitters to provide feedback on a proposal to replace the current flat fare structure with a zone fare structure for the urban bus networks in Dunedin and Queenstown. This would allow ORC to charge a higher fare for longer-distance trips. The proposed three to four zone structure would be simpler than previous more granular zonal systems in place before 2020.

Summary of submissions

481 submitters responded to this question, with 68 choosing not to respond.

44% of submitters (211) agreed that ORC should charge more for longer trips (i.e. move from a flat fare structure to a zone fare structure). 56% of submitters (270) did not agree.

Many submitters cited fairness around cost distribution as a core reason for their support, that it is unfair for people travelling a short distance to pay the same fares as someone travelling much farther. On the other hand, many submitters raised concerns that charging higher fares for people living farther away would increase household expenditure for people in those communities. Although the proposed zone fare maps were provided as attachments to the draft RPTP and the summary document, few submitters directly provided feedback on the zone boundaries.

Regardless of submitters' support or opposition to a zone fare structure, submitters were mostly concerned about two main factors: fare price and accessibility.

Submitters did not want the fares in farther zones to be increased to a point where driving personal vehicles was cheaper than taking public transport. Additionally, submitters wanted the zones to be accessible, transparent and easy to understand. Submitters were concerned



that zones might be too complex and confusing, as was the case with the zones previously used in Dunedin.

Staff response

The draft RPTP Fare policy F P2 (page 84) sets out what type of fare structure would be used to set our fares. Staff are exploring the option to move to a zone fare structure that balances the simplicity of a flat fare by retaining large zones in the urban centres with the ability to charge a higher fare to outer zones to recognise the additional cost of operating these services. This is in line with NZTA funding and fares policies to recover a greater share of operating costs from fares.

Staff support the points of many submissions for and against zonal structures including accessibility, transparency, fairness, and greater environmental impact of longer trips. Another important consideration is managing public transport's role in operating and providing transport options for outer suburbs that promotes positive environmental outcomes and supports sustainable urban planning and development. The draft RPTP gives weight to land use considerations which support focusing investment in areas where public transport performs well (Appendix E).

Financial considerations

Modelling work to understand the financial implications of the proposed zone fare structure has not yet been undertaken.

Staff recommendation

As a result of submissions, staff recommend that:

- no changes are required to the draft RPTP policy on fare structure and fare zones remain unchanged
- the exact details of fare zones (relative fare levels etc) will be subject to further modelling and analysis outside of the scope of this plan
- final decisions on multi-zone fares will be made through the 2026 Annual Plan process, with the potential to be implemented with the National Ticketing System in 2026.

During deliberations, staff adjusted their recommendation on the final bullet point to shift to a zone system in time for term 1 of the 2026 school year.

Panel recommendations

The panel recommends the following:

- a) No changes are made to the fare structure policy in the draft RPTP
- b) Moving to a zonal fare structure in the future
- c) The exact details of fare zones (e.g. relative fare levels) will be subject to further modelling and analysis outside the scope of this plan
- d) Implementation of fare structure changes, including zones, fare capping and use of cash are to occur in line with the transition to Motu Move

Note: The panel notes an expectation that prices for multiple fare zones are based on small/moderate increments of the base fare, and that there are a small number of zones.



Cr Noone moved and Cr Wilson seconded (carried).

6.5 Topic 5: Fare concessions

Should we keep our free fares for children (5-12 years) and standardise our concession discount for youth (13-18 years) to 40% across both the Dunedin and Queenstown networks?

Topic 5 invited submitters to provide feedback on how we manage child and youth fare discounts/concessions. PTAs must align with NZTA's fare concession requirements and set pricing as a discount off the base fare. Youth (5-18 years) concession discount value is set by the region, but must align with NZTA fares and funding policy direction to be eligible for co-funding.

ORC currently split youth passengers (5-18 years) into two separate concession categories, with 100% discount for children 5- 12 year olds across both urban networks, while youth (13-18 years) receive a 40% discount in Dunedin and 25% discount in Queenstown.

Summary of submissions

Retaining free fares for children

500 submitters responded to this question, with 49 choosing not to respond.

89% of submitters (446) agreed that ORC should retain free fares (100% discount) for children (5-12 years). 11% of submitters (54) did not agree.

Submitters who supported retaining free fares for children highlighted concerns about the potential increased financial strain on families, particularly given children's increased reliance on public transport in response to the reduction of dedicated school bus services. Submitters also mentioned that free fares for children would normalise their use of public transport, foster independence and encourage them to use public transport as adults.

Most submitters who opposed retaining free fares for children noted that child fares should be very cheap but not free, around \$1. Some submitters took contrary views that all users should pay the same.

Standardising concession discounts for youth in Dunedin and Queenstown

467 submitters responded to this question, with 82 choosing not to respond.

84% of submitters (390) agreed that ORC should standardise concession discounts for youth (13-18 years) to 40% across both the Dunedin and Queenstown networks. 16% of submitters (77) did not agree.

Submitters who supported standardising concessions for youth mentioned that doing so would make fares easier to understand and promote fairness and consistency across the region.



Several submitters mentioned that the discount should not be standardised due to the income difference between residents in Dunedin and Queenstown.

Many submitters who either supported or opposed standardising concessions did so on the basis that fares should be free for everyone, or free for people under 18 years old. Other common requests included increasing the youth concession from 40% to 50% and introducing student concessions.

The submission of NZTA states, with regards to 5-12 free fares, that:

The NZTA does not support free fares (that is, a 100% concession) because:

- *it is contrary to the Government Policy Statement (GPS) requirement to increase private share;*
- *the Crown has previously decided not to fund the same concession as part of Community Connect and it would be incongruous for a Crown entity to do so; and*
- *it would be inequitable for NZTA to support free fares for 5 to 12 year olds in Otago when it does not do so with almost all other public transport authorities (PTAs).*

The NZTA submission notes that the revenue foregone with the free concession is approximately \$436,000, half of which could be expected to be met by NZTA. Given the lack of alignment with the GPS and in equitability with other councils, there is a high chance that NZTA would adjust funding at least to the point where the revenue forgone from the concession is fully borne by ratepayers as is currently the case; this is without considering the impact on private share targets which could also result in adverse funding decisions in the next National Land Transport Funding (NLTF) round.

Staff response

Retaining free fares for children

Staff note the strong public support for free fares for children; this was the question on which the balance of public opinion was strongest. However, the submission of NZTA as co-funders must be given significant weight, in terms of articulating the potential negative impacts of retaining free fares. Staff advise that, given the likely and possible consequences of this policy, the risks that free 5-12 year old fares would impose on ORC's co-funding from NZTA is too great, relative to the benefits as expressed by submitters

Standardising concession discounts for youth in Dunedin and Queenstown

Staff expected that submitters would support standardising concession discounts for youth in Dunedin and Queenstown and note the benefits of such. Although there is a potential case for differentiating based on the different socio-economic profiles of Queenstown and Dunedin, this was not raised by a large number of submitters and we recommend the simpler approach of the draft RPTP is maintained.

Financial considerations

The potential negative impacts of retaining free fares for 5-12 year olds are threefold:



1. **Revenue foregone:** this is the revenue missed out on due to the 5-12 year old free fares
2. **No NZTA co-funding for child passengers:** more than doubles of the first impact due to misalignment with NZTA funding and fares policy
3. **Potential impact on long-term funding due to weaker private share performance:** beyond the above two costs, retaining free 5 – 12 year old fares would also reduce private share performance. Otago has much-needed improvements in Dunedin, Queenstown, and regionally, and poor private share could significantly reduce the chances of receiving co-investment for these improvements in future funding rounds.

The financial impact of amending the youth concession in Queenstown from 25% to 40% is minor. It would essentially cancel out the recommended base fare increase, keeping Queenstown youth fares at \$1.50, while Dunedin youth fares would increase from \$1.20 to \$1.50.

Staff recommendations

Staff recommend the removal of free fares for 5 – 12 year olds and a concession from the adult base fare be calculated and introduced within the next six months in line with a base fare increase. Staff recommend that the 5-12 year old age group has the same fare concession as the 13-18 year old group - a 40% discount on the full adult fare standardised across both networks. This equates to a child fare (for 5 – 18 year olds) of \$1.50.

Panel recommendations

The Panel recommends:

- a) The discontinuation of free fares for children (5-12 years)
- b) The child and youth discounts (5-18 years) be set to 40% of the full adult fare (i.e. \$1.50 fare)
- c) These changes be made at the same time as the base fare increase

Note: While acknowledging the strong public support for free fares, the Panel notes that the decision to discontinue free fares is made considering potential risks to funding that could lead to cuts to existing services.

Cr Wilson moved and Cr Weir seconded (carried).

7. Common feedback themes

This section highlights five common themes that emerged from submissions, separate from the five topics outlined above. These themes reflect common transport issues raised by Otago residents and provide insight into potential priority areas for service improvements.

Panel recommendations on these themes are reflected in the table in Section 9.1 of this report.

7.1 Network design and levels of service

Most submitters want improvements to our public transport services.



Service reliability, punctuality, frequency, timetables and routes were the most common themes raised by submitters. The draft RPTP speaks to reliability and punctuality in Section 2.7 and frequency, timetables and routes in Sections 5.1 and 5.2.

Feedback included requests for buses not to run early, more frequent bus services, extended service hours, and network changes/alterations to bus routes. These submission points illustrate that most submitters value a convenient and well-designed public transport service.

The following table outlines staff recommended changes to the draft RPTP in response to this feedback and reasons behind those changes.



Sub-topic	Staff recommendation	Staff reasoning
Reliability	No changes to RTP – noting and/or operational	The importance of reliable buses is captured in the draft RTP's passenger experience focus area (Section 2.7). Good timetable design is a core principle of the network design chapter of the draft RTP (Section 5). However, some level of early and late running is unavoidable.
Frequency	No changes to RTP - noting	<p>General: Our plan emphasises enhancing our service's frequencies where required over time. However, the current funding environment limits our ability to make any of these frequency improvements in the short-term.</p> <p>Queenstown: Service improvements recommended in the Queenstown Public Transport Business case are included in the draft RTP and funded; we are seeking to implement these improvements.</p> <p>Dunedin: The draft RTP gives emphasis to improving frequencies in line with the Dunedin Fares and Frequencies Business Case. However, the current funding constraints limit our ability to move forward with these in the short-term.</p>
Timetables	No changes to RTP - noting	<p>Our timetable design policies capture much of the timetable related feedback in the draft RTP (Section 5.2). These include policies to enable seamless transfers and accurate running times, where possible.</p> <p>For feedback requesting service hour extensions, we state longer service hours as a target in the draft RTP, however we caution that we are limited in what we can achieve in this area in the immediate future due to funding constraints.</p>
Routes	No changes to RTP - noting and/or operational	<p>Most route-related feedback will be noted and passed to network planning and operational processes, but none will result in changes to the draft RTP.</p> <p>The next three years of route changes are largely determined and funded, and therefore already included in the draft RTP (Section 5.2). Many requested route changes are included as 3+ year aspirational, or unfunded, changes. While route changes not currently in the draft RTP have the possibility of being implemented in 3+ years, we will not alter our network aspiration maps to include them.</p>



7.2 Regional connectivity

People want public transport for Otago’s smaller towns and rural areas.

Many submitters advocated for ORC to provide public transport services to Otago’s smaller towns and rural areas.

This sentiment is captured throughout the draft RPTP, for example, in the opening statement (p. 4), in the community transport section (pp. 37 and 38) and in the maps illustrating network aspirations for rural areas (p. 59).

Locations that garnered the strongest demand for new services include the Dunedin Airport, Wānaka/Upper Clutha and Ōamaru. Demand was often justified with the following reasoning:

- Submitters often cited that the Dunedin Airport is the only major-city airport in the country not served by public transport. This is not true, however, as the Hamilton airport is not currently served by public transport.
- Submitters requested public transport services connecting Wānaka and Upper Clutha towns, including a Wānaka to Queenstown bus service.
- Most submitters mentioning Ōamaru requested a bus service from Ōamaru to Dunedin, primarily to access hospital appointments. Some submitters requested public transport within Ōamaru, including an on-demand service.

Other locations that received notable demand for public transport include Balclutha, Central Otago and Outram.

Some submitters requested that Otago’s smaller towns and rural areas be connected by passenger rail.

Topic	Staff recommendation and reasoning	Staff reasoning
Dunedin Airport	No changes to RPTP - noting	A Dunedin to Balclutha service is included as an integral service in the draft RPTP and would serve the airport, but is not currently funded.
Wānaka/Upper Clutha	No changes to RPTP - noting	Public transport links between Wānaka and Queenstown are outlined in the draft RPTP for improving regional connectivity, however currently sits in the 10-30 year horizon due to lack of funding and alignment with central government priorities.
Ōamaru	Change to RPTP	A local Ōamaru service was left off integral services table in error (a Dunedin to Ōamaru service was included) The local Ōamaru service was signalled in the RLTP but was not funded.



		Future funding and timing to implement this service is currently unclear.
Rail and ferries	No changes to RPTP - noting	We do not currently have the evidence base to support regional rail and other non-bus transport modes, but staff acknowledge that there is community support to look for alternative ways to improve connectivity and access for smaller towns.

7.3 School services

Submitters want assurance that students will have reliable public transport options.

Submitters frequently requested that public transport accommodate school children on their commutes to and from school. They cited affordability, safety and reliability as key issues for school children.

While some submitters raised concerns about who would provide public transport services (Ministry of Education or ORC), most submitters cared more that the service was being delivered reliably and affordably.

Some submitters requested school services be separate from the public transport services, such as Ministry of Education services, while others requested more public services be added. Common areas of concern were students commuting around the Otago Peninsula and South Dunedin, as well as the high-growth areas of Queenstown.

Staff think that submissions related to school services may have been driven by the recent removal of the Ministry of Education dedicated school transport services on the Otago Peninsula and the Ministry's current review of school bus services in the Whakatipu basin. ORC staff have been working collaboratively with the Ministry of Education to coordinate an effective transition for students onto the ORC network where possible when removal of these services is programmed.

Staff recommendation	Staff reasoning
No changes to RPTP - noting	<p>The draft RPTP includes a new policy with regards to targeted services such as school buses. Although we aim to serve trips on our integrated all-day services where possible, targeted services may be provided where they serve trips that cannot reasonably be made through other regular services.</p> <p>Ministry of Education services are not regulated by ORC, but we acknowledge they form an important part of the public transport system; the removal of such services is a risk across our networks, especially in Queenstown; and could also be a risk to ambitions for a local Ōamaru service.</p>



	<p>In Queenstown, planned improvements to frequencies under the Queenstown Business Case will improve services for many users, including primary school students, noting the improvements are not dedicated bus services, but public transport services that intend to provide additional capacity for all passengers.</p> <p>In Dunedin, there are many factors that influence existing timetables and we cannot meet all needs perfectly. School travel is a significant part of the demand for travel, and staff acknowledge that there are some issues with capacity which are continuously being assessed.</p>
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7.4 Electric Buses

Electric buses are popular, with some reservations.

Electric buses were a common feedback topic in submissions. Most comments on electric buses were positive, with submitters praising the environmental sustainability and comfort of the buses. A small number of submitters criticised the transition to electric buses, however, citing the environmental implications of sourcing the vehicle batteries.

Sections in the draft RPTP related to electric buses include Section 2.7 (Service and vehicle quality standards) and 4.2 (Decarbonising our bus fleet and related infrastructure).

Staff recommendation	Staff reasoning
No changes to RPTP – noting	<p>While public transport fleet decarbonisation aligns with the ORC Strategic Direction’s climate aspirations and goals, it is also required by central government. The NZTA Requirements for Urban Buses (RUB) allows only zero-emission public transport buses to be purchased from 1 July 2025.⁵ Although there remain some open questions, the best information currently available points to battery-electric buses as the best way to serve our current needs in most cases.</p> <p>Submitters also raised cost as an issue. Our recent experience does not support this; new electric-bus contracts are increasingly cost-competitive.</p> <p>Environmental impact: NZTA’s Zero emission bus economics study⁶ indicates that intensively used battery-electric buses perform best on a whole-of-life emissions basis, including embedded carbon.</p> <p>Safety: we have no evidence of significant concerns about the safety of electric buses compared to diesel buses.</p>

⁵ <https://www.nzta.govt.nz/assets/resources/requirements-for-urban-buses/docs/requirements-for-urban-buses-2024.pdf>
⁶ <https://www.nzta.govt.nz/resources/research/reports/718/>



	Electrical grid capacity: we do not currently have any major concerns
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7.5 Vehicle size

Many people believe our services would benefit from using smaller buses.

Many submitters suggested that ORC introduce smaller buses during off-peak hours to cut operation costs and improve manoeuvrability on narrow roads.

Staff recommendation	Explainer
<p>Change to draft RPTP</p> <p>To address this common submission theme, we recommend adding an explainer on small buses to Focus area 4 of the draft RPTP.</p>	<p>What about using smaller buses?</p> <p>One common suggestion is to use smaller buses during off-peak hours in Dunedin and Queenstown. Smaller buses could be helpful in hilly areas or on routes that have low patronage. However, there are some barriers to introducing smaller buses in Otago:</p> <p>1. Smaller buses are often not more cost-effective: The largest expense in public transport is driver wages. While smaller buses may save money due to lower fuel consumption, those savings are offset by the fixed cost of driver wages, as drivers must be paid regardless of the size of the bus. Smaller buses also accommodate fewer passengers, which means less fare revenue. Additionally, investing in a new fleet of smaller buses would be costly and inefficient, as many of our current buses would sit idle and unused.</p> <p>2. Smaller buses won't meet our future growth demands: In 2024, we had a record-breaking number of people taking public transport in Otago, and we hope to build on these successes moving forward. As our region grows, smaller buses might struggle to accommodate higher passenger demand and contribute to overcrowding on our services.</p> <p>3. We want to use the right tools for the job: Bus size isn't a black and white issue—it's a question of finding a good balance. We want public transport to empower people to travel to many places in a reasonable amount of time and at a low cost. To achieve this goal, we'll choose the fleet that's right for the job.</p> <p>In July 2025, we will introduce smaller buses in Mosgiel to replace routes 80 and 81. These buses will be part of an 'on-demand' bus service that uses a small, 30-person capacity, wheelchair accessible electric bus to pick people up and drop them off within a designated area in</p>



	Mosgiel. People can book the bus by calling a phone number or through an app. This initiative is just one example of how we are using the best transport option to meet community needs.
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8. Other considerations

8.1 SuperGold

At the 5 March 2025 PATC, Council recommended that the SuperGold Bee Card concession continue to apply on the 3:35PM City—Palmerston service and the 3:40PM City—Warrington service, with a final decision to be made as part of decisions on the new Otago RPTP. This recommendation can be found as Resolution PAT25-105.

Six submissions on the draft RPTP provided feedback about the SuperGold concession.

Staff response

SuperGold is a national scheme with free travel between off-peak periods set by NZTA. If we were to recommend extending free travel periods for SuperGold users, this would not attract co-funding or align with our requirements to increase private share. Therefore, this is not something staff consider they can support.

NZTA Development guidelines for regional public transport plans 2024 states that “PTAs must ensure any regionally defined concessions (including SuperGold) do not duplicate or conflict with a nationally-defined fare concession. This is to ensure an enhanced and consistent experience for customers and reduce administrative costs”.

To extend the hours in which we offer SuperGold concessions would contravene this policy, not attract co-funding and put our relationship and funding support from NZTA at risk.

Further, it is not good practice to have one-off policies for certain services. If we are to extend the hours of SuperGold concession on these services, we would need to make this consistent across all services leaving the city at a similar time.

Staff recommendations

Staff do not recommend Council extending the free travel period for SuperGold users on the 3:35PM City—Palmerston service and the 3:40PM City—Warrington service, or any other service out of off-peak.

Panel recommendations

The Panel accepts the staff recommendation to not extend the free travel period for SuperGold users on the 3:35PM City—Palmerston service and the 3:40PM City—Warrington service or any other service out of off-peak. SuperGold concessions will continue to be available during off-peak. The Panel recommends the change be made at the same time as the base fare change (Q1 2025/2026)

Cr Weir moved and Cr Noone seconded (carried).



8.2 Private share targets

A Private share of operating costs paper was presented to Council at the 19 February 2025 meeting. Council resolved that Council:

1. Approves advising NZTA Waka Kotahi that fare changes, including changes to adult fares or the introduction of fare zones will be consulted on as part of the RPTP, and formal reporting of private share targets and projections will be provided to NZTA by 30 June 2025, after the RPTP process has concluded. [Resolution CM25-114]
2. Notes the requirement to increase private share funding of public transport services and the initial private share targets advised by staff to NZTA officials, which are to be confirmed through the RPTP process. [Resolution CM25-115]

The submission from NZTA was the only submission that directly mentioned private share targets.

Staff response

Given the technical nature of setting and agreeing private share targets, it is unsurprising that few submitters engaged directly on this topic.

The implications of RPTP decisions on private share are discussed throughout this document.

What is becoming apparent is the ability to grow private share in a linear fashion will be challenging. Fare mechanisms and efficacy of spending are still the main levers we have to influence private share. Growing fare paying patronage will have the greatest impact on our ability to meet our proposed private share target which aligns with the RPTP.

Staff recommendations

While submissions give little reason to amend the targets, staff have considered a range of factors in determining recommendations to the Panel.

Bringing together the other aspects consulted on as part of the RPTP including increasing the Bee Card fare to \$2.50 and child/youth concession to \$1.50, staff recommend as follows:

- NZTA proposed targets were 24% for 2024/25, 30% for 2025/26 and 42% for 2026/27
- Agreed staff level proposed targets for inclusion in the RPTP were 20% for 2024/25, 25% for 2025/26 and 30% for 2026/27
- Based on modelling to reflect the increase in revenue from proposed fares increases to adult \$2.50 and child fares to \$1.50, staff estimate private share of 19.7% for 2024/25, 22% for 2025/26 and 23.8% for 2026/27
- Therefore staff recommend amending the private share targets to 20%, 23% and 25% respectively.
- This is based on the assumption of using fares as our only certain means to influence private share in the short term
- We note further that achieving these targets relies on decisions on the use of a future zonal fare structure and realising advertising and commercial revenue opportunities.



Panel recommendation

The Panel supports the staff recommendation and recommends amending the private share targets to 20% for 2024/25, 23% for 2025/26 and 25% for 2026/27. This recommendation is based on proposed fare increases to adult \$2.50 and child and youth fares to \$1.50, and a future zonal fare structure.

Note: The Panel notes that staff will continue to actively engage with NZTA on setting and reviewing private share targets.

Cr Wilson moved and Cr Noone seconded (carried).



9. Recommended changes to the draft RPTP

9.1 Recommended changes in response to submissions

The table below outlines the recommended changes to the draft RPTP in response to submissions received.

ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
01	12	General	<p>pg 12, 1.4: This section should be amended to reflect the following (especially that NZTA has a role to oversee PT nationally and how significant NZTA's investment is): The NZTA is required to contribute to an efficient, effective and safe land transport system in the public interest (section 95 (1) (a), Land Transport Management Act 2003 [LTMA]). Our functions include:</p> <ul style="list-style-type: none">• overseeing the planning, operation, implementation, and delivery of public transport (including issuing guidelines for regional public transport plans; section 95 (1) (i), LTMA); and• managing funding of the land transport system (section 95 (1) (j), LTMA). <p>In this regard, NZTA is the largest single investor in public transport in Otago alongside its partner Council; ORC. In the 2024/27 period, ORC will rate its community \$58.2m to invest in</p>	<p>At a national level, NZTA invests in public transport services and infrastructure through the NLTP and shapes the transport system through strategic frameworks and the GPS on land transport.</p>	<p>Change last paragraph of text on pg 12 to 'At a national level, NZTA shapes the transport system through strategic frameworks and the GPS. They also oversee the planning, operation, implementation, and delivery of public transport (including issuing guidelines for regional public transport plans) and managing funding of the land transport system).'</p>	Accept



ID	Page no.	Topic	Summary of feedback/request	Current draft RTP content	Proposed change	Panel decision
			public transport and in partnership, NZTA will co-invest about \$60m.			
02	22	Bus drivers	pg 22, 2.2: Emphasise the importance of driver safety and working conditions, including how ORC may want to use driver fund to support driver safety and working conditions.	collaboration with service operators to ensure the highest standard of passenger and driver safety on board vehicles (see Section 2.7).	Pg22 2.2 amend last bullet point of first column to read "collaboration with service operators to ensure the highest standard of passenger and driver safety, and driver working conditions"	Accept
03	23	Bikes on buses	pg 23, 2.3, Footnote 3: Delete the second sentence as this issue has been resolved.	Non-foldable bikes can be attached to the bike racks fitted on the front of buses. In 2024, NZTA implemented a temporary restriction on bike racks on buses. Visit orc.govt.nz/orbus/ for the latest information about using bike racks on buses.	Remove reference to temporary restriction of bike racks on buses.	Accept
04	17, 19	Focus areas	(Focus area) Passenger experience: Provide public transport services that promote social inclusion and respect the safety and wellbeing of all passengers.	Focus area 1: Passenger experience Objective: Provide useful public transport services that respect the safety and wellbeing of passengers, particularly for transport-disadvantaged people.	Change Objective 1: Passenger experience to 'Provide useful public transport services that promote social inclusion and respect the safety and wellbeing of all passengers' Change needed on Pg 17, and 19. Remove the definition of 'transport disadvantaged' from the last bullet points on pg 19.	Accept
05	17, 45	Focus areas	(Focus area): Environmental sustainability: Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports	Focus area 3: Environmental sustainability Objective: Invest in a public transport system that promotes the best possible environmental outcomes regarding greenhouse	Change Objective 3: Environmental sustainability to: Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and	Accept, but replace "reliance" with "dependence"



ID	Page no.	Topic	Summary of feedback/request	Current draft RTP content	Proposed change	Panel decision
			sustainable urban planning and development	gas emissions, pollutants and land use.	development. Changed needed on pg 17 and 45	
06	17, 45	Focus areas	More focus on making it easy to live without a car	Focus area 3: Environmental sustainability Objective: Invest in a public transport system that promotes the best possible environmental outcomes regarding greenhouse gas emissions, pollutants and land use.	Change Objective 3: Environmental sustainability to: Invest in a public transport system that reduces reliance on private vehicles, promotes positive environmental outcomes and supports sustainable urban planning and development. Changed needed on pg 17 and 45	Accept, but replace “reliance” with “dependence”
07	24	Customer service	pg 24, 2.3, CS A4: Support the policy but suggest the inclusion of the words “(of NZTA standard)” are superfluous (the survey is a requirement of the NZTA Procurement Manual) and may limit Council undertaking a more comprehensive survey.	CS A4 Undertake a public transport customer satisfaction survey (of NZTA standard) on an annual basis.	Remove (of NZTA standard) from CS A4	Accept
08	27	Funding	pg 27, 2.6, Case study: Use of the phrase “financially viable for ORC” suggests that the fare revenue generated covers the costs of the additional services. If not, remove the reference.	The success of our cruise ship-targeted services highlights the potential for special event travel to bring positive social outcomes to the community while0 being financially viable for ORC.	pg27 Case study. Change last paragraph to read: 'The success of our cruise ship-targeted services highlights the potential for special event travel to bring positive social outcomes to the community. '	Accept
09	28	Operations	SE A2 Requests clearer phrasing that extra services would be added to existing routes for special events	Where funding for targeted public transport services is secured by event organisers, support special events by:	Where funding for targeted public transport services is secured by event organisers, support special events by: <ul style="list-style-type: none">contracting and managing service provision on behalf of event organisers	Accept



ID	Page no.	Topic	Summary of feedback/request	Current draft RTP content	Proposed change	Panel decision
				<ul style="list-style-type: none">contracting and managing service provision on behalf of event organisersproviding discounted fares to use on the existing public transport networkundertaking promotional/marketing activities.	<ul style="list-style-type: none">providing discounted fares to use on the existing public transport networkundertaking promotional/marketing activities. <p>Where possible, event services should be branded and run as extra trips on the existing network; in some cases, services may run on bespoke alignments</p>	
10	30	Customer service	Requests change of phrasing in SQ A4 to be "security and customer staff"	Security staff at additional interchanges and on services...	Security and customer service staff at interchanges and on services...	Accept
11	34	Accessibility	pg 34, 2.8, Table 2, ORC interpretation: Oppose the interpretation that "steps 2 and 4 will be interpreted in light of a person's ability to board a kneeling bus from ground that is the same height as the ground under the bus." The current ORC interpretation seems to assess the ability of a customer to step up in to a bus (which RUB Requires to have a flat floor), making no allowance that buses have front entry ramps that can be extended to footpaths. It also means anyone in a wheelchair is automatically eligible for TM. The RUB requires vehicles to have	When applied to mobility impairments, steps 2 and 4 will be interpreted in light of a person's ability to board a kneeling bus from ground that is the same height as the ground under the bus.	Remove last paragraph of text in the General Eligibility box - ORC interpretation pg34	Accept



ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
			sufficient ground clearance to permit the body of the vehicle to pass over a Kassel kerb without making contact with the kerb (these kerbs are 180mm high above the road) and the kneel height at the front door is to be between 245–280mm. At most therefore, a customer would be required to step up 100mm if no ramp was deployed.			
12	35	Funding	pg 35, 2.8, Examples: The funding splits shown in the examples are wrong, generally over-stating the local share contribution.	<p>Figure 6: Total Mobility trip funding examples and breakdown.</p>	Update figure 7 with edits provided in Section 11 of this report	Accept
13	36	Accessibility	pg 33, Total Mobility: The RPTP guidelines require the RPTP to "as a minimum ... include policies specifying: <ul style="list-style-type: none">any regional fare caps and their process for review (couldn't see anything about how fare caps will be reviewed)policy for enabling hoist-equipped vehicles (contained in	TM P3 Operator and agency eligibility: develop standardised frameworks to assess the eligibility of potential and existing transport operators and mobility agencies in a way that serves disabled people with a diverse range of needs and maintains good value for money.	Amend TM P4 Affordability (pg36) to remove the words 'for passengers' so it reads: Affordability: investigate potential barriers to Total Mobility's affordability, including the \$37.50 fare subsidy cap, subject to financial viability and the outcome of the central government's Total Mobility review. Delete Action TM A5 and replace with:	TM A1 amend "comprehensively" to "comprehensive" Accept otherwise



ID	Page no.	Topic	Summary of feedback/request	Current draft RTP content	Proposed change	Panel decision
			TM P5) • eligibility requirements for admitting or removing transport providers from participating in the Total Mobility Scheme." (Plan seemed silent on this.)	TM P4 Affordability: investigate potential barriers to Total Mobility's affordability for passengers, including the \$37.50 fare subsidy cap, subject to financial viability and the outcome of the central government's Total Mobility review. TM A1 Ensure that reasonable and actionable measures are taken to ensure operators and agencies meet their contractual obligations, including comprehensive auditing of vehicles, training, and health and safety. TM A2 Develop an operator and agency contract procurement process to reduce barriers to entry, promote transparency and resourcing, and enable wider geographic coverage for eligible operators and agencies. TM A5 Review the current \$37.50 fare subsidy cap as a potential barrier to accessibility. Collaborate with other regions to understand the impacts on user behaviour and expenditure a higher fare cap would have.	'Review Total Mobility fare subsidies periodically in line with Annual Plan and Long-Term Plan processes'. Amend TM P3 to read: Procurement: Total Mobility will be procured in accordance with the NZTA Procurement Manual and ORC's Transport Activities Procurement strategy, and adhering to guidance set out in NZTA 'Total Mobility Scheme: a guide to local authorities, with a focus on access and value for money. Amend TM A1 to read: Take reasonable and actionable measures to ensure operators meet their eligibility and contractual obligations, including comprehensively auditing of vehicles, claims, training and health and safety. Amend TM A2 to read: develop a standardised operator and agency contract procurement process to reduce barriers to entry, promote transparency, and resourcing in a way that serves disabled people with a diverse range of needs while maintaining good value for money.	



ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
14	36	Funding	pg 36, 2.8, TM A5: Suggest ORC should look at its fare cap not just from the perspective of it being a barrier, but also how ORC can make the scheme more financially sustainable.	TM A5 Review the current \$37.50 fare subsidy cap as a potential barrier to accessibility. Collaborate with other regions to understand the impacts on user behaviour and expenditure a higher fare cap would have.	Update TM A5 to 'Review Total Mobility fare subsidies periodically in line with Annual Plan and Long-Term Plan processes'	Accept
15	40	n/a	pg 40, 3.1, Equity principle 3: Is disinvestment the correct word as opposed to "under-investment" or "a lack of investment"? Disinvestment suggests there has been a withdrawal or reduction of an investment (which isn't the case).	3. Address historical disinvestment:	Pg 40. Change the third principle to 'Address lack of under-investment'	"Address lack of investment"
16	42	General		Relationships: strong relationships with Otago's diverse stakeholders are developed and maintained so public transport priorities and investments align with their needs and aspirations	Relationships: strong relationships with Otago's diverse stakeholders are developed and maintained so public transport priorities and investments align with their needs, interests, and aspirations	Accept
17	41, 60, 61, 122	Oamaru service	Request for a local public transport service in Oamaru, particularly so students can travel to school more easily.	n/a	Add a local Oamaru service to the integral services in the plan	Accept
18	42	Rail and ferries	p.42 Engage in open and regular dialogue with our partner agencies and key stakeholders to align expectations, identify and address inefficiencies and new	E A1 Engage in meaningful dialogue with diverse stakeholders interested in public transport to understand their transport needs.	Rephrase E A1 to slightly shortened version of submitter request: "Engage in open and regular dialogue with our partner agencies and key	Accept



ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
			transport opportunities and optimise the operation of our services		stakeholders to align expectations, identify and address inefficiencies and opportunities, and optimise the operation of our services."	
19	44	Collaboration with institutions	pg 44, Partner agencies: In recent years, ORC, DCC and NZTA have successfully collaborated to deliver significant improvements around Dunedin, such as Mosgiel Express services and improved Mosgiel peak services.	In recent years, ORC and Dunedin City Council have successfully collaborated to deliver significant improvements around Dunedin, such as: <ul style="list-style-type: none">• improving the safety and accessibility of bus stops in key locations including Princes Street, Dunedin Hospital, the tertiary area and Cargill's Corner• increasing the frequency of buses to Dunedin Hospital• enhancing bus route efficiency by implementing a primary bus corridor from Dunedin Bus Hub to South Dunedin.	Amend pg 44 first column last bullet point to: In recent years, ORC, DCC and NZTA have successfully collaborated.... Add bullet ' Mosgiel Express services and improved Mosgiel peak services'	Accept
20	52	General	pg 52, SD P4: This policy may not meet the requirements of the RPTP Guidelines which state: "Where a PTA provides, or intends to provide, on-demand public transport services, it must include objectives and policies within its regional public transport plan that: <ul style="list-style-type: none">• outline the use cases for which a PTA may deploy on-demand public transport• the accessibility standards that	On-demand services: in areas where fixed-route services are inefficient at providing coverage, on-demand services should be considered as an alternative. The following principles should apply to the use of on-demand services: <ul style="list-style-type: none">• The value of on-demand services should be evaluated on a like-for-like basis with cost-equivalent fixed-route alternatives.• Except when highly targeted in nature, on-demand services should	add the following bullet points to SD P6: <ul style="list-style-type: none">• On-demand services should be operated with fleet that comply with the Requirements for Urban Buses• Changes to on-demand services are based on the same principles as fixed-route services (see SD P4 above)	Accept



ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
			will apply to the scheme and vehicles utilised within the scheme • signal how on-demand public transport schemes may be adjusted in response to changing customer demand to promote good customer experience. This may include replacing the service or adjusting: - fares and payment methods - operating catchment - operating mode - hours of operation - eligibility to utilise the service" (section 4.2.8).	be integrated, as much as practical, into Orbus branding, fare payment and fare structures. • The impact of on-demand services on commercial small-vehicle markets should be considered in decisions to implement on-demand, especially with regards to Total Mobility operators.		
21	52	Rail and ferries	p.52 Mode neutrality: public transport will be delivered using the most appropriate mode (e.g. bus, ferry, tram, ropeway, etc.) to meet demand, purpose, community need and value for money	Mode neutrality: public transport will be delivered using the most appropriate mode (e.g. bus, ferry, tram, etc.) to meet demand, purpose, community need and value for money.	Add "cable/rope technologies" to examples of alternative modes in SD P5	Take out "tram", add "rail", otherwise accept
22	57	Table 4	Request from a number of submitters to include rail as a future mode in our plan.	Orange regional service types box does not include any reference to rail in the 'Our Aspirations' section	Add bullet point: Investigate the role of rail in delivering regional services	Replace proposal with "collaborate with key stakeholders to explore inter-regional public transport opportunities such as public buses, passenger rail, or code-sharing on exempt bus services"

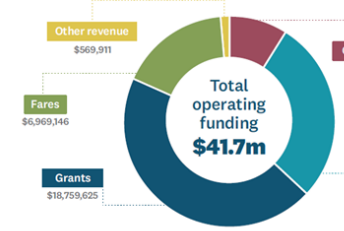


ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
23	58	Vehicles smaller	26 submitters requested us to consider using smaller buses.	n/a	Add the recommended explainer on small buses to the draft RPTP's Focus area 4 (such as at the bottom of page 58, after Table 4.) See the explainer in Section 7.5 of this report.	Accept
24	60	Network maps	Improve exempt service clarity	Regional next 10-year map	Change key from Integral exempt service to InterCity	Change to "Integral exempt (e.g. InterCity)"
25	60	Network maps	More granularity to future network aspirations	Regional next 10-year map	Split into two maps: 3 to 6 years and 6 to 10 years Notations to be developed and signed off by the Chair	Accept
26	60	Network maps	Accelerate introducing public transport services for Wanaka	Regional next 10-year map	Add Wanaka suburban integral service and Wanaka – Queenstown services to new 6-to-10-year map.	Accept
27	66	Network maps	More granularity to future network aspirations	Dunedin next 10 year map	Split into two maps: 3 to 6 years and 6 to 10 years Notations to be developed and signed off by the Chair	Accept
28	64	Rail and ferries	pg 64, 6-30 years: Didn't the ORC PT Business case discount a ferry to Homestead Bay?	Potential ferry to Homestead Bay.	Remove Homestead Bay leg from 6-30 year map. We don't currently have a case for this.	Accept
29	69	Regional connectivity	Various requests for regional services	NF P8 : transport solutions to improve connectivity for our smaller regional centres and communities will be prioritised and tailored for each community, matching need with the availability of resources and funding	NF P8: Transport solutions to improve connectivity for our smaller regional centres and communities will be prioritised according to: <ul style="list-style-type: none">● Potential level of usage	Accept



ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
					<ul style="list-style-type: none">Enhancing the connectivity of the existing regional networkThe community's willingness to pay (where NZTA co-funding is not available), e.g. through targeted rates, territorial authority contributions, fares, or private funding sources	
30	71	Active transport	pg 71, MM A4: Given policy MM A3, why is it Council's role to provide cycle parking (which has historically been a TA/RCA role)? Surely the provision of cycle parking is addressed by the previous policy.	MM A4 Provide cycle parking at strategic locations where there is evidence of demand to support greater access to the public transport network by alternative modes.	Remove MM A4	Instead of removing, change to "Advocate and identify opportunities for provision of cycle parking at strategic locations to support greater access to the public transport network by cycling."
31	71	Active transport	Request on p. 71 to remove the language around "choice" and replace it with a discussion of appropriate modes: active modes for shorter trips for those who are able, and public transport for the longest trips and for those unable to access other modes.	Pg 71 Paragraph 3 Our aim is for active transport to be the preferred mode for short journeys in our urban areas.	Change the first sentence of paragraph 3 on pg 71 to read: 'Our aim is for active transport to be the preferred mode for short journeys in urban areas for those who are able.	Accept
32	80	Focus areas	Thinks the Value for Money section does not adequately consider the wider community benefits of public transport	n/a	Add a 'Benefits' heading before the last three paragraphs of pg 80.	Reject – does not work structurally



ID	Page no.	Topic	Summary of feedback/request	Current draft RTP content	Proposed change	Panel decision
33	82	Funding	pg 82, Figure 13: Replace "Grants" with "NLTF/Crown". This will be more transparent and make it clear to the reader where the funding actually comes from.	<p>Otago public transport funding 2024/25</p>  <p>Figure 13: The distribution of public and private funding for Otago's 2024/25 public transport operation.</p>	Figure 13 Pg 82. Change the label 'Grants' to 'NLTF/Crown'	"Central government" instead of "NLTF/Crown"
34	84	Fare policies	Request on p. 85 to change F P2: add "off-peak use incentive" to the list of fare structure elements	n/a	Add 'off-peak use incentive' to the bottom of F P2, page 84	Accept
35		Active transport	Link regional services to bike trail hubs	n/a	Check if any policies could be amended to reference this explicitly?	Reject – this should go within a Public and Active Transport Connectivity Strategy
36	83	Collaboration with institutions	Request for increasing parking fees and introducing road user fees to subsidise public transport and induce mode shift.	FS A2 Collaborate with our partner agencies to coordinate and align parking strategies and other travel-demand management tools to improve the value of public transport and achieve wider regional carbon-reduction and mode-shift outcomes.	Improve language or policies around congestion pricing [details to determine]	Change FS A2 to "Collaborate with our partner agencies to coordinate and align parking strategies, time of use charging, and other travel-demand management tools to improve the value of public transport and achieve wider regional carbon-



ID	Page no.	Topic	Summary of feedback/request	Current draft RPTP content	Proposed change	Panel decision
						reduction and mode-shift outcomes.”
37	32	Bikes on buses	Bike racks to take more than three bikes	Vehicle standards (ORC requirements): through procurement of vehicles, assignment of vehicles to trips, and ongoing collaboration with operators, the fleet should support safety and good passenger experience in the following areas: [...] • Universal availability and safety of external bike racks	n/a	Accept current language. This is covered by existing policy VQ P2.
38	84	Fare policies	Fare capping	The structure may include the following elements: [...] • Fare capping: weekly and daily costs are capped to reward regular use.	n/a	Accept current language. Investigate further along with other structure decisions.
39	70	Routes	Refer to DCC’s written submission for more details of the network review requirements. DCC staff consider this to be a route-by-route network optimisation process to align infrastructure upgrades and footpath improvements across the network.	NF A6 Periodically review the design and configuration of services, considering factors such as: • Performance of services • Their adherence to network design principles, prioritising a patronage-oriented network • Contractual cycles • Land use changes (including location of key services and destinations)	Suggest we change NF A6 to NF P7 with rephrasing into a policy rather than an action using the specifies triggers for network review or optimisation. Similar to FP P6 on pg 85.	Move and reword NF A6 to become NF P7. First line should say “The design and configuration of services will be periodically reviewed, considering factors such as...” [continue existing bullet points]



ID	Page no.	Topic	Summary of feedback/request	Current draft RTP content	Proposed change	Panel decision
				<ul style="list-style-type: none">• Travel behaviour patterns (e.g. working from home)• Change in the legislative, regulatory, and funding environment of public transport. Service reviews may be restricted to a small geographic area (such as a small number of suburbs) or broader (at a network level). Where a service review covers central areas of a network, such a review should include consideration of strategic infrastructure such as interchanges, which could have a significant impact on service design.		

Panel recommendations

The Panel recommends the changes outlined in the ‘Panel decision’ column in the table above.

Cr Wilson moved and Cr Weir seconded (carried).



9.2 Minor editorial changes

The table below outlines recommended minor editorial changes to the draft RPTP, such as typographical errors, grammatical corrections and design/layout that have been picked up since the draft RPTP was approved for consultation. These changes do not alter the meaning or substance of the content, and we propose that these changes be made as required without the need for further review.

ID	Page no. (Designed document)	Section	Proposed change
51	12	1.4	Last paragraph. End the paragraph with GPS , removing 'on land transport'. GPS is the acronym for the full document.
52	20	2.1	Exempt service info paragraph - end of second sentence. Inter C ity needs a capital C.
53	29	2.7	Text in paragraph at top of second column. Add the word 'the' to read 'roadworks or at certain times of the year..."
54	30	SQ A2	Remove the word 'In' from the beginning of the Action and add the word 'to' so it reads 'Work with service operators to implement the following..."
55	30	SQ A4	Check capitalisation of bullet points. Should these ones be lower case, similar to SQ A1?
56	31	2.7	In "They focus on ensuring public transport vehicles are" Change "they" to " The RUB ".
57	35	2.8	Correct Figure 7 (Total Mobility trip funding examples and breakdown). See corrected figure in Appendix B of this report.
58	40	2. Access	Principle box number 2 in the middle. Should the r in residents be a capital R? I think I see why it is in lower case, but it looks funny when ORC is capitalised in the other two boxes.
59	56	Table 4	Urban Rapid service Key Characteristics box, third bullet point - change to 'Travel times competitive or even faster than private car.'
60	57	Table 4	Regional service types box/Our current services/4th bullet point - Inter C ity should be capital C not lower case.
61	62	5.2	Change "No direct route from Queenstown to Arrowtown" to "Queenstown to Arrowtown connection via Frankton only"



62	64	5.2	Change "Missing road connections such as Quail Rise are filled in, allowing more direct routes" to "Missing road connections such as Quail Rise western access road are filled in, allowing more direct routes"
63	68	NF P2	Fourth bullet point beginning 'urban and regional.... This sentence should not be bullet pointed, it is a paragraph and the two final bullet points sit under it. Please remove the bullet point, indent and start with a capital U
64	68	NF P4	The text in this box is duplicated with NF P5. Please correct NF P4 to: 'Exempt services: Exempt service applications will be assessed and LTMA requirements followed. ORC will not support the registration of services that would undermine the performance of an existing contracted service. ORC will support the development of exempt services that deliver a part of the regional network not currently operated by contracted services. ORC may, in coordination with operators, promote exempt services that contribute to the region's public transport network'.
65	70	NF A6	Should the bullet points in this policy be lower case to be consistent with convention through the document?
66	77	IN P1	End of first sentence refers to Table 9. This should be Table 8 . While the final paragraph refers to Table 9, this is correct.
67	78	IN P5	Should the bullet points in this policy be lower case to be consistent with convention through the document?
68	79	5.5	Fourth paragraph needs to end with 'especially in Queenstown.' And the last sentence in this paragraph (Parking is complex....) needs to be at the start of the 5th paragraph.
69	83	FS P4	Should the D in 'Develop' after Third-party funding: be lower case to be consistent with formatting of bullet points throughout?
70	105	Appendix E	"These stories will play a crucial role in shaping the policies and actions that form the foundation of the ORC Regional Public Transport Plan 2025-2035." Change 'ORC' to ' Otago ': "...the foundation of the Otago Regional Public Transport Plan 2025-2035."
71	117	2nd row	Second Column change Intercity / Great Sights to Inter C ity with a capital C.



72	122	Glossary	Add after 6:30pm to off-peak hours definition so it reads " Weekdays 9am to 3pm and after 6:30pm, weekends and public holidays."
73		Throughout	Check use of hyphen in Queenstown-Lakes District. Hyphen seems to be missing throughout the document but it was my understanding that Queenstown-Lakes should have a hyphen.
74	71	5.3	Remove the word 'public' in from of 'premium public transport stops'. It should read "(e.g. dedicated cycle parking at premium public transport stops)."

Panel recommendations

The Panel recommends accepting the minor editorial changes outlined in the table above.

Cr Noone moved and Cr Weir seconded (carried).

9.3 Other general recommendations:

The Panel strongly recommend the actions and aspirations in the RTP are funded and implemented.

The Panel recommends a staff undertake a review of the Total Mobility Scheme fare subsidies. The Panel notes the ongoing Ministry of Transport review of the Total Mobility Scheme and recommends staff do not begin a review until the outcomes of the Ministry’s review are known. While funding deficits may force a review and decision to be taken ahead of this time, the Panel supports certainty for Total Mobility users.

The Panel supports inclusion of a smaller bus explainer in a future marketing/promotion campaign.

Cr Weir moved and Cr Noone seconded (carried).



10. Appendix A: Submission topic descriptions

Staff have categorised all submission points by topic for ease of the Panel's review and decision-making. The topics are defined as follows:

Active transport: requests to integrate public and active transport networks at the local and regional scale.

Bikes on buses: requests to reinstate bike rack use on buses in response to the nation-wide ban from November 2024 to April/May 2025.

Bus drivers: all feedback, positive and negative, related to public transport driver behaviour, such as driving practices, customer service, etc.

Bus priority: requests to implement bus priority infrastructure, such as bus lanes. This would require collaboration with territorial authorities.

Bus stop infrastructure: feedback on bus stop infrastructure, such as requests for shelters at stops.

Capacity: feedback related to at- or over-capacity services.

Central Otago service: requests for public transport (beyond community transport) in Central Otago.

Clutha service: requests for public transport (beyond community transport) in Clutha.

Collaboration with institutions: requests related to collaborating with partner agencies and institutions to improve public transport and roading networks. This includes territorial authorities, road controlling authorities, hospitals, large employers, etc.

Community transport: feedback related to ORC playing a role in supporting community transport services (prompted by a question in the submission form).

Dunedin Airport service: requests for public transport to the Dunedin Airport.

Dunedin bus hub: feedback related to the Dunedin bus hub. Main concerns include safety and infrastructure.

Fares base fare: feedback related to the proposed base fare increase to \$2.50 (prompted by a question in the submission form).

Fares concessions: feedback related to concession fares. Main concerns include the proposed child and youth fare concessions (prompted by a question in the submission form).

Fares local/tourists: a wide variety of requests to change fare structure to enable locals and visitors to pay different fares.

Fares zones: feedback related to the proposed zone fare structure (prompted by a question in the submission form) and general commentary on zone fares.

Focus areas: feedback on the draft RTP's proposed focus areas and priorities (prompted by a question in the submission form).

Frequency: requests to change service frequency, mainly to increase it.



Funding: feedback on funding strategies and sources to meet the cost of public transport and the central government’s private share targets.

General: miscellaneous or multi-topic feedback, including praise.

Marketing, promotion, engagement: feedback on ways to market, promote, and engage on our services with the public and key communities.

N/A: Used to note submitters that just answered the survey questions.

Oamaru service: requests for public transport (beyond community transport) in Oamaru, including a Dunedin-Oamaru service.

Operations: operational feedback not meaningfully relevant to the draft RPTP.

Pets on buses: requests to reduce, maintain and increase the ability for passengers to travel with pets.

Public information: feedback on the public information for public transport services, including exempt services (e.g. Intercity). Moderate overlap with the marketing, promotion, engagement category.

Queenstown-Lakes: requests for public transport in areas of the Queenstown-Lakes District without public transport, such as including Kingston and Glenorchy.

Rail and ferries: requests to utilise other transport modes, mainly rail and ferries, for our current and future services.

Regional services: feedback related to public transport services (beyond community transport) being introduced to areas beyond Dunedin and Queenstown. For feedback related to the most high-demand areas for new services - Central Otago, Clutha, Dunedin Airport, Oamaru and Upper Clutha, Queenstown Lakes - see their specific category.

Reliability: feedback related to reliability, punctuality.

Routes: feedback related to altering routes and stop locations.

Safety: feedback related to safety and security concerns, overlap with the Dunedin bus hub and school services categories.

School services: feedback involving public transport for school children, including Ministry of Education buses, separate public transport services for schools, altering routes for better school service, etc.

SuperGold: feedback related to SuperGold concessions

Ticketing system: feedback involving the current Bee Card and future Motu Move ticketing system, including payment and top-up options.

Timetables: feedback involving timetables, including the extension of service hours and shortening/lengthening timetables to improve service.

Upper Clutha service: requests for public transport (beyond community transport) in Wanaka/Upper Clutha, including a Wanaka-Queenstown service.

Vehicles electric: feedback related to electric buses.

Vehicles smaller: feedback involving smaller buses. Often discussed alongside increasing frequency and electrifying buses.

Commented [RH1]: Can you add the full definition of Queenstown Lake here please

Commented [GL2R1]: Amended



Wayfinding: feedback involving wayfinding, including real-time tracking, the Transit app and public information at bus stops. Overlaps with the public information category.

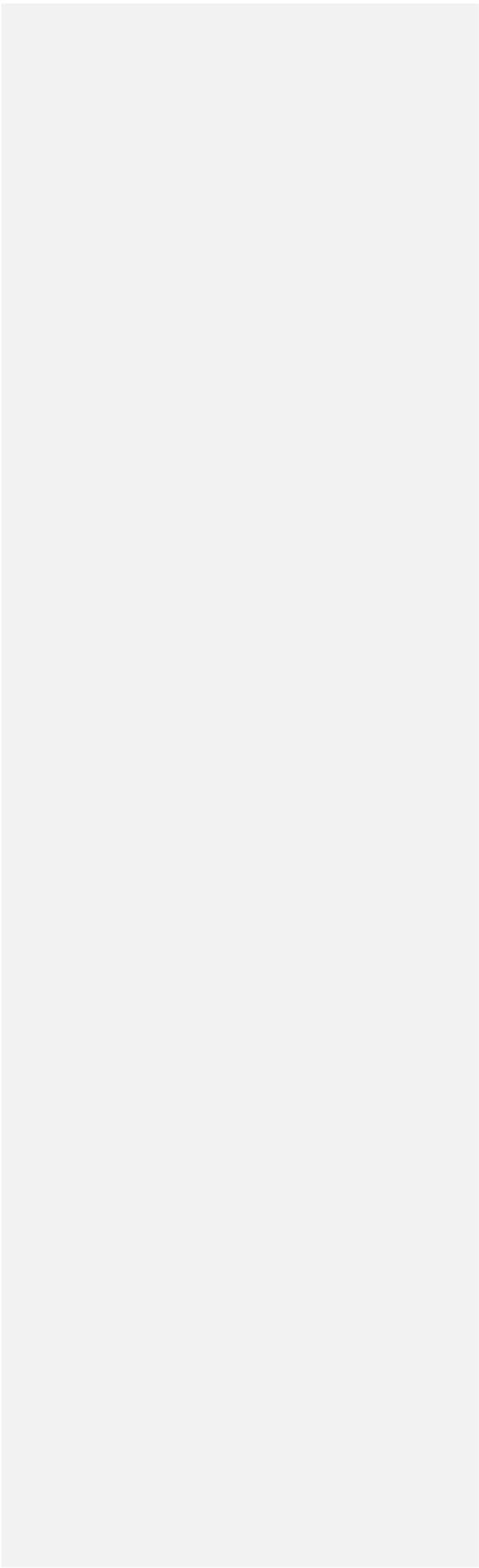


11. Appendix B: Corrected Figure 7: Total Mobility trip funding examples and breakdown

Total mobility trip funding examples



Otago Regional Public Transport Plan 2025-2035



Orbus: we'll get you there

Accessible, connected, easy

ORC's transport aspiration guides this plan:

Otago has an integrated transport system that contributes to the accessibility and connectivity of our community, reduces congestion and supports community wellbeing aspirations.



Otago has two strong performing urban public transport networks in Dunedin and Queenstown. We aim to continue to enhance these networks, while also pursuing options to do better for our smaller communities.

We are focused on delivering a system that is reliable, attractive, accessible and supports our region's carbon reduction goals. This plan aims to drive increased patronage through providing public transport solutions that are easy to understand and meet communities' diverse needs. In short, public transport people **want** to use – more often.

At the same time, we must delicately balance value for our passengers, funders, and community as we navigate a challenging operating environment. This plan is about finding the balance to deliver practical public transport solutions that serve our future well.

Contents

Part 15

1 Overview5

1.1 Why is public transport important?6

1.2 Why do we need a Regional Public Transport Plan?6

1.3 How does this RPTP fit within the wider strategic context?.....7

1.4 An overview of Otago’s public transport system.....9

1.5 Challenges and opportunities14

1.6 Our key priorities in this RPTP15

Part 217

2 Focus area 1: Passenger experience17

2.1 Public information18

2.2 Safety19

2.3 Customer service.....20

2.4 Ticketing system.....22

2.5 Branding and marketing23

2.6 Special events24

2.7 Service and vehicle standards.....26

2.8 Improving accessibility for transport disadvantaged people29

3 Focus area 2: Build trust.....36

3.1 Our equity-focused approach36

3.2 Our engagement process38

3.3 Collaborative working relationships39

4 Focus area 3: Environmental sustainability41

4.1 Integrating land use planning with public transport41

4.2 Decarbonising our bus fleet and related infrastructure.....44

5 Focus area 4: A connected and integrated network45

5.1 How we design our network and services45

5.2 Our public transport routes and service levels49

5.3 Multi-modal access63

5.4 Infrastructure64

5.5 Parking management71

6 Focus area 5: Value for money.....72

6.1 Funding.....72

6.2 Fares75

6.3 Procurement approach78

6.4 Workforce sustainability.....79

Part 380

7 Implementation and monitoring80

7.1 Performance monitoring and evaluation.....80

7.2 Making changes to this RTP: Our significance policy83

8 Attachments.....85

8.1 Attachment 1: Proposed Fare Zones for revised fare structure.....86

9 Appendices88

9.1 Appendix A: Strategic Directions (2024-2034) and goals.....88

9.1 Appendix B: LMTA principles in this RTP91

9.2 Appendix C: Strategic context93

9.3 Appendix D: Our engagement process for this RTP95

9.4 Appendix E: Urban form factors98

9.5 Appendix F: Transit-oriented development principles100

9.6 Appendix G: Table of Integral Services including routes, frequency and hours of operation102

9.7 Appendix H: Tables of units.....110

9.8 Appendix I: Cost recovery and measuring private share of operating cost117

10 Glossary122

11 List of acronyms124

Chairperson’s foreword

I am pleased to present the ~~draft~~ Otago Regional Public Transport Plan 2025-2035 – our blueprint for an integrated transport system that enhances community accessibility and connectivity, reduces congestion, and supports community wellbeing.

~~I invite you to read this draft plan and provide your feedback.~~

The ~~draft~~ plan has been developed with the community at its core. ORC staff have worked with local groups to understand their perspectives and we’ve collaborated with city and district councils and New Zealand Transport Agency Waka Kotahi to ensure it reflects Otago’s diverse transport needs.

ORC has made significant improvements in public transport over the past decade, such as raising bus driver wages above the living wage, increasing the number and frequency of bus services and introducing the Transit app to provide passengers with real-time bus tracking and trip planning.

These investments have paid off, as we have seen record-breaking use of our Dunedin and Queenstown bus services.

Our Total Mobility services have also grown significantly, helping more disabled people and those with long-term impairments travel independently and stay connected

This ~~draft~~ plan outlines our intentions to build on these successes by:

- introducing *Motu Move* in 2026, which provides passengers with an easy and consistent way to pay for public transport across Aotearoa
- transitioning to a fully electric bus fleet in Dunedin and Queenstown
- increasing bus frequencies in Queenstown
- supporting non-profit ‘community transport’ services to increase access to essential services in our rural communities.

While we have ambitious goals for the future, we must also adapt to changes in our operating environment. The Government Policy Statement on land transport (2024–2034) requires us to recover more costs through private revenue, such as bus fares, and shifts in government funding priorities also impact public transport co-investment.

Despite these challenges, we have an opportunity to look ahead with optimism and build on Otago’s positive public transport trends. We remain committed to keeping services accessible and affordable and

delivering public transport that supports a well-connected, vibrant, and resilient region.
~~keeping services accessible and affordable.~~

~~Now is your chance to have a say on the future of public transport in Otago. Your feedback on the draft plan will help ensure it reflects community needs and supports a well-connected, vibrant, and resilient region.~~

Part 1

1 Overview

The Otago Regional Public Transport Plan (RPTP) 2025-2035 is a statutory document that guides Otago Regional Council's (ORC) design and delivery of public transport services, information, and infrastructure. It is a 10-year strategic document with an emphasis on how ORC's funding and efforts are spent following the first three years of its adoption (2025-2027).

Public transport operates as a system. In order for all the system's elements to integrate and consistently deliver high-quality journey experiences, a high degree of collaboration and commitment across agencies and operators is required.

This RPTP has been prepared in collaboration with Otago's territorial authorities (Dunedin City Council (DCC), Queenstown-Lakes District Council (QLDC), Central Otago District Council (CODC), Clutha District Council (CDC) and Waitaki District Council (WDC)) and New Zealand Transport Agency Waka Kotahi.

We have also carried out extensive engagement with mana whenua, operators and community groups to understand their public transport needs, aspirations and priorities. Conversations with many of these stakeholders has directly informed this document along with feedback received from customers, and 2024 Long-Term Plan (LTP) and Annual Plan public submissions.

This RPTP meets the statutory requirements outlined in the Land Transport Management Act (LTMA) 2003 and follows NZTA's 'Development guidelines for regional public transport plans.

1.1 Why is public transport important?

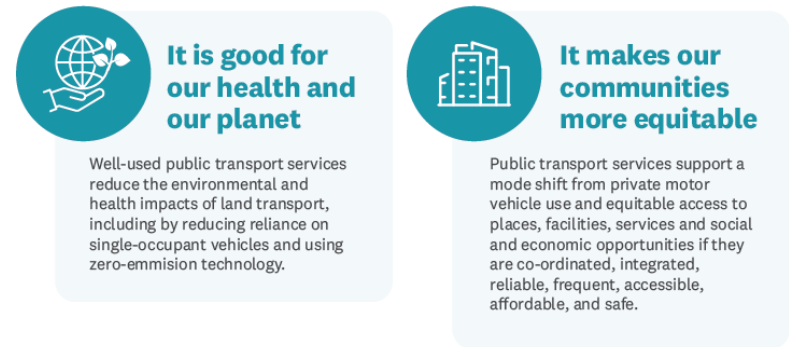


Figure 1a: The importance of public transport, derived from LTMA 2003 Section 115(1).

This RTP is guided by the LTMA public transport principles presented in **Error! Reference source not found.a** and Figure 1b.

Figure 1a outlines the importance of public transport for our health, our planet and the equity of our communities. These principles illustrate that good public transport benefits everyone, even people who do not use it.

Figure 1b highlights the components of a well delivered public transport system. We reflect these principles in all our work, including collaborating with our partner agencies and determining where we invest our money.

Together, these five principles make up the LTMA principles for good public transport. See **Appendix A** for more details on how this RTP gives effect to each LTMA principle.

How we deliver good public transport



Figure 1b: Principles delivering of good public transport, derived from LTMA 2003 Section 115(1).

While the LTMA principles represent standards of good public transport throughout New Zealand, the ORC transport aspiration captures the Otago-specific public transport vision. In this way, the ORC transport aspiration also guides this plan.

Read more about our transport aspiration within ORC's Strategic Directions 2023-2024 ([Appendix B](#)).


ORC transport aspiration

We aspire to provide an integrated transport system that contributes to the accessibility and connectivity of our community, reduces congestion and supports community wellbeing aspirations.

Goal 1: Congestion is reduced, and connection is increased throughout the region.

Goal 2: Carbon emissions are reduced, and air quality is improved across the region, supported by our efficient and affordable public transport services.

Goal 3: Active transport is the preferred mode for short journeys in urban areas.



1.2 Why do we need a Regional Public Transport Plan?

Public Transport Authorities (PTAs) are required to have an RPTP per the LTMA. Section 117 of the LTMA states that the statutory purpose of an RPTP is to provide:

- a means for encouraging regional councils, territorial authorities and public transport operators to work together in developing public transport services and infrastructure
- an instrument for engaging with the public in the region on the design and operation of the public transport network
- a statement of:
 - the public transport services that are integral to the public transport network
 - the policies, procedures and actions that apply to those public transport services
 - the information and infrastructure that support public transport services

The LTMA requires regional councils to review their RPTP as soon as practicable after the finalisation of the Regional Land Transport Plan (RLTP). ORC completed a mid-term review of the RLTP in 2024, triggering the renewal of the RPTP.

This renewal was timely, as ORC's previous RPTP (2021-2031) was completed during the COVID-19 pandemic and much of its content focussed on the travel patterns during that period. A lot has changed since then. Many people now work for home and public transport patronage has rebounded with more people taking different types of trips. Additionally, Otago

has undergone significant growth in the last few years, particularly in the Queenstown-Lakes district. As our region grows and evolves, it is essential that we plan our public transport to meet changing transport needs.

1.3 How does this RPTP fit within the wider strategic context?

The RPTP sits within a broader strategic planning and investment framework. This RPTP has been developed to consider, align, and give effect to a wide range of local, regional and national strategies, plans and policies, as outlined in **Error! Reference source not found..**

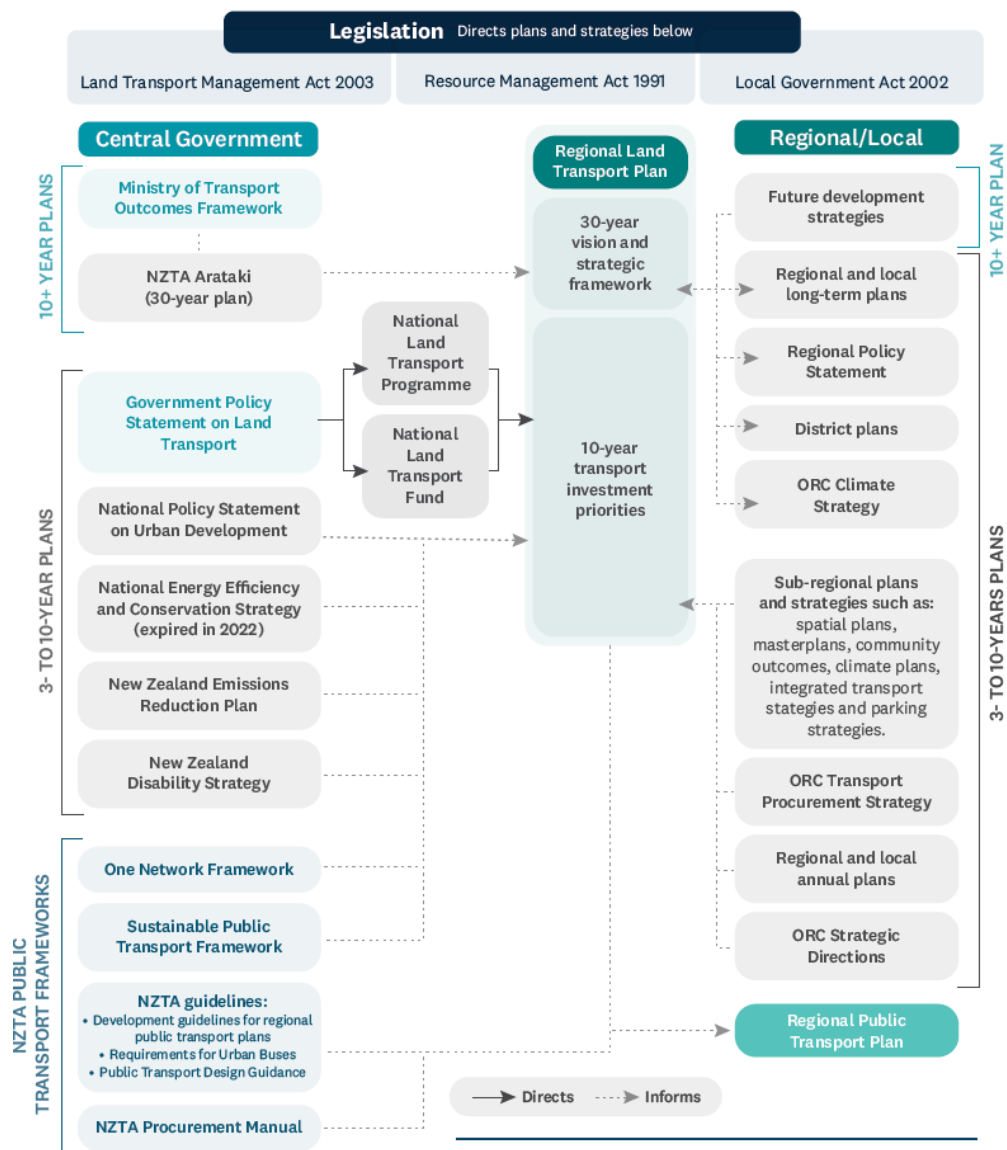


Figure 2 The strategic planning framework of the RPTP. The key policy drivers for this RPTP are the Government Policy Statement on land transport (GPS), the Ministry of Transport's Transport Outcomes Framework, and Otago's Regional Land Transport Plan (RLTP).

A full list of the plans and strategies informing this RPTP are provided in **Error! Reference source not found.**

1.3.1 Government Policy Statement on land transport (2024-2034)

The GPS sets out central government's strategic priorities for transport planning and investment and is guided by the Ministry of Transport's Transport Outcomes Framework. The GPS 2024 focuses on achieving four strategic priorities:

- **Economic growth and productivity:** efficient investment in our land transport system connects people and freight quickly and safely, supporting economic growth and creating social and economic opportunities including access to land for housing growth.
- **Increased maintenance and resilience:** New Zealand needs a transport system that is resilient to the impacts of weather events and other natural disasters. Increasing maintenance and resilience enables us to effectively manage and reduce current and future risk and adapt to these challenges.
- **Safety:** a safe transport system is critically important. The steady decline in deaths and serious injuries we observed between the 1980s and early 2010s has slowed over the past decade.
- **Value for money:** the government wants to realise greater value from the financial investment made into our land transport system.

Directed by the GPS, the National Land Transport Programme (NLTP) determines the activities which will receive investment from the National Land Transport Fund (NLTF). As a public transport authority, ORC must propose activities to be incorporated into the NLTP to achieve our regional transport vision. We propose these activities through an RLTP.

1.3.2 The Otago Southland Regional Land Transport Plan (2021-2031)

The Otago Southland RLTP (2021-2031) outlines the 30-year strategic objectives and 10-year network improvement plans for the region's transport network. The network improvement plans form our application for funding from the National Land Transport Fund for the next three years. A 2024 midterm review has been completed to reflect the priorities of the most recent GPS and all transport plans and strategies from Otago and Southland councils.

The current RLTP's 10-year transport investment priorities are:

1. Optimise an **efficient and accessible** transport network through enhanced mode choice provision across the regions.
2. Promote **safety and wellbeing** outcomes across the regional transport network.
3. Enhance network **maintenance and resilience** to ensure community access and connectivity.

The RPTP details how investment allocated in the RLTP will deliver and improve public transport services, infrastructure, and supporting elements in Otago.

1.4 An overview of Otago's public transport system

1.4.1 Roles and responsibilities

ORC is responsible for the delivery of public transport services in Otago. We set the bus routes, schedules, provide public transport information and contract the service delivery to specialist public transport operators (PTOs). The current PTOs in our region are Go Bus Transport (Dunedin), Ritchies Transport (Dunedin and Queenstown), Real NZ (Queenstown)

ferry). They provide the buses, ferries, drivers and depots and are responsible for ensuring services are delivered to the timetables.

We also manage the Total Mobility Scheme in Otago. These services provide **door-to-door** public transport for disabled people who cannot easily use our buses or ferry. Total Mobility **is a nationwide scheme** whose services are delivered by contracted taxi and mobility vehicle operators.

People can also travel around Otago using transport options not currently subsidised by ORC, including exempt inter-regional services and Ministry of Education school services that connect rural areas to schools (**Error! Reference source not found.**).

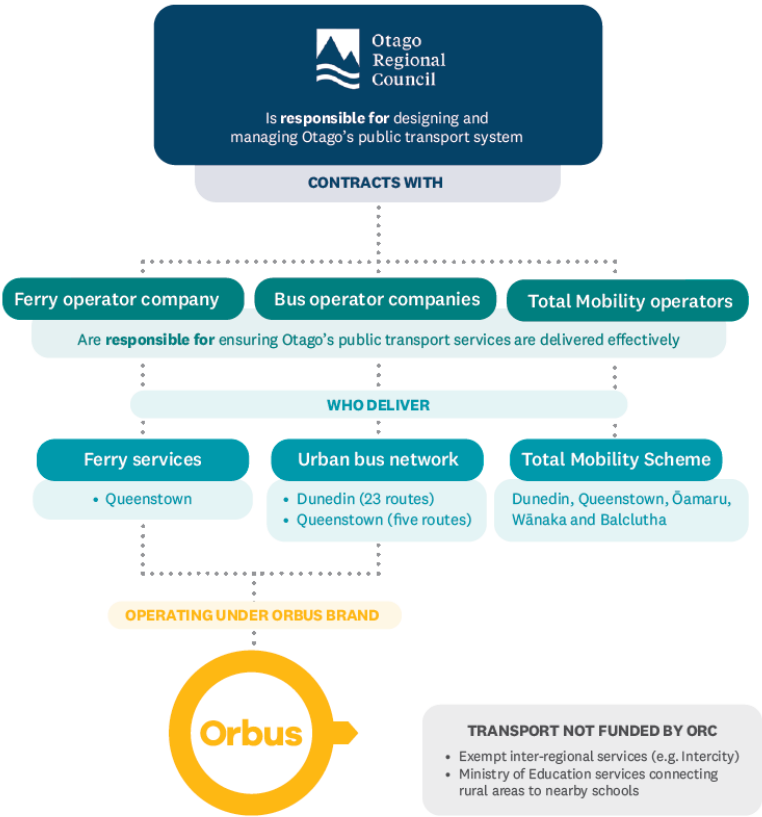


Figure 3 The roles and responsibilities in Otago's public transport system.

As of 2025, Otago's public transport system consists of the following services:

- The Orbus urban bus network comprising 23 bus routes in **Dunedin** and five bus routes in **Queenstown**
- One ferry service in **Queenstown**
- Total Mobility services in **Dunedin, Ōamaru, Queenstown, Wānaka** and **Balclutha**
- “Exempt” services which are not currently funded by ORC
- Ministry of Education school services which primarily connect rural areas to their closest available schools

Public transport infrastructure such as bus stops, shelters and interchanges are provided in collaboration with our territorial authorities and NZTA. Territorial authorities and NZTA are also responsible for designing and regulating roads, though ORC collaborates with them in wider transport and spatial planning.

~~At a national level, NZTA~~ At a national level, NZTA shapes the transport system through strategic frameworks and the GPS. They also oversee the planning, operation, implementation, and delivery of public transport (including issuing guidelines for regional public transport plans) and managing funding of the land transport system. ~~invests in public transport services and infrastructure through the NLTP and shapes the transport system through strategic frameworks and the GPS on land transport.~~

1.4.2 Our achievements over the past 10 years

ORC works closely with our partner agencies (NZTA and territorial authorities) and PTOs to plan, fund and deliver public transport services and infrastructure.

Collectively we have invested and made significant improvements to public transport in Otago over the last ten years (**Error! Reference source not found.**).

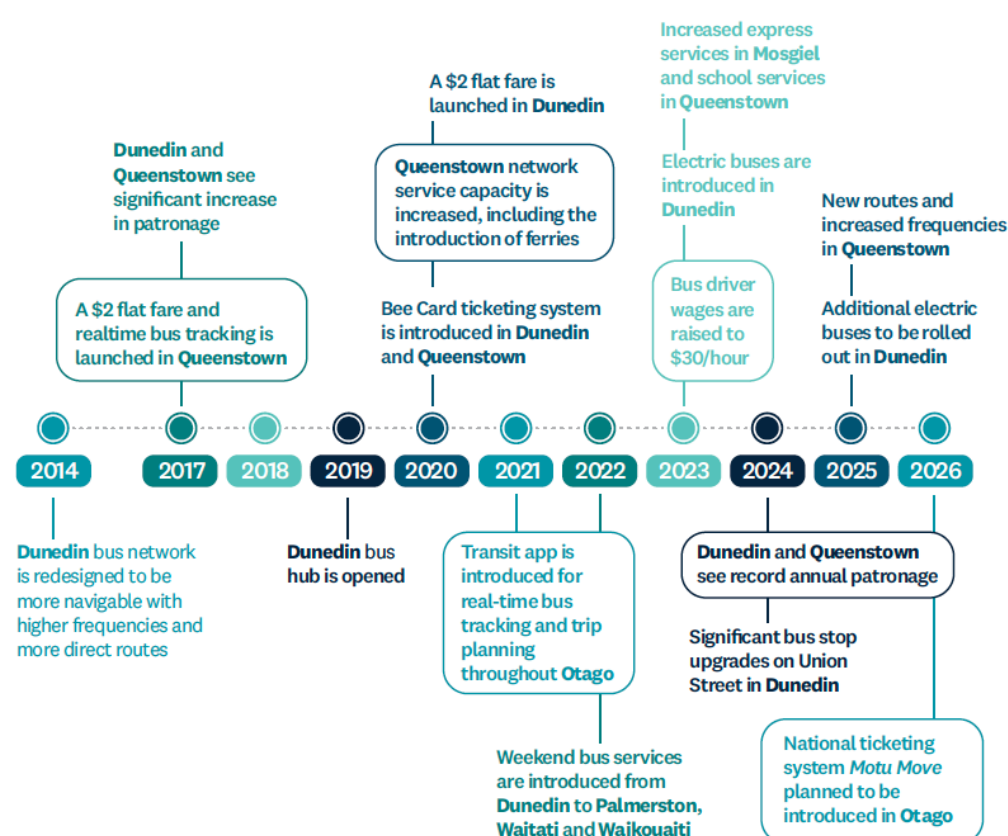


Figure 4 A timeline of key improvements to Otago's public transport since 2015.

Passengers have responded positively to these investments. From 2018 to 2023, the proportion of people using public transport to travel to work increased by 33% in Dunedin (from

4% to 5.3% of mode share) and 24% throughout Otago (from 2.5% to 3.1% mode share). Similarly, the total number of trips taken using public transport rose from 3.4 million in 2019/2020 to 5.3 million in 2023/2024—a 54% increase (**Error! Reference source not found.**). These statistics not only outperform similar-sized urban areas elsewhere in New Zealand, but also defy the national downward trend of public transport use for travel to work.

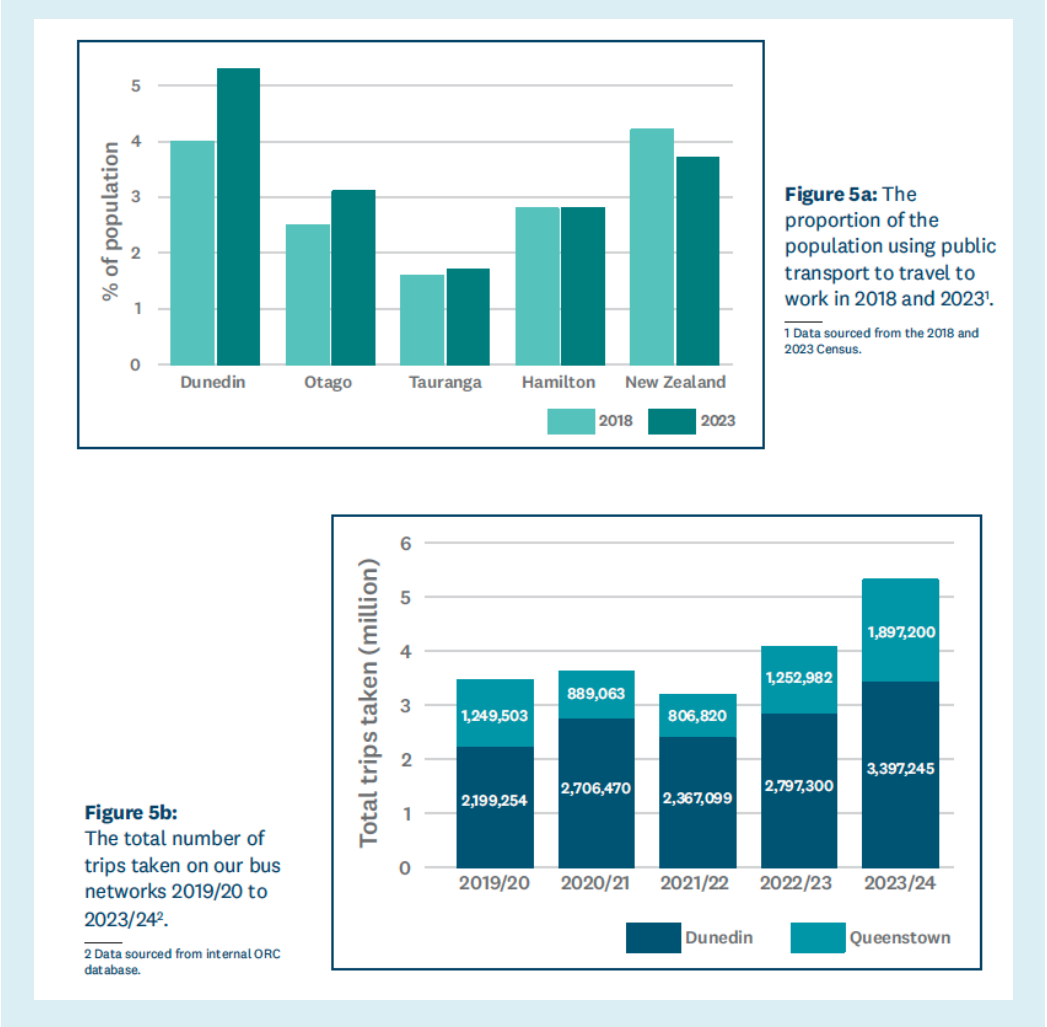


Figure 5 Top) The proportion of the population using public transport to travel to work in 2018 and 2023¹. Bottom) The total number of trips taken using Otago's public transport from 2019 to 2024².

These statistics tell a clear story: our investments are working, and more people are using public transport as their preferred mode of travel. We aim to build upon these successes to get more people using and benefiting from public transport.

Strengthening these partnerships is one of our key priorities, as doing so will improve how we can serve our communities.

¹ Data sourced from the 2018 and 2023 Census.

² Data sourced from internal ORC database.

1.5 Challenges and opportunities

Some of the key challenges and opportunities this RPTP seeks to address are:

Confronting the climate emergency	Climate change is one of the greatest challenges facing humanity. Public transport plays a key role in reducing private car dependence and usage and lowering transport-related emissions. We have an obligation to future generations to act now.
Public safety	Anti-social behaviour at stops, interchanges, and on services undermines the appeal of public transport.
Sustainable work force	Bus drivers are the backbone of public transport. We must ensure they are fairly compensated, provided adequate facilities, and feel valued in their profession.
Increasing transport choice	Otago’s high private car dependence is suppressing public transport use, contributing to congestion and poor livability outcomes. Investing in public transport provides people with more transport choices, enhances access to opportunities and improves community health, connectivity, and equity.
Regional connectivity	People living in Otago’s small urban centres and rural communities have limited public transport options. This poses significant inequities to access essential services for those who are unable to drive.
Planning and meeting needs as our region grows	As our region grows, we must be able to respond to changing travel demand. This includes aligning policies and long term planning with territorial authorities and considering alternative cost-effective public transport solutions that maintain well-functioning urban environments. This is particularly relevant for Queenstown and surrounding areas.
Affordability and funding	Balancing investment in high-quality public transport while keeping our services affordable and attractive to passengers is challenging in a constrained financial environment.

1.6 Our key priorities in this RPTP

Based on ORC’s Strategic Directions, our external strategic environment, challenges and opportunities, and statutory requirements, we have developed five focus areas which form the basis of this plan. Each focus area has an associated objective. **Error! Reference source not found.** below summarises our key priorities to achieve each objective.

Table 1 The five focus areas guiding this RPTP.

Focus area	Objective	Key priorities
1)Passenger experience	Provide useful public transport services that <u>promote social inclusion and</u> respect the safety and wellbeing of <u>all</u> passengers., particularly for transport-disadvantaged people.	<ul style="list-style-type: none">• Deliver a high-quality customer experience by prioritising users' accessibility, safety, and comfort• Easy access to timetable, ticketing, and real-time information• Promotion and education on how to use our services to reduce barriers to access
2)Build trust	Proactively engage with communities and organisations, including iwi, to foster trust and ensure public transport projects align with community priorities.	<ul style="list-style-type: none">• Strong collaborative relationships with key partners in the planning and delivery of public transport• Utilise an equity-focused approach to supporting the needs of transport-disadvantaged people
3)Environmental sustainability	Invest in a public transport system that <u>reduces dependence on private vehicles,</u> promotes positive <u>environmental outcomes and supports regarding greenhouse gas emissions, pollutants and land usesustainable urban planning and development.</u>	<ul style="list-style-type: none">• Proactively support good land use policy through integration with public transport design• Support electrification of the public transport fleet

Focus area	Objective	Key priorities
4)A connected and integrated network	Deliver a reliable and convenient public transport system that improves personal freedom and access to opportunities.	<ul style="list-style-type: none">• Design services according to best-practice design principles• Enhance urban networks through new services, and improvements to frequency and service hours• Enhance regional connectivity through trial services and community transport
5)Value for Money	Provide public transport services in a manner that represents good value for money.	<ul style="list-style-type: none">• Set fares so they are simple, fair and affordable to users, but generate sufficient revenue to maintain financial sustainability of our services• Improve financial performance by enhancing third-party revenue sources and implementing efficiencies in service delivery• Procure service contracts in a way that supports fair pricing, a competitive market, and sustainable delivery of services

Part 2

2 Focus area 1: Passenger experience

Objective: Provide useful public transport services that promote social inclusion and respect the safety and wellbeing of all passengers, ~~particularly for transport-disadvantaged people.~~

For public transport to make our region more equitable and less reliant on private vehicles, we must provide a consistently good experience to our passengers. Delivering a convenient, reliable, safe and accessible experience will make passengers who need our services happier to use them, and those who have other transport options more likely to return to them.

A positive passenger experience requires all the steps of a public transport journey to go well. These steps include:

- Planning your journey
- Paying for your journey
- Travelling from your origin to the bus stop or waiting area
- Waiting
- Boarding
- Travelling on the service
- Alighting, or getting off
- Transferring services
- Travelling from the service to your destination
- Returning to your origin
- Providing feedback

In our passenger experience objective, we use the following terms:

Useful: the service takes passengers where they want to go in a reliable and punctual way

Safety: the service induces passengers to feel both real and perceived safety

Wellbeing: the service enables passengers to travel with comfort and dignity

~~**Transport-disadvantaged:** The service provides a suitable way to travel for people who cannot get around easily.~~

Our goal is to drive positive passenger experience to attract more users to use public transport and serve Otago's public transport needs.



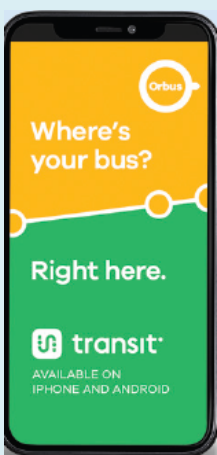
2.1 Public information

Our services are only as good as the public information we provide for them. We are committed to providing public information on fares, ticketing, code of conduct, timetables, wayfinding, and accessibility that:

- is easy for users and the wider community to understand
- is accurate and up to date, so users can make transport choices with confidence
- is accessible for people of all abilities.

We use a range of methods to communicate with users and the wider community including social media, the Transit wayfinding app, on-bus posters, electronic real-time signs, 24-hour customer experience phone access and the Orbus website. Some areas where we intend to further improve our public information include:

- **Wayfinding:** To support our passengers in navigating the network with confidence and ease, we seek to build on existing wayfinding, both physical and digital, and identify new opportunities to improve navigation.
- **Exempt service info:** Much of the regional public transport network is delivered by exempt services. These are commercial scheduled services run without public subsidy, such as InterCity. Although we do not manage these services, we will seek to provide information about them so that passengers have a full picture of the transport options available to them.
- **New technology:** Innovative products for communicating public transport information pose exciting opportunities for improving our passenger experience. We will continue to explore investing in new technology where it adds meaningful value to our services, including on-bus audio announcements and alert screens at key interchanges.



Case study: Transit app

In 2021, ORC integrated our bus services with the Transit wayfinding app, making it easier for passengers to plan journeys, track buses' real time location, send us instant feedback and receive alerts about detours and delays. The Transit app has consistently gained popularity among passengers in Dunedin and Queenstown. From January 2023 to December 2024, the number of users increased by 40%, to 14,998 users. Our passengers have also regularly provided feedback that the app makes using our services more predictable and pleasant. We are committed to continually improving the Transit app's ease of use and accuracy to ensure the best possible journey experience.

Public information policies	
PI P1	<p>Information: Provide information to passengers and the public that supports access to public transport services in a way that is:</p> <ul style="list-style-type: none">• easy to understand• accessible and widely available• accurate and up to date.
Public information actions	
The Council will:	
PI A1	Monitor and evaluate the Orbus webpage, Transit app and customer feedback data to ensure our public information content and tools are effective.
PI A2	Continuously enhance our real-time passenger information system to improve wayfinding and build trust with passengers.
PI A3	Explore technologies that meaningfully improve the accuracy, clarity and accessibility of public information.
PIA4	Encourage passengers to access public transport information via digital channels while maintaining existing physical signage.
PI A5	Work with exempt service operators to provide relevant public information about exempt services that form part of Otago's regional network.

PI A6	Provide open access public transport data in a way that is up to date, reasonably priced and useful to groups including researchers and third-party platforms.
PI A7	Work with disability advocacy groups to extend public transport information channels to include accessible formats such as NZ Sign Language, Easy Read, Braille, large print and audio.

2.2 Safety

We strive for our passengers to feel safe and secure throughout their entire transport journey. It is a passenger's right to use public transport with the confidence that they will be safe on every trip, regardless of its place or time. A consistently safe experience will also attract new passengers.

While public transport is proven to be one of the safest forms of transport, we recognise risks to passengers' safety may arise from factors including unsafe road conditions and anti-social behaviour. We also recognise that passengers experience safety and comfort differently depending on their gender identity, sexual orientation, ethnicity, age, and physical and cognitive disabilities.

To minimise these risks and deliver a consistently safe experience for all passengers, we are committed to using both infrastructure and behaviour change-related interventions.

Infrastructure-related interventions involve ORC coordinating investment in physical infrastructure and vehicles to enhance our passengers' safety. They include:

- collaboration with our partner agencies to improve road, public transport, and pedestrian infrastructure informed by [New Zealand Crime Prevention Through Environmental Design](#) guidelines (see Section **Error! Reference source not found.**).
- collaboration with service operators to ensure the highest standard of passenger and driver safety, ~~and driver working conditions onboard vehicles~~ (see Section **Error! Reference source not found.**).

Behaviour change-related interventions involve working with our partner agencies and key stakeholders to make our services more secure and comfortable for passengers and staff. They include:

- collaboration with service operators to deliver rigorous driver training (see Sections **Error! Reference source not found.** and **Error! Reference source not found.**).
- collaboration with schools to address anti-social behaviour (see Section **Error! Reference source not found.**).
- marketing campaigns to improve awareness of best safety practices for passengers (see Section **Error! Reference source not found.**).
- use of security services at our interchange facilities to safely identify and manage anti-social behaviours that pose a risk to our drivers and passengers (see Section **Error! Reference source not found.**).

Safety policy	
S P1	Safety: deliver a consistently safe end-to-end journey public transport experience for all passengers and staff through proactive, targeted, and collaborative infrastructure and behaviour-change-related interventions.

2.3 Customer service

Customer service shapes public perception of public transport in ways that service performance and marketing cannot. When passengers feel respected and well-served, they are more likely to use public transport more often and recommend it to others. We strive for all drivers, ticketing retailers, and ORC staff to consistently deliver outstanding customer service to build trust with existing passengers and attract new ones.

We provide all public transport staff, either directly or through our service operators, with extensive training to ensure we meet the needs of all passengers including:

- transport-disadvantaged people (see Section **Error! Reference source not found.**), including people travelling with a wheelchair or service dog
- people travelling with domestic pets, pushchairs, strollers, suitcases, scooters, skates, skateboards, skis, snowboards, and bikes
- people who are new to our services, including visitors to Otago.

We take our responsibility to uphold our standards of customer service seriously, but we know mistakes happen. Any instances of poor customer service reported to us are recorded and addressed as soon as possible to prevent further issues and restore trust. Passengers and the public can provide feedback on our website, by phone, by email and in-person. We record all public transport-related complaints, requests, enquiries, and compliments received and continuously analyse them to inform improvements in our services.

ORC Strategy and Customer team is developing a framework to improve our customer services' quality and efficiency. This will be implemented over the course of this RPTP.

Customer service policies	
CS P1	Customer service standards: deliver efficient, respectful, and solution-oriented customer service to maximise customer satisfaction and trust in our services.
CS P2	Training: collaborate with service operators, ticket retailers, and customer experience staff in training of all staff involved in public transport delivery to provide outstanding customer service that builds trust with existing passengers and attracts new ones.
CS P3	Personal items on public transport: permit passengers to travel with the following items: <ul style="list-style-type: none">• Domestic pets: domestic pets can travel for free and only during off-peak times. Pets must be fully enclosed in a suitable pet carrier, not a bag or backpack. The carrier must be on the passenger's lap to avoid being a tripping hazard.• Pushchairs and strollers• Service dogs• Suitcases• Wheelchairs• Scooters, skates and skateboards• Skis or snowboards

	<ul style="list-style-type: none">• Foldable bikes Passengers are not permitted to bring the following items aboard: <ul style="list-style-type: none">• Non-foldable bikes³• Surfboards• Mobility/motorised scooters Passengers hold responsibility for the collection, storage and movement of their items on public transport. Items must not pose safety hazards or inconveniences to drivers or other passengers, for example, by blocking walkways or seating areas.
Customer service actions	
The Council will:	
CS A1	Require service operators to provide robust training programmes for drivers, including specialised training in: <ul style="list-style-type: none">• effectively assisting passengers of all access needs, including disabled people and those travelling with young children• de-escalating anti-social behaviour or customer dissatisfaction, where safe to do so.
CS A2	Provide staff involved with customer feedback comprehensive and ongoing training, including specialised training in: <ul style="list-style-type: none">• recording, addressing, analysing, and reporting customer feedback data• de-escalating customer dissatisfaction.
CF A3	Work with ticket retailers to provide ongoing customer service training, and up to date ticketing and fare information.
CF A4	Undertake a public transport customer satisfaction survey (of NZTA standard) on an annual basis.
CF A5	Consider continuous customer feedback and NZTA public transport satisfaction survey data when reviewing Orbus Code of Conduct and implementing network and service changes.

³ Non-foldable bikes can be attached to the bike racks fitted on the front of buses. ~~In 2024, NZTA implemented a temporary restriction on bike racks on buses. Visit <https://www.orc.govt.nz/orbus/> for the latest information about using bike racks on buses.~~

2.4 Ticketing system

An easy-to-use and integrated ticketing system is central to an accessible and easy-to-use public transport system. Since 2020, we have implemented and optimised our Bee Card ticketing system -a simple smartcard system shared among ten other public transport networks across the country. The Bee Card system has provided passengers with benefits like tagging on and off trips, online top ups, and managing multiple cards through one online account.

Motu Move, the National Ticketing Solution implemented by central government, will be rolled out in Otago in 2026. This new ticketing system will offer features including:

- contactless debit or credit card payments, including digital wallets such as Apple Pay and Google Pay
- a national Motu Move prepaid card
- concessions (discounts) can be linked to whichever type of card you choose
- no contactless or online transaction fees
- a mobile app for easy access
- faster top-up processing
- acceptance across all public transport buses, trains and ferries across Aotearoa New Zealand
- locally set fares.

As we transition from the Bee Card to Motu Move, we will provide a well-communicated and easy-to-understand transition procedure for passengers.

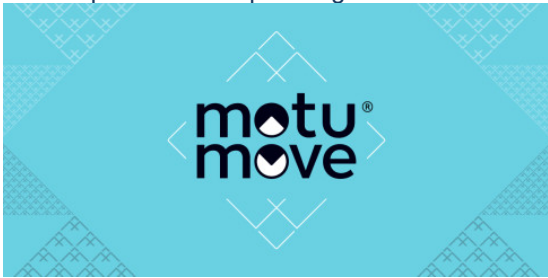


Figure 6 Motu Move is the future national public transport ticketing system and will be rolled out in Otago in 2026.

Ticketing system policies	
TS P1	Ticketing: implement and promote an easy-to-use, accessible, and integrated ticketing system to provide seamless payment for all passenger journeys.
Ticketing system actions	
The Council will:	
TS A1	Require operators of contracted services integral to the public transport networks to participate in any integrated ticketing system ORC owns or participates in.

TS A2	Collaborate with NZTA to effectively transition from the Bee Card to Motu Move ticketing system through activities including public education campaigns and Bee Card replacement schemes.
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2.5 Branding and marketing



Branding, marketing, and outreach activities help shape the public perception of the Orbus network and public transport more generally. When people perceive public transport as convenient and accessible, they are more likely to choose it over other modes of transport.

Maintaining a well-liked and easily identifiable brand is essential for retaining existing passengers and attracting new ones. The Orbus brand, introduced in 2017, has enabled our services to be consistent and marketable, creating a sense of place and identity in Otago.

Marketing our services effectively makes it easier for people to choose public transport and navigate the network. To achieve this, we will continue to develop our advertising and community outreach activities. This includes helping our communities understand how to use and benefit from our services. We will prioritise promoting our services with transport-disadvantaged groups to help overcome any barriers and allow them to use our services with confidence.

Branding and marketing policies	
BM P1	Branding: Operate Orbus services to develop and maintain a brand which: <ul style="list-style-type: none">• is strong, consistent and regionally integrated• aligns with ORC values, such as community wellbeing and environmental sustainability.
BM P2	Marketing and promotion: actively promote Otago's public transport services to positively reinforce their affordability, accessibility, sustainability, and convenience.
Branding and marketing actions	
The Council will:	
BM A1	Implement and maintain a strong and regionally aligned Orbus brand so that it is consistently applied across public transport services, and supporting infrastructure.

BM A2	Continuously develop and promote strategic marketing campaigns to raise awareness, reduce barriers to access, improve safety and increase patronage of Orbus services.
BM A3	Collaborate with partner agencies, communities, and relevant stakeholders to: <ul style="list-style-type: none">• implement targeted promotion and outreach programmes designed to educate the public and build confidence using public transport.• identify and understand the barriers that prevent communities from using public transport, with a particular emphasis on perceptions of inaccessibility.
BM A4	Collaborate with partner agencies to coordinate the promotion of wider regional transport projects that include public transport.

2.6 Special events

Special events provide an opportunity to attract people and revenue to our region. We are committed to working with event organisers and venues to provide detours, additional services, and ticketing agreements where it is logistically and financially feasible to do so.

By providing targeted event travel, we make events more accessible, safe, and sustainable, while reducing disruption to other road users. It also encourages new users to use our services.

Case study: Serving cruise ship passengers in Dunedin

From October to April cruise ships regularly visit Dunedin, generating significant tourism activity. On the busiest days, more than 5,000 cruise ship passengers disembark at Port Chalmers and have the option to travel to Dunedin’s city centre on public transport or commercial shuttles. To maintain a reliable service for locals using the Port Chalmers bus and attract cruise ship passengers, ORC has collaborated with Port Otago and Dunedin City Council to develop and implement a Cruise Ship Action Plan. By proactively scheduling additional services and streamlining ticket sales, cruise ship passengers generated over 15,000 additional bus trips and over \$45,000 in fare revenue in the 2023/2024 season alone. The success of our cruise ship-targeted services highlights the potential for special event travel to bring positive social outcomes to the community ~~while being financially viable for ORC.~~



Special events policies	
SE P1	Events: support access to events to reduce congestion, improve safety, and maintain the operational performance of the transport network, where logistically and financially viable.
Special events actions	
The Council will:	
SE A1	<p>Where funding for targeted public transport services is secured by event organisers, support special events by:</p> <ul style="list-style-type: none">• contracting and managing service provision on behalf of event organisers• providing discounted fares to use on the existing public transport network• undertaking promotional/marketing activities. <p><u>Where possible, event services should be branded and run as extra trips on the existing network; in some cases, services may run on bespoke alignments</u></p>
SE A2	<p>Financially contribute to the provision of public transport services for major events. Special events are considered to be major where each condition below is met:</p> <ul style="list-style-type: none">• Sufficient public funding is available• The event is generally expected to have more than 10,000⁴ attendees on any one day• The event takes place within ORC boundaries• The wider community would benefit from event-related public transport services
SE A3	Work with partner agencies, event organisers and other relevant groups to plan and implement public transport services for special events in a way that reduces congestion, improves safety, and maintains the operational performance of the transport network.
SE A4	Maintain an annual calendar of planned events to assist with the planning and provision of public transport.

2.7 Service and vehicle quality standards

2.7.1 Service quality standards

Our passengers’ perception and experience of our services is largely determined by how well our services operate. A high-quality service is a result of the following operational practices:

⁴This threshold is informed by Otago territorial authorities’ definition of a major event.

- Adherence to the published timetable, and availability of real-time information to give passengers confidence even when a vehicle is running late.
- Realistic trip times so that trips are not consistently early or late.
- Coordination between drivers to support any timed transfers that are necessary for efficient network operations.
- Minimisation of cancelled services, and notification when a trip is cancelled.

Real-world conditions can be unpredictable. It is therefore not possible or realistic to completely avoid deviations from scheduled services, particularly when there are roadworks or at certain times of the year (such as the beginning of school terms). We closely monitor our services for deviations, including cancelled trips, late departure from the first stop, missed stops, and failure to connect the service to the correct trip for real-time information. Where these deviations are due to factors within the control of operators, we apply financial penalties.

However, not all elements of service performance are within our or operators' direct control. In these instances, we work with road controlling authorities to enable road and stop configurations that allow for fast and reliable public transport.

Our targets for punctuality and reliability are outlined Section **Error! Reference source not found.**

Service quality standards policies	
SQ P1	Quality: deliver a service that meets the highest standards of safety, reliability, and punctuality.
Service quality standards actions	
The Council will:	
SQ A1	Set public transport timetables that: <ul style="list-style-type: none">• adhere to a repeating “clockface” schedule as much as practical• are based on realistic and achievable running times, varying between peak, interpeak, and early morning and late night times• use intermediate timing points that allow late-running trips to catch up and early trips to be held, without significantly slowing down running times.
SQ A2	Will <u>work</u> with service operators, <u>to</u> implement the following practices to minimise deviations from specified service: <ul style="list-style-type: none">• Include measurable and enforceable provisions in contracts, including provisions relating to the Key Performance Indicators of the RTPP and Annual Plan, to enforce adherence to specified service• Collaborate with operators to ensure that adherence to specified service is embedded in driver training and culture• Financially penalise contractors, within contractual terms in a proportionate and fair way, for deviations from service specifications, where the deviation is within the reasonable control of operators.

SQ A3	Maintain, optimise and promote real-time information so passengers can accurately track and predict vehicle arrivals.
SQ A4	Work with contracted operators to maintain a consistently safe passenger and driver experience through safety measures including: <ul style="list-style-type: none">• Full closed-caption television (CCTV) coverage on all buses, both inside and outside• Rigorous driver training, including safe driving and de-escalation components• Enforcement of vehicle safety standards• Security <u>and customer service</u> staff at additional interchanges and on services where suitable.
SQ A5	Collaborate with territorial and road-controlling authorities to implement public transport priority or other efficiency measures that will improve reliability and punctuality.

2.7.2 Vehicle quality standards

Delivering our public transport service with high-quality vehicles directly improves our passengers’ access to safe, sustainable, and comfortable transport. We work closely with our service operators to meet the NZTA Requirements for Urban Buses (RUB). The requirements are designed to continuously improve public transport bus quality. They focus on ensuring public transport vehicles are:

- **Safe and appealing:** the RUB prioritises making public transport bus travel safer and more appealing to all passengers, with a focus on the elderly, disabled people, and commuters. Standards like high visibility handrails, minimum aisle widths, noise level requirements, and real-time driving evaluation technology ensure our vehicles meet all passengers’ needs.
- **Environmentally sustainable:** The RUB mandates public transport vehicles achieve high environmental standards. Read more on how we will meet these environmental standards in Section **Error! Reference source not found.**

While the RUB only applies to buses, we use the general principles of quality and accessibility set out in the RUB as guidance for non-bus public transport vehicles. This includes our ferry service, which meets the required Maritime NZ standards, and any future non-bus public transport vehicles in our fleet.

Future updates to the RUB

NZTA intends to incorporate the following future technologies in the RUB:

- Driver Fatigue Management systems
- Cyclist detection system
- Acoustic vehicle alerting systems on electric buses to alert blind and low-vision people
- Autonomous braking
- Lane-keep assist

Vehicle quality standards policies	
VQ P1	<p>Vehicle standards (RUB): all vehicles and vessels used to operate Otago Regional Council public transport services, at a minimum, comply with the RUB. At the time of this RPTP the requirements state:</p> <ul style="list-style-type: none">• Vehicles new to urban bus service entering our fleet adhere to the latest version of RUB• Vehicles previously used for urban bus service entering our fleet adhere to the RUB section corresponding to the contract's age• Vehicles in the existing fleet undergoing midlife refurbishment adhere to the RUB 2024 version.
VQ P2	<p>Vehicle standards (ORC requirements): through procurement of vehicles, assignment of vehicles to trips, and ongoing collaboration with operators, the fleet should support safety and good passenger experience in the following areas:</p> <ul style="list-style-type: none">• Sufficient capacity to meet peak demand on particular routes• Enhanced seating capacity (as opposed to standing capacity) on routes with significant running at 80kph or above, or long passenger trip lengths• Sufficient onboard luggage capacity for the needs of particular routes (particularly with regards to airports and ski / sports equipment)• Universal availability and safety of external bike racks• Additional safety, accessibility, environmental and comfort features• Driver protection structures (e.g. screens)
Vehicle quality standards actions	
The Council will:	
VQ A1	Procure new fleet through service contracts that meets RUB standards in VQ P1 above, and additional requirements as outlined in VQ P2 above.
VQ A2	Require ferries on contracted services to comply with Maritime NZ standards and encourage use of established best practices.
VQ A3	Collaborate with key stakeholders, including disability advocacy groups and service operators, to monitor vehicle safety and accessibility and advocate for vehicle quality standards that meet the needs of all passengers, particularly transport disadvantaged people.

2.8 Improving accessibility for transport-disadvantaged people

When transport systems fail to meet the needs of everyone in the community, the people whose needs go unmet experience **transport disadvantage**. Without adequate transport options, transport-disadvantaged people are excluded from life-enhancing opportunities. As a result, the community becomes less equitable. A core purpose of public transport is to uplift people out of transport disadvantage by providing accessible, affordable, and available transport options.

A range of personal, demographic, social, and geographical attributes impede peoples' access to opportunities and the use of public transport services and facilities. Those who are most likely to experience transport disadvantage include:

- disabled people
- people without driver licenses, including children and the elderly
- people with low incomes
- people with physical and mental health conditions
- people in isolated rural locations
- people in households with no access to private vehicles.

ORC is committed to delivering an equitable public transport network that provides opportunities for everyone. By providing transport options for transport-disadvantaged people, there are significant social and economic benefits for our whole community.

Other sections of this RPTP also cover how we address the needs of transport-disadvantaged people, such as our equity-focused approach to decision-making (Section **Error! Reference source not found.**) increasing modal choices by integrating land use planning with public transport (Section **Error! Reference source not found.**), expanding services into more communities in Otago (Section **Error! Reference source not found.**), and improving affordability through fair fares (Section **Error! Reference source not found.**).

Accessibility policies	
A P1	Accessibility: deliver an equitable and accessible public transport network for transport-disadvantaged people across all our services. This includes our urban bus networks, ferry services, Total Mobility, and any new services.

2.8.1 Total Mobility

Some disabled people have transport needs that cannot be fully met by a fixed-route public transport service. To support these people in meeting their daily needs and enhancing their community participation, local and central government jointly fund Total Mobility. Total Mobility is a nationwide scheme that provides subsidised door-to-door transport services for eligible people through approved commercial taxi and mobility operators.

Total Mobility is an exempt integral service in Otago's public transport network. It currently comprises 16 operators who serve some 8660 registered clients in Dunedin, Queenstown, Wānaka, Ōamaru and Balclutha. To make sure the service is available to all people who need it, ORC implements the eligibility principles outlined in **Error! Reference source not found.**.

Table 2 ORC Total Mobility user eligibility principles.

NZTA guideline	ORC interpretation
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General eligibility	
<p>An eligible person must have an impairment that prevents them from undertaking any one or more of the following five components of a journey unaccompanied, on a bus, train or ferry in a safe and dignified manner:</p> <ol style="list-style-type: none">1. Getting to the place from where the transport departs.2. Getting onto the transport.3. Riding securely.4. Getting off the transport.5. Getting to the destination.	<p>When applied to mobility impairments, steps 1 and 5 will be interpreted as a person's ability to walk 500 metres on paths that may have some minor slopes and irregularities.</p> <p>When applied to mobility impairments, steps 2 and 4 will be interpreted in light of a person's ability to board a kneeling bus from ground that is the same height as the ground under the bus.</p>
Eligibility of children	
<p>The scheme should be available to children to support their independent participation in the community, in ways that are similar to other children in their peer group who do not have impairments.</p>	<p>Children aged less than five are not eligible for Total Mobility in Otago.</p> <p>Children of age 5-12 may be considered eligible for Total Mobility, if the reason for application is to support their increasing ability to travel independently in their community, in line with their peer group.</p> <p>Independent travel does not preclude the support of caregivers.</p>

One challenge facing Total Mobility in Otago's small communities is the lack of suitable operators, leaving communities with limited access to opportunities. Compounding this is the disproportionately large share of ageing people in these small communities compared to our urban centres. ORC will continue to explore ways to bring accessible transport services to small communities, including through expanding Total Mobility services and community transport.

An additional challenge arises from social organisations struggling to remain involved in Total Mobility as assessment agencies due to their constrained resourcing. In 2024 we saw multiple agencies withdraw their services while other agencies have reported similar constraints. This under-resourcing persists as demand for eligibility assessments increase.

Since ORC's previous RPTP, we have made Total Mobility more affordable by raising the fare subsidy cap from \$25 to \$37.50. We will continue to prioritise affordable of Total Mobility as these customers are largely on fixed or low incomes. For more information about how Total Mobility trip costs are funded, see **Error! Reference source not found.****Error! Reference source not found.**



Commented [RH1]: Updated figure

Figure 7 Total Mobility trip cost breakdown.

Central government began reviewing Total Mobility in 2024. It is therefore important that ORC be flexible in its approach to Total Mobility, as the nature and details of the scheme may change.

Total Mobility policies	
TM P1	Service provision: provide Total Mobility services that are accessible, useful and available for people with long term impairments that are unable to access regular public transport safely, reliably and with dignity.
TM P2	Collaboration: collaborate with Ministry of Transport and NZTA to maximise the efficiency of the Total Mobility scheme, including by supporting the process and outcomes of the Total Mobility review.
TM P3	Operator and agency eligibility: develop standardised frameworks to assess the eligibility of potential and existing transport operators and mobility agencies in a way that serves disabled people with a diverse range of needs and maintains good value for money.
TM P3	Procurement: Total Mobility will be procured in accordance with the NZTA Procurement Manual and ORC's Transport Activities Procurement Strategy, and adhering to guidance set out in NZTA Total Mobility Scheme: a guide for local authorities, with a focus on achieving access and value for money.
TM P4	Affordability: investigate potential barriers to Total Mobility's affordability for passengers, including the \$37.50 fare subsidy cap, subject to financial viability and the outcome of the central government's Total Mobility review.

TM P5	Wheelchair accessible vehicles: support transport operators by providing hoist installation funding to incentivise investment in wheelchair-accessible vehicles.
Total Mobility actions	
The Council will:	
TM A1	Ensure Take that reasonable and actionable measures are taken to ensure operators and agencies meet their contractual eligibility and contractual obligations , including comprehensive auditing of vehicles, claiming , training, and health and safety.
TM A2	Develop a standardised operator and agency contract procurement process to reduce barriers to entry, promote transparency, and resourcing, in a way that serves disabled people with a diverse range of needs while and maintainings good value for money, and enable wider geographic coverage for eligible operators and agencies.
TM A3	Define eligibility for Total Mobility users according to the NZTA criteria, along with specific interpretations by ORC as set out in Error! Reference source not found.
TM A4	Explore options to provide payments for agencies conducting assessments to promote agency retention.
	Review the current \$37.50 fare subsidy cap as a potential barrier to accessibility. Collaborate with other regions to understand the impacts on user behaviour and expenditure a higher fare cap would have.
<u>TM A5</u>	<u>Periodically review Total Mobility fare subsidies in line with Annual Plan and Long Term Plan processes.</u>

2.8.2 Community transport

Community transport is a not-for-profit service established, funded and operated by community entities to enhance transport access in areas where traditional public transport is not feasible. While there are several community transport providers in Otago, ORC does not currently provide them with financial support. This leaves many of our isolated communities with limited access to essential services, including the Dunedin or Queenstown hospitals.

A study of Otago’s community and accessible transport has been undertaken to provide ORC with insight into potential community transport models that can be co-designed with community entities so they can run their own community transport services. This study will be used to guide working with our communities in the establishment of a subsidised community transport programme as part of Otago’s public transport network.

Community transport policies

CT P1	<p>Community transport criteria: provide support for community transport services where all the below criteria are met:</p> <ul style="list-style-type: none">• There is a demonstrated need for a transport service in the community• There is no alternative public transport service available to the community• There is willingness by members of the community to set up, operate and maintain a trust or similar non-profit structure to oversee the governance of the service, and for people to volunteer as drivers• There is sufficient funding available to support the establishment and administration of the trust and the purchase of vehicle(s)• The establishment of the trust has the support of the relevant territorial authority
CT P2	<p>Community transport support: support for community transport services will be assessed on a case-by-case basis and may include:</p> <ul style="list-style-type: none">• Council staff assisting local groups to establish a trust or service in a new area• Financial grants towards vehicle purchase/replacement and operation, and trust administration costs, subject to availability of funding• Provision of necessary supporting technology to make community transport services easier to manage and more accessible for users, subject to availability of funding• Where possible, leverage ORC's purchasing ability to obtain best value for community vehicle/hoist purchase and other professional services such as driver training.
Community transport actions	
The Council will:	
CT A1	Develop a framework for identifying and prioritising a community transport programme that supplements our core public transport network.
CT A2	Collaborate with our partner agencies and community organisations to develop a shared vision for community transport, applying data-driven approaches and community engagement to identify challenges and opportunities and co-design solutions.
CT A3	Trial a community transport service in a selected area with the intention to scale up the service based on the trial's outcomes and community needs.
CT A4	Develop a framework to fund and support a robust community transport system in Otago in alignment with policies CT P1 and CT P2.

CT A5	Prepare community transport projects for inclusion in future annual plans, long-term plans, regional public transport plans, and relevant business cases.
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Case study: Pīkau community transport programme in rural Northland

In 2024, the mobility company Liftango collaborated with Ngātiwai iwi to launch a pilot community transport programme providing an on-demand bus service to under-served Māori communities in rural Northland. Named Pīkau, which means ‘to carry on the back’, the community-led programme facilitates access to maraes, hospitals and supermarkets between Whangaruru and Whangārei, 71 kilometres away. The programme is co-designed, led and owned by Ngātiwai iwi and is funded by the Hoe ki angitū-NZTA Innovation Fund. The programme has produced significant community benefits, according to Ainsley Hughes, Liftango’s Project Lead for Pīkau:

“My time in Northland working with community members on the co-design of Pīkau only reinforced how vital transport is for creating better health, well-being and social outcomes. All too often we see industry conversations about transport focusing on cost savings and efficiency metrics, ignoring so many of the critical social benefits a service like Pīkau brings to the community. The willingness and enthusiasm of our project partners to support Pīkau is an excellent step forward in refocusing this narrative on equity.”

Many of Otago’s communities face similar transport disadvantages as those in Whangaruru, and the Pīkau case demonstrates the potential benefits community transport can bring to under-served areas.



3 Focus area 2: Build trust

Objective: Proactively engage with communities and organisations, including iwi, to build trust and ensure public transport investments align with stakeholder priorities.

A well-functioning public transport system requires ORC to collaborate with our partner agencies, communities and other relevant stakeholders. This collaboration involves the cultivation of strong working relationships built on trust. Without trust, we will struggle to navigate challenges and deliver an effective public transport system Otago communities deserve.

We will focus on three strategies to build trust with mana whenua, our partner agencies and key stakeholders:

- Adopting an equity-focused approach for improving access for transport disadvantaged people
- Embracing meaningful engagement processes
- Building collaborative working relationships

3.1 Our equity-focused approach

ORC will use an equity-focused approach in delivering public transport, allocating resources fairly to improve access to opportunities for transport disadvantaged people. This differs from an equality approach, where resources are allocated on an equal basis for all but may not adequately address the specific needs of transport-disadvantaged people (**Error! Reference source not found.**).

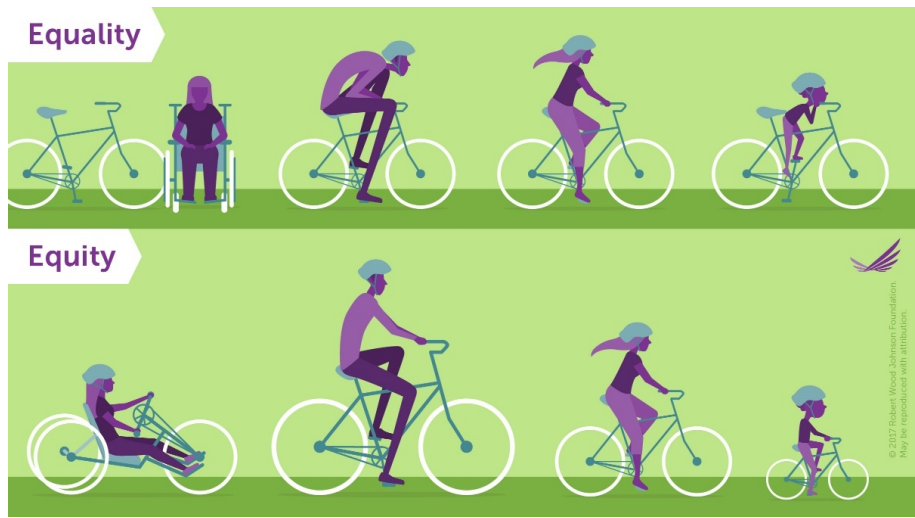


Figure 8 The difference between equality, which treats everyone the same regardless of their specific circumstances, and equity, which involves addressing individual needs to achieve fairness. (Source: Robert Wood Johnson Foundation, 2017)

ORC's equity-focused approach is based on three principles:

1. **Community engagement:** ORC will proactively engage with communities that may be underrepresented in decision-making processes regarding public transport.

2. **Access:** residents across Otago can safely access multiple transport options to reach their destination.
3. **Address lack of historical disinvestment:** ORC will collaborate with our partner agencies to invest in areas historically underserved by transportation projects to improve safety for people walking, cycling and using mobility assistance to access public transport services.

Equity policies	
EQ P1	Decision-making: equity will be at the forefront of public transport decision-making.
Equity actions	
The Council will:	
EQ A1	Review and analyse public transport data, including patronage statistics, service frequency and coverage, and demographic data to identify patterns of inequity in service provision and investment.
EQ A2	Conduct meaningful engagement with transport-disadvantaged people that goes beyond requesting feedback, encouraging them to articulate their public transport needs and co-create solutions through workshops, meetings, focus groups and surveys.
EQ A3	Prioritise public transport investments and policies that increase patronage for transport-disadvantaged people while also maximising operational efficiency and managing the trade-offs between patronage- and coverage-oriented networks.
EQ A4	Collaborate with partner agencies and disability advocacy organisations to explore the development of a Public Transport Disability Action Plan.

Case study: Bringing more public transport to Ōamaru

Ōamaru is the largest town in North Otago (population ~14,000) and is the main service hub for rural communities in the Waitaki Valley. It is home to many transport-disadvantaged people, including students, retirees, former refugees and Māori and Pasifika communities. Ōamaru has historically lacked public transport investment, and most residents have few transport options, forcing them to rely on private cars.

Ōamaru features a relatively high population density with the town centre, supermarkets and industrial area centred around a single corridor (State Highway 1). These conditions are ideal for public transport, as a high-frequency fixed-route bus service could improve

access to opportunity for a significant number of people⁵. For example, a bus service from the North End to Weston via the Historic Precinct could serve 10,400 people within a 10-minute walk of a likely bus stop. Similar bus services have proven successful elsewhere in New Zealand; Horizon Regional Council's introduction of a similar high-frequency service in 2023, nicknamed 'The Tide', has become one of Whanganui's most popular services.

ORC has not received central government funding to support a trial bus service within Ōamaru. Nevertheless, ORC remains committed to improving transport options for people living in Ōamaru and investigate and trial a bus service between Ōamaru and Dunedin in the near future.

At present, ORC offers Total Mobility services to transport-disadvantaged people, serving over 600 people in Ōamaru with 16 vehicles, including two wheelchair-accessible vehicles.



3.2 Our engagement process

ORC aspires to go beyond our statutory consultative responsibilities to ensure public transport decisions are informed through meaningful engagement processes. We aim to foster open and honest dialogue with stakeholders to build the trust necessary for a successful public transport system now and in the future.

We will follow He Mahi Rau Rika: Otago Regional Council Significance, Engagement and Māori Participation Policy to ensure that public transport decision-making is transparent and equitable. We also recognise the importance of sharing the knowledge and wisdom of mana whenua and that engagement with iwi is based on the principles of Te Tiriti o Waitangi/The Treaty of Waitangi.

Engagement policies	
E P1	Relationships: strong relationships with Otago's diverse stakeholders are developed and maintained so public transport priorities and investments align with their needs, <u>interests, and aspirations</u> and interests .

⁵ Otago Regional Council (2023) Community and Accessible Transport Study (CATS)

E P2	Engagement: our stakeholder engagement processes adhere to He Mahi Rau Rika: Otago Regional Council Significance, Engagement and Māori Participation Policy.
Engagement actions	
The Council will:	
E A1	Engage in meaningful open and regular dialogue with our partner agencies and key stakeholders to align expectations, identify and address inefficiencies and opportunities, and optimise the operation of our services <div>diverse stakeholders interested in public transport to understand their transport needs.</div>

3.3 Collaborative working relationships

Developing collaborative working relationships with diverse stakeholders is essential for the success of our public transport system. For example, we can enhance the operational efficiency of our daily operations and improve strategic decision-making by working closely with our partner agencies, including public transport operators, NZTA and territorial authorities.

There are also opportunities to attract co-funding, combine work programmes and complete transport projects by working with other groups. These relationships may be particularly important for us to access new funding sources to make public transport improvements when government funding is limited. This section outlines our policies and actions for developing and maintaining these important collaborative working relationships to improve public transport.

Collaborative working relationships policies	
CWR P1	Relationships: collaborative working relationships are developed and maintained with our partner agencies and key stakeholders to increase operational efficiency, improve strategic decision making and support transport projects.
Collaborative working relationships actions	
The Council will:	
CWR A1	<u>Engage in open and regular dialogue with our partner agencies and key stakeholders to align expectations, identify and address inefficiencies and opportunities, and optimise the operation of our services.</u> <div>Engage in open and regular dialogue with our partner agencies and key stakeholders to align expectations, identify and address inefficiencies and optimise the operation of our services.</div>

CWR A2	Work collaboratively and develop joint work programmes with our partner agencies to integrate public transport projects and investments that align with each party's respective priorities and capabilities.
CWR A3	Support the sharing of information and data with and between our partner agencies, operators, and relevant stakeholders to inform future planning, and understand transport trends, changing demands, growth and technological change.

ORC aims to develop collaborative working relationships with..

Public transport operators: ORC regularly collaborates with PTOs to address service delivery issues and customer feedback, change routes, and monitor network performance. This collaboration is crucial for ORC to refine network performance, identify areas of improvement and evaluate how we meet regulatory requirements.

Partner agencies: ORC aims to collaborate with territorial authorities and NZTA, which will enable us to coordinate work programmes along shared priorities and proactively meet communities' transport needs. This is important in the Queenstown-Lakes district, which is undergoing rapid growth and development, and in the Central Otago, Clutha and Waitaki districts, where public transport is lacking.

In recent years, ORC, ~~DCC and NZTA~~ and Dunedin City Council have successfully collaborated to deliver significant improvements around Dunedin, such as:

- improving the safety and accessibility of bus stops in key locations including Princes Street, Dunedin Hospital, the tertiary area and Cargill's corner
- increasing the frequency of buses to Dunedin Hospital
- enhancing bus route efficiency by implementing a primary bus corridor from Dunedin Bus Hub to South Dunedin
- Mosgiel express services and improved Mosgiel peak services.

Academic institutions: ORC could potentially strengthen collaborative working relationships with academic institutions, including the University of Otago and Otago Polytechnic. Doing so would enable us to exchange knowledge, respond to new research and collaborate on public transport projects and programmes that improve public transport while mutually benefitting students, academic institutions and ORC.

Local communities and organisations: ORC can collaborate with local communities and organisations in conjunction with our territory authorities to support community-led projects that improve public transport infrastructure and capacity.

4 Focus area 3: Environmental sustainability

Objective: Invest in a public transport system that ~~promotes the~~ reduces dependence on private vehicles, promotes best possible positive environmental outcomes ~~regarding greenhouse gas emissions, pollutants and~~ supports sustainable urban planning and development ~~land use~~.

Transport is a major contributor of greenhouse gas emissions in Otago. This is partly because many of our communities lack transport options and must rely on private cars as their primary mode of travel. The lack of transport options in Otago has environmental consequences.

The cumulative consequence of increasing private car use has led to increased traffic congestion, greenhouse gas emissions and the emission of harmful pollutants. This results in poor air quality and an elevated risk of respiratory illnesses. If we want Otago's environment and communities to be healthy and connected, it is crucial that people have multiple transport options to get where they want to go, including via public transport, walking and cycling.

ORC is committed to providing communities with more transport options and better environmental outcomes regarding greenhouse gas emissions, pollutants, and land use. Achieving these outcomes will require us to take a holistic view of the transport sector's environmental impacts. Our approach to reducing the environmental impacts of public transport is focused on two key topics: integrating land use planning with public transport and decarbonising our public transport fleet.

4.1 Integrating land use planning with public transport

Reducing the environmental impact of Otago's transport sector will require a greater proportion of people travelling by public and active transport compared to private cars. To achieve this goal, we must provide useful and frequent public transport services in urban areas. However, it is difficult to provide such services equally across all urban areas. This is because some areas have low population densities, which make it more expensive and less efficient to deliver public transport while maintaining a low cost to ratepayers (**Error! Reference source not found.**).

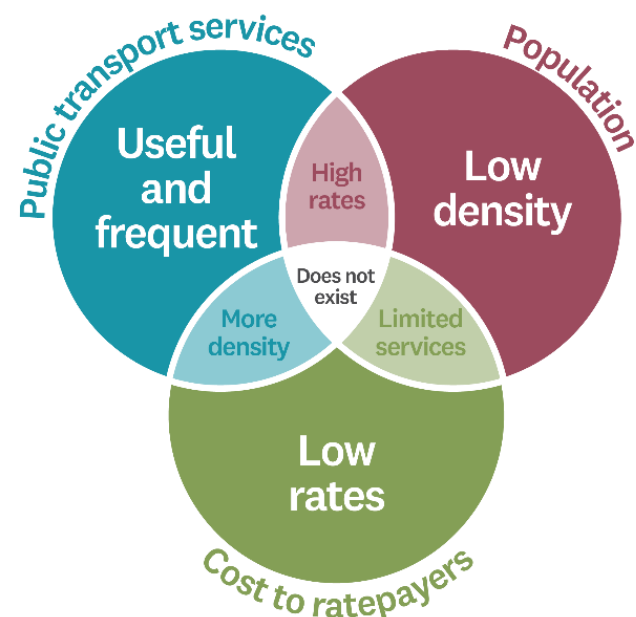


Figure 9 ORC must consider the trade-offs between population density, service provision and cost to ratepayers when making public transport decisions.


ORC’s capacity to provide useful and frequent public transport depends on the presence of well-functioning urban environments, which in turn relies on urban form factors of proximity, linearity, connectivity, and density as outlined in Appendix E and transit-oriented development principles outlined in Appendix F. The policies and actions in this section outline ORC’s commitment to collaborate with key stakeholders to plan well-functioning urban environments that support public transport and minimise environmental impact.

Land use policies	
LU P1	<p>Supporting development: ORC will collaborate with territorial authorities and NZTA to support development of new urban areas, redevelopment and/or the expansion of existing urban areas that enable viable frequent public transport service provision through the following features:</p> <ul style="list-style-type: none">• Acknowledge the unique characteristics and challenges of places• Consistency with the urban form and transport design factors such as proximity, linearity, connectivity, and density, as outlined in Appendix E
LU P2	<p>Sufficient services: ORC will not provide public transport services sufficient to enable well-functioning urban environments where the nature and location of the proposed urban development is inconsistent with the urban form factors of proximity, linearity, connectivity, and density, as outlined in Appendix E.</p>
Land use actions	

The Council will:	
LU A1	Use statutory planning processes and proactively engage with relevant stakeholders, including developers and territorial authorities, to ensure decisions regarding land use, the development of new urban areas, redevelopment and/or the expansion of existing urban areas are well integrated with existing and potential public transport services and infrastructure in line with the urban form factors outlined in Appendix E.
LU A2	Proactively engage with stakeholders involved in land use, urban development and transport planning around policy and investment to support useful and frequent public transport services in well-functioning urban environments that align with transit-oriented development principles, as outlined in Appendix F.

Case study: Queenstown Lakes Spatial Plan: Grow Well Whaiora Partnership

The Grow Well Whaiora Partnership between Queenstown Lakes District Council, Kāi Tahu and central government was established in 2021 to develop a long-term strategy and investment plan for future development in the Queenstown-Lakes area. The partnership delivered the Queenstown-Lakes Spatial Plan (2021), which established urban outcomes such as ‘Public transport, walking and cycling is the preferred option for daily travel’. Achieving this goal will require coordination between ORC and relevant stakeholders to ensure land use is concentrated, mixed and integrates well with public and active transport networks. ORC’s policies and actions to integrate land use planning with public transport complement those in the Queenstown-Lakes Spatial Plan, and will be crucial to meeting our transport, climate and environmental goals outlined in ORC’s strategic directions 2024-2034.



4.2 Decarbonising our bus fleet and related infrastructure

Decarbonising our bus fleet and related infrastructure is a crucial step towards reducing our environmental impact, as it limits harmful pollutants and carbon emissions, improves air quality and reduces noise in our communities.

In 2021, ORC successfully trialled one electric bus along multiple routes in Dunedin, paving the way for the full electrification of our bus fleets in Dunedin and Queenstown. **Error! Reference source not found.** shows the expected timeline ORC will roll out electric buses over the next few years to meet central government’s target of a fully decarbonised public transport bus fleet nationwide by 2035.

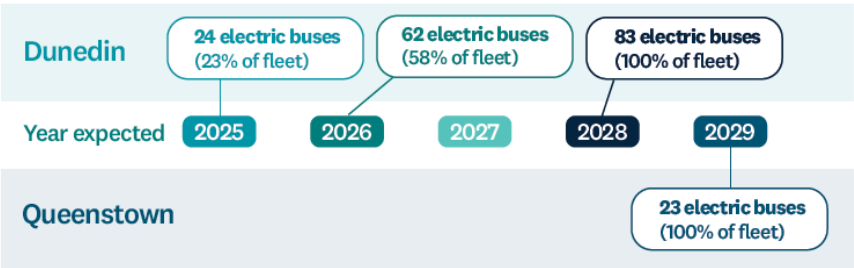


Figure 10 The expected dates ORC will roll out electric buses in Dunedin and Queenstown. These figures are subject to changes to the operating environment.

Decarbonisation policies	
DC P1	Decarbonised fleet: deploy a fully decarbonised public transport bus fleet by 2035 while retaining the flexibility to use diesel buses as a secondary option to meet operational needs.
DC P2	Supporting infrastructure: new and existing charging infrastructure will align with NZTA charging design principles and, when practicable, be powered by renewable energy sources.
Decarbonisation actions	
The Council will:	
DC A1	Phase out diesel buses in favour of zero-emission electric buses when procuring new unit contracts.
DC A2	Coordinate with service operators and partner agencies, including through procurement processes, to ensure the bus fleet, charging stations, network changes and supporting infrastructure are strategically planned and maintained in a way that considers long-term environmental implications.
DC A3	Investigate and implement strategies to source electricity for charging stations from renewable energy.

5 Focus area 4: A connected and integrated network

Objective: Deliver a reliable and convenient public transport system that enhances personal freedom and access to opportunities.

Designing a public transport network requires care. Good public transport serves many different types of travel at once, and we cannot deliver a service that meets everyone's needs perfectly. However, with careful design of our services and infrastructure, we can maximise the usefulness and legibility of our network, so that it works as well as possible for as many people as possible.

In our objective, we use the following terms:

Reliable: the service is dependable and available when we say it will be.

Convenient: the service fits with people's needs.

Access to opportunities: our services allow people to get to where they want to go to participate in education, employment, social and recreational activities.

Personal freedom: our services support people's independence: it's not just for travelling when they *need* to, it's for travelling when they *want* to.

5.1 How we design our network and services

1. **Serve diverse trip types:** we aim to provide services that connect people to diverse destinations across an urban area, including restaurants, shops, beaches, parks, and libraries. We want our services to be frequent throughout the day, seven days a week. We can achieve this principle by designing services that support complex travel patterns that are time and cost efficient.
2. **Prioritising a patronage-oriented network:** we must balance two competing goals when designing public transport services: patronage and coverage. A patronage-oriented network focuses on high demand areas, has many frequent services, and can effectively compete with cars, maximising fare revenue and reducing congestion. In contrast, a coverage-oriented network provides access to as many areas as possible and provides greater access for transport-disadvantaged people, but may result in lower patronage and less fare revenue. We see patronage-oriented networks as the best approach for Otago's environment and communities to be healthy and connected while also acknowledging the importance of maintaining existing coverage levels. **Error! Reference source not found.** depicts the outcomes and trade-offs between patronage and coverage service design.
3. **Mode-neutrality:** public transport should improve people's access to opportunities regardless of whether they are travelling by bus, ferry, train, tram or any other mode. At present, buses are the dominant transport mode in Otago because they are cost-efficient, can adapt to changing demand and can serve a wide range of areas. We also acknowledge the importance of being adaptable in the modes we support in response to changing community needs and technological advancements.

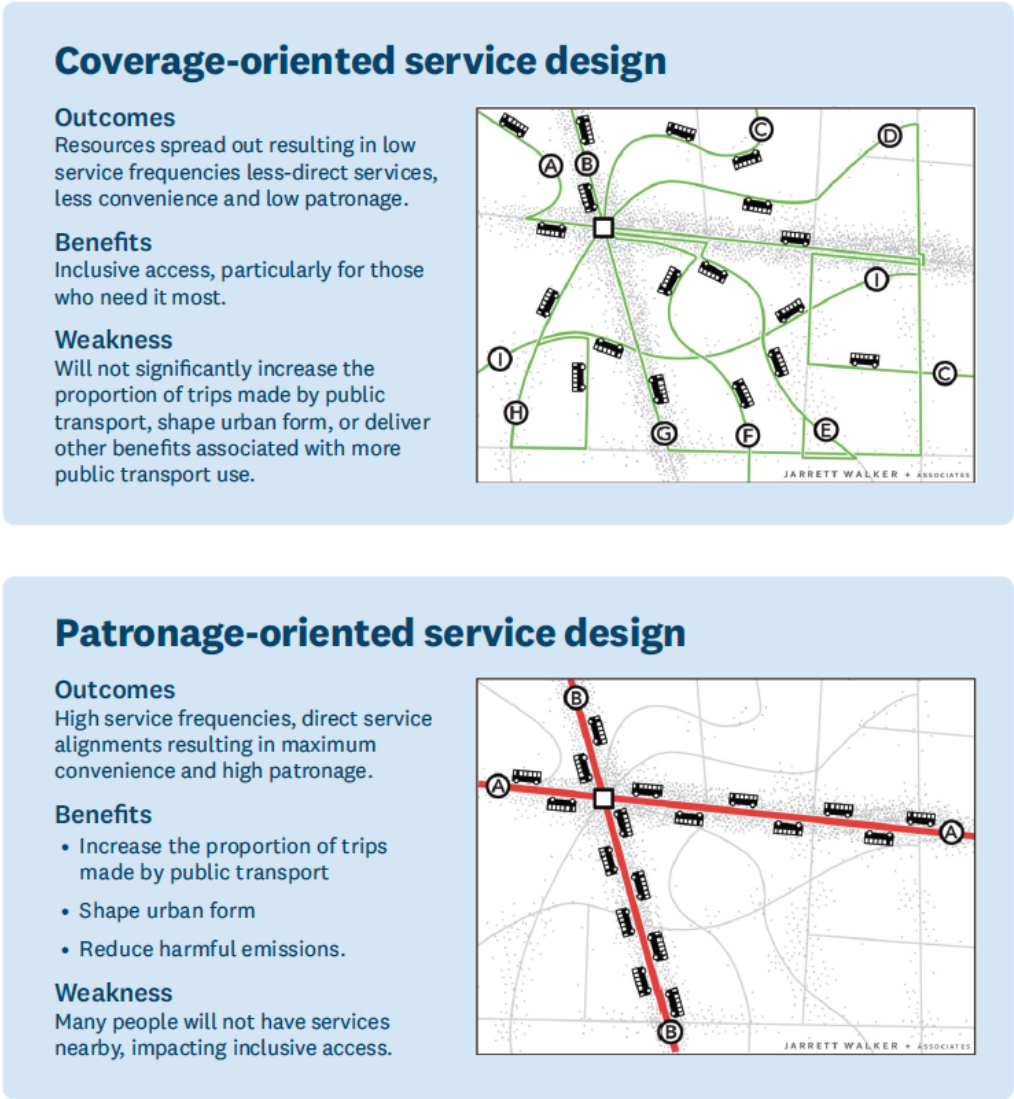


Figure 11: Patronage vs. coverage service design (Source: Jarrett Walker & Associates, 2018)

Service design policies	
SP P1	<p>Design principles: public transport services are designed in a way that:</p> <ul style="list-style-type: none">• serve diverse trip patterns• maximise frequency• avoid unnecessary duplication of service• operate full frequencies across long service hours. <p>The following design practices will guide our decision-making (where these come into conflict, a reasonable balance will be sought):</p> <ul style="list-style-type: none">• Direct service, with travel times as competitive with private vehicle travel times as practical

	<ul style="list-style-type: none">• Maximise access and travel options to town centres and other major trip attractors, such as educational institutions• Integrate with surrounding land use and operate through the heart of communities, rather than around the edges, to maximise the number of people and destinations within walking distance of a service• Operate on suitable streets, avoiding diverting around narrow back streets and staying on wider main roads• Minimise the number of transfers passengers need to make• Support seamless transfers, network function and efficiency• Support connections with other modes of transport, including walking for all trips, cycling (particularly in areas with strong identified demand or potential demand for cycling), and private vehicles (in the cases of longer trips, or to divert car parking away from central areas)• Services that overlap for significant sections of their route will be designed and timetabled in a way that provides a more frequent combined service over the common section and more opportunities to transfer.
SD P2	Trade-offs: the public transport network should be simple and designed in a way that prioritises patronage while also acknowledging the need to deliver quality coverage to support equitable access as much as possible with the resources available.
SD P3	Service design factors: ORC will consider the following factors when assessing coverage in a service design: <ul style="list-style-type: none">• Walking distance to the nearest stops• Steepness of streets used to access stops• The quality of the walking infrastructure• Access to return trips• Cycling access to bus stops• Private vehicle access to bus stops for longer-distance trips.
SD P4	Adding or changing services: the following principles will guide decisions on whether and how ORC adds new services or makes changes to existing services: Guiding principles for new services: <ol style="list-style-type: none">1. Accessibility and support from local communities2. Potential to increase patronage at present and under expected growth in the next 10 years3. Consistency of land use with the urban form factors outlined in Appendix E4. Quality and extent of supporting public transport infrastructure and multi-modal access5. Adherence of a new service's area with the service design principles of serving diverse trip types, prioritising a patronage-oriented network and mode-neutrality6. Cost, revenue, and funding projection support the long-term viability of the new service

	<p>7. New services may initially be implemented on a trial basis before integrating them into the network on an ongoing basis.</p> <p>Guiding principles for changes to existing services:</p> <p>Where a service fails to consistently meet patronage expectations, ORC will take the following actions before reducing the level of service or ending the service:</p> <ol style="list-style-type: none">1. Investigate the patronage potential of the service2. Identify and assess options to improve the service to attract patronage (e.g. route changes, promotional activities or infrastructure improvements)3. Consider other ways of delivering the service4. Consider combining the service with others or shortening the service to end at a key stop or destination.
SD P5	<p>Mode neutrality: public transport will be delivered using the most appropriate mode (e.g. bus, ferry, <u>railtram</u>, <u>cable/rope technologies</u>, etc.) to meet demand, purpose, community need and value for money.</p>
SD P6	<p>On-demand services: in areas where fixed-route services are inefficient at providing coverage, on-demand services should be considered as an alternative. The following principles should apply to the use of on-demand services:</p> <ul style="list-style-type: none">• The value of on-demand services should be evaluated on a like-for-like basis with cost-equivalent fixed-route alternatives.• Except when highly targeted in nature, on-demand services should be integrated, as much as practical, into Orbus branding, fare payment and fare structures.• <u>The impact of on-demand services on commercial small-vehicle markets should be considered in decisions to implement on-demand, especially with regards to Total Mobility operators.</u>• <u>On-demand services should be operated with fleet that comply with the Requirements for Urban Buses</u>• <u>Changes to on-demand services are based on the same principles as fixed-route services (see SD P4 above)</u>

5.2 Our public transport routes and service levels

The foundation of our network is our well-performing urban networks in Dunedin and Queenstown. These urban networks primarily consist of integral services operating under subsidy. Urban services are classified according to their network function as **rapid, frequent,** or **connector** services, supplemented by **targeted** services to fulfil special purposes (**Error! Reference source not found.**).

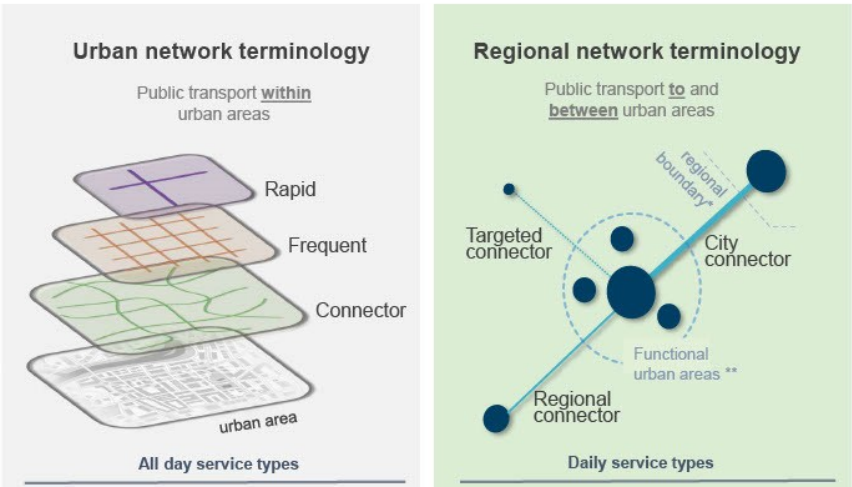


Figure 12: Public transport network terminology (Source: NZTA)

Regional services in Otago primarily consist of exempt services operating without subsidy (the exception being the current Palmerston-Dunedin service). These services are integral to the wider regional network, and ORC has an interest in enhancing the regional network with subsidised services through this RPTP. The regional network is classified as consisting of **regional link** or **city link** services at **primary, regular, or daily service** levels, along with **targeted** services. Some examples of these are outlined in **Error! Reference source not found.** below. **Error! Reference source not found.** details these network service layers in greater detail including how they are incorporated into Otago's network.

Table 3 Examples of different types of public transport services.

<div><div>Urban Rapid example</div><div><p>Auckland's rapid NX1 and NX2 services together form a north-south spine of the North Shore's bus network, operating in the dedicated Northern Busway for much of their length. Due to the busway and its services, 30% of passenger trips crossing the Auckland Harbour Bridge are by bus, and this is expected to increase over time⁶.</p></div><div><div></div><div>[placeholder image]</div></div></div>
<div><div>Urban Frequent example</div><div><p>Queenstown's Route 1 operates between Remarkables Park, Wakatipu High School, and Queenstown Airport to the west of Frankton, along Frankton Road through Queenstown to Fernhill and Sunshine Bay.</p><p>Services operate every 15 min from 6am-7pm, and continue half-hourly past midnight, seven days a week. This makes this route one of the most intensively operated public transport services in New Zealand outside of Auckland, Wellington, or Christchurch.</p><p>The ability to run such high levels of service seven days a week comes from the combination of population and employment density, and visitor numbers to Queenstown that drives high all-day and all-week demand.</p><p>[image relevant to route 1 QT]</p></div></div>
<div><div>Urban Connector example</div><div><p>Dunedin's Route 50 operates from St Clair Park and Corstorphine in the city's south-west, through the city centre to Helensburgh in the north-west. Services run half-hourly from around 6am-7pm on weekdays, and hourly from 7pm to 11pm in evenings and all day on weekends.</p><p>The service mostly runs directly on main roads but includes some diversions to direct routing that increase the coverage achieved by the service, notably by looping around the St Clair Park area.</p></div><div></div></div>

⁶<https://www.aucklandcouncil.govt.nz/plans-projects-policies-reports-bylaws/our-plans-strategies/auckland-plan/transport-access/Pages/the-northern-busway.aspx>

Regional Link example

Dunedin's Route 1 is a Secondary Regional Link service.

The service provides peak-hour and limited off-peak and weekend connections, from the city of Dunedin to several coastal townships to its north.

Peak trips are subject to high demand from commuters and school students, while off-peak trips allow people to take a day trip to these towns without requiring a private vehicle.

[image relevant to Palmerston service – should emphasise rural / small-community nature of service]

City Link example

InterCity's Dunedin to Queenstown service is a Daily City Link service, connecting Otago's largest urban areas of Dunedin and Queenstown via intermediate centres including Balclutha, Alexandra, Clyde, and Cromwell, and with connections to services across the South Island. The service operates on a commercial basis, outside of ORC's control, but forms an integral part of Otago's public transport network and is recognised as such by this RPTP.

[relevant image if one can be obtained]

Targeted example

Dunedin's route 39 is a public transport service that, while available to the general public, is designed to serve school travel, with one trip per day in each direction to connect Green Island with schools on the hills above central Dunedin.

The service exists because there is high demand for travel between Green Island and these schools, but there is no easy way to make this connection on our network of all-day Connector and Frequent services. If future routes were able to make this connection, the targeted service would no longer be required, and this school travel pattern could be integrated into all-day routes.

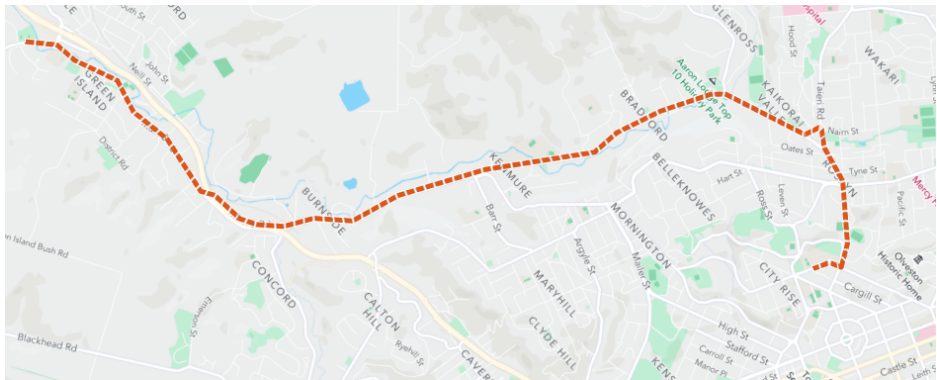


Table 4 The different network service layers and how they can be incorporated into Otago’s public transport network. See Appendix G for a full list of integral services.

	Role and function	Key characteristics	Service hours and frequency targets	Infrastructure targets
	<ul style="list-style-type: none">• Moves a very high number of people• Strongly shapes the public transport network, urban form and land development	<ul style="list-style-type: none">• Turn-up-and-go frequencies• High-capacity vehicles• Travel times competitive <u>with</u> or even faster <u>than</u>with private car	<ul style="list-style-type: none">• 6am – 8pm: every 10 minutes or better• 4am-6am, 8pm – 1am : every 15 minutes or better	<ul style="list-style-type: none">• Delivered by high-capacity vehicles on a fixed route (bus, tram, etc.)• Dedicated right-of-way with limited interactions with other traffic• Mostly premium and intermediate stops
	Our current services	Otago lacks urban rapid services, though some elements of urban rapid services apply where many routes overlap (e.g. Dunedin Bus Hub).		
	Our aspirations	No current plans to implement full rapid service, but: <ul style="list-style-type: none">• we want to enhance key spines, where the combined service may approach rapid standards• we support the future study of an “off-line” rapid service in Queenstown, likely using ropeway technologies		
	Role and function	Key characteristics	Service hours and frequency targets	Infrastructure requirements
	<ul style="list-style-type: none">• Moves many people• Influences the shape of the public transport network, urban form and some land development	<ul style="list-style-type: none">• High frequencies throughout the day; passengers have less reliance on the timetable as waits will be short• Direct routing on main roads to minimise running time• Travel times competitive with private car	<ul style="list-style-type: none">• 6am – 8pm: every 15 minutes or better• 4am-6am, 8pm – 1am : every 30 minutes	<ul style="list-style-type: none">• Delivered by buses on fixed routes• Bus priority infrastructure (e.g. bus lanes) in areas of high congestion• Mostly intermediate and standard-quality bus stops
	Our current services	<ul style="list-style-type: none">• One frequent service in Queenstown, three in Dunedin (including the two St Kilda services, considered together)• Service hours are shorter than above targets and Dunedin services are reduced on weekends		

	Our aspirations	<ul style="list-style-type: none">• Increase the number of frequent services, including (in Dunedin) cases where multiple connector services combine• Enhance hours of service towards above targets and full weekend frequencies• Enhance infrastructure towards targets		
	Role and function	Key characteristics	Service hours and frequency targets	Infrastructure requirements
	<ul style="list-style-type: none">• Moves a moderate number of people• Supports, but does not shape, urban form and land development	<ul style="list-style-type: none">• High service availability, but frequencies are merely regular: passengers need to coordinate their travel to a timetable or on-demand wait times• Service design principles compromised in order to achieve greater coverage	<ul style="list-style-type: none">• 6am – 8pm: every 30 or 60 minutes (extra peak services when needed to meet capacity requirements)• 8pm – 12am: every 60 minutes• On-demand services have 30-60 minute expected waiting times	<ul style="list-style-type: none">• Delivered by buses or ferries, generally on fixed routes• Some areas may be better served using on-demand service design• Operates in mixed traffic alongside private cars• Mostly standard-quality bus stops
	Our current services	<ul style="list-style-type: none">• Core networks in Dunedin and Queenstown. Most Dunedin services are half-hourly, while Queenstown services are hourly (half-hourly at peak for strongest routes). Dunedin has reduced weekend services		

	Our aspirations	<ul style="list-style-type: none">• Strongest Connector routes to be upgraded to Frequent• Implement Connector service in Oamaru and Wānaka (either fixed-route or on-demand)• Enhance hours of service towards above targets and full weekend frequencies• Enhance infrastructure towards targets• Investigate on-demand service where fixed-route services perform poorly
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types	City link: <i>Connects major urban areas to each other</i>		Regional link: <i>Connects small urban areas to a larger city</i>	
	Primary (City link or regional link) <ul style="list-style-type: none">• Same service aspirations as frequent urban services	Secondary (City link or regional link) <ul style="list-style-type: none">• Similar service aspirations to connector services, but frequency could be reduced below hourly service level to 3-6 trips per day		Daily (City link or regional link) <ul style="list-style-type: none">• 1-2 trips per day

	Our current services	No examples of primary in Otago Palmerston-Dunedin service (3-4 trips per day) is a contracted secondary service Wānaka – Queenstown service (4 trips per day) is an exempt secondary service Some exempt services, such as InterCity services, operate daily.
	Our aspirations	<ul style="list-style-type: none">• Implement contracted daily or secondary services:<ul style="list-style-type: none">◦ Ōamaru – Dunedin◦ Balclutha – Dunedin◦ Alexandra – Queenstown◦ Wānaka – Queenstown• Support the development of the wider regional network of exempt services• Collaborate with key stakeholders to explore interregional public transport opportunities such as public buses, passenger rail, or code sharing on exempt bus services.

Targeted services	Description: Targeted services are those that are integral to the network but are best delivered in a targeted manner to meet specific transport needs. Targeted services operate within the urban and wider regional networks and must represent good value for money to receive subsidy from ORC.	
	Our current services	<ul style="list-style-type: none">• Total Mobility services for people with long term mobility impairments• School services targeting school students in areas that are not serviced by the urban public transport network• Commuter services to meet the peak demand for travel to and from work• Community transport services linking people in isolated communities with other urban areas (no ORC involvement).• Special event services providing transport for people attending nearby events
	Our aspirations	<ul style="list-style-type: none">• Enhance the availability of Total Mobility, especially the availability of wheelchair-accessible vehicles• Where possible, enhance connector/frequent services to serve schools without targeted services, but offer school-targeted services where there is demand that cannot be met• Operate express commuter services where there are significant travel-time savings compared to all-day service (such as along a motorway)• Support the operations of community vehicle trusts financially and logistically• Support major event services across Otago

What about using smaller buses?

One common suggestion is to use smaller buses during off-peak hours in Dunedin and Queenstown. Smaller buses could be helpful in hilly areas or on routes that have low patronage. However, there are some barriers to introducing smaller buses in Otago:

- 1. Smaller buses are often not more cost-effective:** The largest expense in public transport is driver wages. While smaller buses may save money due to lower fuel consumption, those savings are offset by the fixed cost of driver wages, as drivers must be paid regardless of the size of the bus. Smaller buses also accommodate fewer passengers, which means less fare revenue. Additionally, investing in a new fleet of smaller buses would be costly and inefficient, as many of our current buses would sit idle and unused.
- 2. Smaller buses won't meet our future growth demands:** In 2024, we had a record-breaking number of people taking public transport in Otago, and we hope to build on these successes moving forward. As our region grows, smaller buses might struggle to accommodate higher passenger demand and contribute to overcrowding on our services.
- 3. We want to use the right tools for the job:** Bus size isn't a black and white issue—it's a question of finding a good balance. We want public transport to empower people to travel to many places in a reasonable amount of time and at a low cost. To achieve this goal, we'll choose the fleet that's right for the job.

In July 2025, we will introduce smaller buses in Mosgiel to replace routes 80 and 81. These buses will be part of an 'on-demand' bus service that uses a small, 30-person capacity, wheelchair accessible electric bus to pick people up and drop them off within a designated area in Mosgiel. People can book the bus by calling a phone number or through an app.

This initiative is just one example of how we are using the best transport option to meet community needs.

5.2.1 Our rural network aspiration: increase regional connectivity

Many people in Otago's rural areas have limited or no access to public transport, forcing them to depend on private cars to access opportunities. Although the sparse population of Otago's rural areas limits what public transport can achieve, we aim to enhance the basic level of connectivity across the region.

The following maps show the current, next ~~403-6 year~~, ~~6-10~~ -year, and 10-30 year maps outlining the **expected development** of the Otago regional network.

Table 5: Current, ~~next 3-6 year~~, ~~6-5-10~~ year, and ~~10-~~ 30-year maps outlining the expected development of the Otago regional network.

Map	Description
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Commented [JC2]: Across these maps, requesting a different symbol than the simple round dot for urban networks (Dunedin and Queenstown, Wanaka and Oamaru on later maps per annotations). Can discuss detail on request.

	<p>Current map</p> <ul style="list-style-type: none">Contracted regional service only exists between Dunedin and Palmerston.Wider network of exempt services provides regional and inter-regional connectivity along major state highways and in Queenstown-Lakes / Central Otago.Secondary state highways do not have any significant services.	<p>Commented [RH3]: Where grey line denotes integral exempt service add eg. InterCity</p>
	<p>Next 6-10 years (subject to funding and further study)</p> <ul style="list-style-type: none">New contracted services Dunedin – Balclutha, Alexandra – Queenstown to supplement exempt services.Dunedin-Palmerston service to be extended to Oamaru.Support community vehicle trusts to establish basic connectivity to the most remote areas (secondary state highways shown to illustrate this in map).	<p>Commented [JC4]: Request to add a few more intermediate towns to all the maps: Lawrence, Roxburgh, Ranfurly, Kingston just before the down-arrow on left of map.</p> <p>Also add Mosgiel; adjust the Middlemarch-Dunedin connection to connect at Mosgiel; add Outram and Dunedin Airport subject to space.</p> <p>Additionally, can we please a separate way to show distinguish the centres (Dunedin, Queenstown; Wanaka and Oamaru in the future maps) that will have a local network / local service (so that these locations are distinguished from small towns)</p>
	<p>6-10 years (subject to funding and further study)</p> <ul style="list-style-type: none">New contracted services Wanaka – QueenstownLocal Wanaka and Oamaru servicesContinue development of community vehicle trusts	
	<p>10-30 years (speculative)</p> <ul style="list-style-type: none">Main regional and inter-regional services fully integrated into contracted network of integral services.Develop daily services on secondary highways where viable.Community vehicle trusts to continue to provide basic options also (not shown).	<p>Commented [JC5]: Wanaka to Queenstown direct line should be changed from grey to red. Wanaka to Cromwell line should have grey parallel to red.</p>

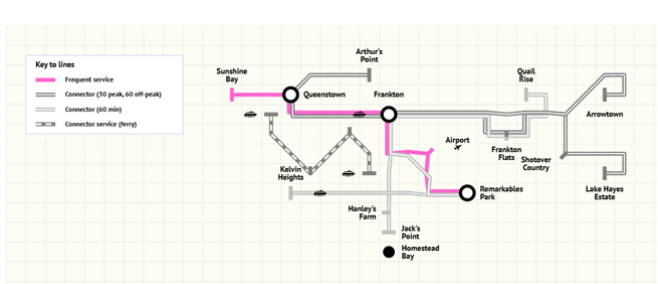
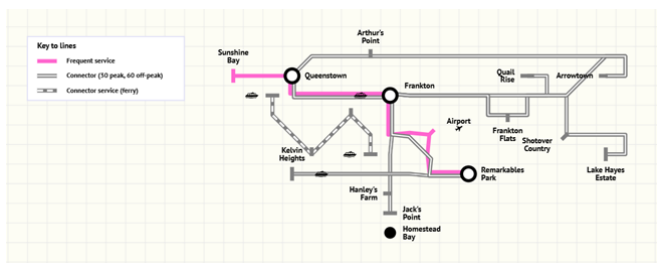
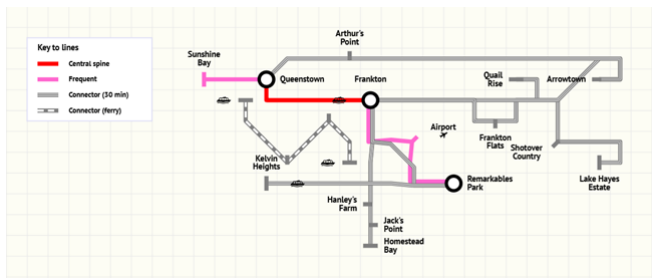
5.2.2 Queenstown urban network aspirations

Queenstown is a high-growth centre, and it is essential that the development of public transport proactively supports this growth. We plan to progressively increase service levels across the network. Due to expected long term population growth, our most popular public

transport route will likely be from the new Homestead Bay development, through existing Jacks Point and Hanley’s Farm areas, into Frankton and Queenstown. Our plan is that this, and other key routes in the network, will be served by high-capacity articulated buses. Additionally, there may be a future study of the case for other modes to serve this area, including an off-line option and a direct ferry service.

The following maps show the current, next 3-year, 3-6 year, 6-10-year, and 10-30 year maps outlining the **expected development** of the Queenstown Orbus network.

Table 6 Current, next 3 year, 3-6 year, 6-10-40 year and 10-30-year maps outlining the expected development of the Queenstown Orbus network.

Map	Description
	<p>Current map</p> <ul style="list-style-type: none">• No direct route from Queenstown to Arrowtown connection via Frankton only.• Services on combined Queenstown – Frankton spine are not coordinated to create rapid combined frequencies.• Connector services run hourly, with strongest areas having half-hourly peak services.
	<p>0-3 years</p> <ul style="list-style-type: none">• Direct Queenstown-Arrowtown connection.• All connector routes with 30-minute peak frequency.
	<p>3-6 years</p> <ul style="list-style-type: none">• All connector routes with 30-minute all-day frequency.• Timetables to be coordinated to create 7.5-minute frequency between Queenstown and Frankton.• Extension to Homestead Bay as development occurs.• Articulated buses begin to be introduced to increase capacity.• Development of on-demand services away from core routes.
	<p>6-10 years</p>

	<ul style="list-style-type: none">• <u>Additional peak services across network</u>• <u>Development of Wanaka; Alexandra regional services (not shown)</u>• <u>Wanaka local service (not shown)</u>
	<p>106-30 years</p> <ul style="list-style-type: none">• Services across network to be increased to frequent levels (per business case).• Missing road connections such as Quail Rise <u>western access road</u> are filled in, allowing more direct routes.• <u>Potential ferry to Homestead Bay (not shown)</u>.• Potential for rapid off-line service between Queenstown and Homestead Bay (not shown).• Continuing development of on-demand services away from core routes.

Commented [JC6]: Map showing new “Frequent peak” category, with Jacks Point and Lake Hayes area being in this category, while Arrowtown and Kelvin Heights remain as per 3-6 years. Can mock up on request.

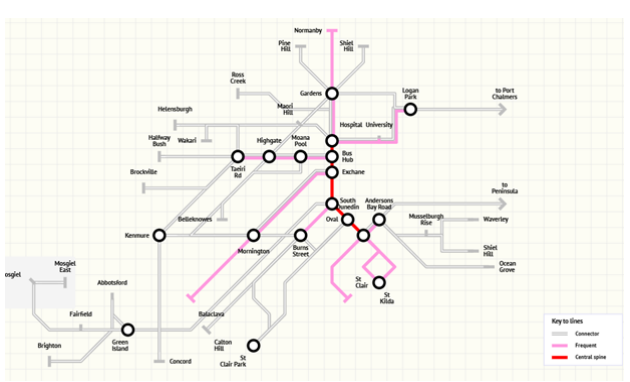
Commented [JC7]: Edit map to not show Homestead Bay leg of ferry service – no case for this at present

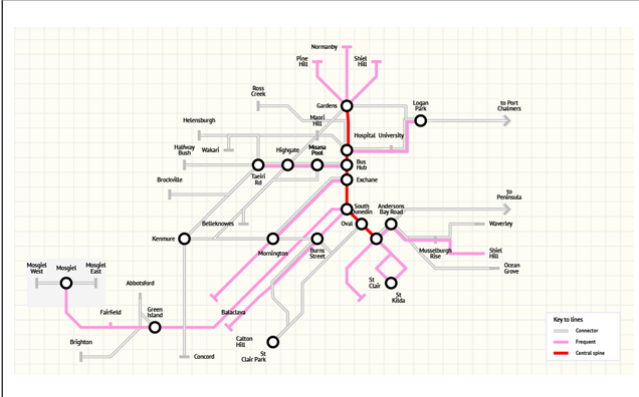
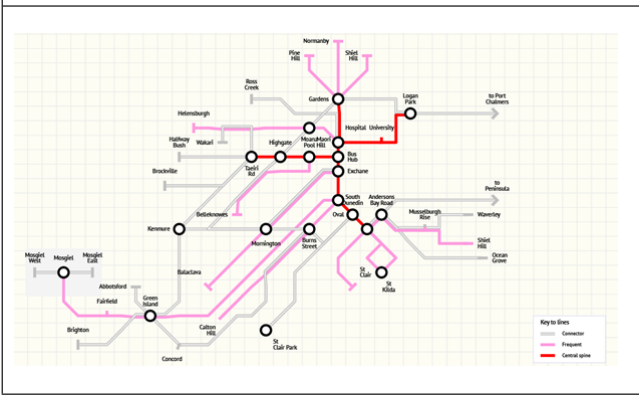
5.2.3 Dunedin urban network aspirations

Dunedin is a medium-to low-growth city with a mature public transport network. Development of this network will, with minor exceptions, be focused on enhancing existing service areas. As of 2025, ORC has an existing plan for upgrading bus frequencies across Dunedin through the Fares and Frequencies Business Case. This business case did not receive government funding in the 2024-27 National Land Transport Programme. Despite this, we are seeking to implement what frequency improvements we can, along with optimisations and route changes (still be developed).

The following maps show the current, next 10-year, and 10-30 year maps outlining the **expected development** of the Dunedin Orbus network.

Table 7 Current, next 3-6 year, 6-10 40-year and 10-30-year maps outlining the expected development of the Dunedin Orbus network.

Map	Description
	<p>Current map (July 2025)</p> <ul style="list-style-type: none">• Coordinated spine along Princes Street through the Dunedin Bus Hub.• Frequent service in six directions from the centre.• Extra peak service on strongest connector services.• Local on-demand service in Mosgiel.
	<p><u>Next 3-6 years</u></p> <ul style="list-style-type: none">• <u>Frequent service in up to 10 directions from the centre.</u>• <u>Frequent service to Pine Hill and Shiel Hill allows George St to be coordinated into an extension of the central spine.</u>

	<p>Next 6-10 years (subject to funding and further study)</p> <ul style="list-style-type: none">Frequent service in up to 11 directions from the centre.If Mosgiel service is increased to full frequent status, it can branch to serve north-west as well as north-east of Mosgiel.Frequent service to Pine Hill and Shiel Hill allows George St to be coordinated into an extension of the central spine.
	<p>10-30 years (speculative)</p> <ul style="list-style-type: none">Addition of further frequent services.Frequent services moving from 15 minutes to 10-minute frequency.Enhancement of secondary corridors (Stuart St, University) into rapid spines.Improved connectivity at Green Island.

5.2.4 Integral and exempt services

In Appendix G of this RTP, we identify which public transport services are integral to Otago's public transport network. We identify these services as integral because they are fundamental to achieving service outcomes of patronage and coverage, and delivering safe, effective and efficient public transport in Otago. They also contribute to achieving our aspirations and goals of our Strategic Directions, especially the strategic direction for transport.

Contracted services

High-quality public transport usually requires a level of public subsidy. A subsidised service operates under a service contract and is therefore within our control: we can set the terms of the contract and operate it under policies set out in this RTP. This ensures we can plan and deliver our integral services in an integrated manner.

Those integral services that we fund, or intend to fund in the next 10 years, are identified as **integral contracted services**.

Exempt Services

An exempt service is a public transport service that operates, without subsidy, on the initiative of the operator and priced at market rates. ORC can accept or refuse registration of some exempt services, and maintains a register of these services, but they are not otherwise subject to the policies of this RTP.

The process for registration and variation of an exempt service can be found on our website⁷.

⁷ <https://www.orc.govt.nz/orbus/travel-with-us/about-orbus/register-an-exempt-public-transport-service/>

Some exempt services are integral services to Otago's public transport network. Although these services are largely out of ORC's control, they deliver a part of the regional network and the outcomes we seek from public transport. We therefore identify these services as integral exempt. This means we acknowledge their importance and long-term interest in these services, but we are not currently intending to contract these services (or similar services) ourselves to bring them under our control. This may be because:

- we would like to subsidise these services in the long term but are not in a position to at present, or
- we do not see a need to subsidise these services as the current service is of good quality and already delivering the outcomes we would seek.

Notwithstanding the above, we can provide certain, limited financial support for integral exempt services, without taking full control of the services in a service contract. This can be:

- funding for small-vehicle operations (Total Mobility and community transport operations)
- funding to lower the fares of exempt services to align with other public transport services

Network form and function policies	
NF P1	<p>Basis of identification of integral services: a current or prospective public transport service may be identified as integral to Otago's public transport network on the basis that it:</p> <ul style="list-style-type: none">• supports the transport needs of Otago residents and visitors• safely, effectively, and efficiently achieves outcomes of coverage and/or patronage of public transport services• contributes to achieving the aspirations and goals of ORC's Strategic Directions (Appendix A), especially the Transport Strategic Direction.
NF P2	<p>Integral contracted services: a service may be identified as an integral contracted service when:</p> <ul style="list-style-type: none">• operating the service under contract is considered necessary to maintain the service's existence or quality• the service is funded, or future funding is actively being sought• funding the service represents good value for money for ratepayers, taking into consideration the extent to which other funding sources (such as the National Land Transport Fund) impact the cost <p>Urban and regional public transport services identified as <i>Integral Contracted</i> on the integral services table (Appendix G) will be delivered and subsidised:</p> <ul style="list-style-type: none">• in networks as outlined in Section 5.2• with forms and functions outlined in Section 5.2
NF P3	<p>Approach to delivery of integral services: integral contracted services will be allocated into contractual units and delivered through service contracts to ORC.</p> <p>Integral exempt services will be allocated into exempt units according to their mode, function, and geographic area, and will be delivered by private operators on a commercial or not-for-profit basis.</p>

NF P4	<p>Exempt services: Exempt service applications will be assessed and LTMA requirements followed.</p> <p>ORC will not support the registration of services that would undermine the performance of an existing contracted service. ORC will support the development of exempt services that deliver a part of the regional network not currently operated by contracted services.</p> <p>ORC may, in coordination with operators, promote exempt services that contribute to the region's public transport network.</p>
NF P5	<p>Financial assistance of exempt services: subject to value for money considerations, ORC may provide financial assistance to identified integral exempt services based on:</p> <ul style="list-style-type: none">• supporting Total Mobility and community transport services• supporting the affordability of passenger fares that are more in line with similar contracted services.
NF P6	<p>Targeted services: The need for targeted services will be minimised by accommodating as many trips as possible on our core network. However, subject to funding availability and value for money, targeted services may be provided under the following conditions:</p> <ul style="list-style-type: none">• In the shorter term, the service supports trips that cannot reasonably be made through other public transport services.• In the longer term, the public transport network cannot reasonably be adapted to support trips that the targeted service can support <p>Services targeted at school travel should primarily support travel to the nearest available school.</p>
NF P7	<p><u>The design and configuration of services will be periodically reviewed, considering factors such as:</u></p> <ul style="list-style-type: none">• <u>performance of services</u>• <u>their adherence to network design principles, prioritising a patronage-oriented network</u>• <u>contractual cycles</u>• <u>land use changes (including location of key services and destinations)</u>• <u>travel behaviour patterns (e.g. working from home)</u>• <u>change in the legislative, regulatory, and funding environment of public transport.</u> <p><u>Service reviews may be restricted to a small geographic area (such as a small number of suburbs) or broader (at a network level).</u></p> <p><u>Where a service review covers central areas of a network, such a review should include consideration of strategic infrastructure such as interchanges, which could have a significant impact on service design</u></p>
NF P8	<p>Urban areas: Prioritise the development of frequent services (subject to funding availability) to support mode shift and increased patronage.</p> <p>The connector service layer will be maintained to ensure wide availability of service.</p>

Commented [RH8]: This text is omitted from the draft. NF P4 has duplicated NF P5 text. To be corrected

NF P9	<p>Smaller communities: Transport solutions to improve connectivity for our smaller regional centres and communities will be prioritised and tailored for each community, matching need with availability of resources and funding according to:</p> <ul style="list-style-type: none">• <u>Potential level of usage</u>• <u>Enhancing the connectivity of the existing regional network</u>• <u>The community's willingness to pay (where NZTA co-funding is not available), e.g. through targeted rates, territorial authority contributions, fares, or private funding sources</u>
Network form and function actions	
The Council will:	
NF A1	Develop and design service improvements in line with future network structures outlined in Section 5.2.
NF A2	<p>Support Otago's regional public transport network by:</p> <ul style="list-style-type: none">• operating existing contracted services• coordinating with partner agencies and local communities to design viable⁸ regional services• providing financial and logistical support to community transport operators across the region• identifying and promoting exempt public transport services which are integral to the regional network.
NF A3	Work with our partner agencies to ensure that appropriate supporting physical infrastructure, pedestrian facilities, and wayfinding information is strategically placed to support easy and safe access to the public transport network.
NF A4	<p>Work collaboratively with key stakeholders to implement integrated packages of activities designed to achieve mode shift in urban areas. These may include:</p> <ul style="list-style-type: none">• public transport service provision• bus priority infrastructure• pricing mechanisms (fares and parking) integrated with plans for urban intensification and active transport provision• mode-shift promotion activities.
NF A5	<p>Design timetables in such a manner that they:</p> <ul style="list-style-type: none">• have timing points and accurate running times to avoid early or excessively late running• support seamless transfers between different services• to the extent that is practical, run at a consistent interval (e.g. 10 minutes past the hour)• allow sufficient, but not excessive, layover between trips so that:

⁸ Viability is defined in terms of policy SD P4 (Section 6.1).

	<ul style="list-style-type: none">○ there is sufficient recovery time between trips to ensure recovery from late running○ drivers have sufficient breaks to meet Employment Relations Act requirements○ dwell time outside residential properties is minimised○ the timetable represents value for money.
NF A6	<p>Periodically review the design and configuration of services, considering factors such as:</p> <ul style="list-style-type: none">● performance of services● their adherence to network design principles, prioritising a patronage-oriented network● contractual cycles● land use changes (including location of key services and destinations)● travel behaviour patterns (e.g. working from home)● change in the legislative, regulatory, and funding environment of public transport. <p>Service reviews may be restricted to a small geographic area (such as a small number of suburbs) or broader (at a network level).</p> <p>Where a service review covers central areas of a network, such a review should include consideration of strategic infrastructure such as interchanges, which could have a significant impact on service design</p>

5.3 Multi-modal access

A public transport system that integrates well with other modes enhances access, choice and personal freedom.

Designing and planning for seamless integration between modes, particularly walking, cycling, and shared mobility is therefore fundamental in our network approach. It is also critical to achieving our goal of reducing greenhouse gas emissions and improving air quality in our region.

Our aim is for active transport to be the preferred mode for short journeys in our urban areas for those who are able. Longer journeys should be easily and safely completed by linking modes with public transport.

We are fortunate to have iconic and attractive long-distance walking and cycling trails, as well as urban walking and cycling networks in our region. The next step is to progress the connectivity of these assets with our public transport system to enable more sustainable longer distance travel options and provide greater opportunities for more people to choose public transport.

Multi-modal access policies	
MM P1	Multi-modal access: improve the connectivity of the public transport network with active transport networks, shared mobility and other modes by collaborating with our partner agencies, operators and key stakeholders in the provision of :

	<ul style="list-style-type: none">• safe and accessible walking, cycling and micro-mobility connections to public transport services and facilities• cycling and micro-mobility parking facilities at public transport interchanges and other key locations• a means for carrying bicycles and micro-mobility on all scheduled services• reducing conflict between buses and vulnerable users such as cyclists, pedestrians and micro-mobility users using appropriate design solutions which retain access for these modes• identifying and developing locations considered suitable for park and ride facilities consistent with Policy IN P5.
MM P2	Tourism: encourage sustainable economic growth and promotion of green tourism based around public and active transport.

Multi modal access actions	
The Council will:	
MM A1	Develop a regional public and active transport connectivity strategy and programme of activities that address barriers and improve the use of public and active transport in the region.
MM A2	Continue to investigate ways to integrate cycling with use of public transport in urban areas (e.g. dedicated cycle parking at public premium public transport stops).
MM A3	Work collaboratively with our partner agencies to improve walking and cycling connections to public transport.
MM A4	Advocate and identify opportunities for provision of Provide cycle parking at strategic locations where there is evidence of demand to support greater access to the public transport network by cycling alternative modes .

5.4 Infrastructure

5.4.1 Network assets

“Network assets” refers to highly visible public transport infrastructure “out on the network”. This includes bus stops, ferry wharves, bus lanes, and some operational infrastructure that interacts with street design and urban design, such as where buses layover and drivers take breaks away from their depots.

Under the division of responsibilities in the wider transport system, a large proportion of network infrastructure is managed and/or regulated by city and district councils. The detail of this relationship varies from place to place and for different types of infrastructure. In all cases it is essential that ORC as the public transport authority collaborates closely with city and district councils, and NZTA in its Road Controlling Authority function, to deliver infrastructure that supports the public transport network.

Boarding locations

Bus stops are the network assets with greatest immediate passenger impact. The comfort, convenience, and safety (perceived and real) of these waiting areas has a significant impact on how users interact with public transport. In developing our network of bus stops, we will consider factors such as:

- **Stop spacing:** close-together stops may make public transport more accessible, but can significantly slow down a service, and the increased number of stops may mean that investment in the quality of stops needs to be spread more thinly.
- **Pairing:** if a stop is available for trips in one direction, there needs to be another stop available for return trips. This means that stops should generally be paired, close to each other on opposite sides of the road, and sections of route that only run in one direction of a road should be avoided where possible.
- **Accessibility:** improvements to the design of bus stops and their surrounding environments can have a significant positive impact on disabled and transport-disadvantaged people.
- **Public transport's place on streets:** well-designed public transport infrastructure can enhance the street environment and give permanence to public transport's place in this environment.

Although we would like to bring all our stops up to a high standard in all of these areas, the realities of funding are such that there will be far more improvements we would like to make than we can deliver, so we need prioritise. To support prioritisation, we vary our expectations for bus stops depending on the nature of the stop, as shown in **Error! Reference source not found.** below.

Most stops in Otago are standard or intermediate service levels, with some premium stops on frequent routes and rapid corridors, and some basic stops serving lightly-used locations.

Table 8 Bus stop categories outlined in the NZTA One Network Framework.

Bus stop type	Description	Typical bus stop design
Interchange	Key network location where many services meet and connections between services across a wide area of the network are available. An interchange will be used by many buses at once, and sees a very high level of foot traffic, requiring a sophisticated design with significant facilities which are given strong priority. Otago's urban networks will not have more than 1-2 interchanges.	[diagram]
Premium	A very heavily used bus stop, operating in a place with very high amenity. The quality of the facilities is of high priority. May operate as an interchange for a small set of services. Only a small number of premium stops are expected across the network.	[diagram]
Intermediate	A heavily used bus stop, operating in a place with high amenity. Facilities are of increased quality. A minority of stops, but not an insignificant number, are expected to be intermediate.	[diagram]
Standard+	A moderately used bus stop with a standard level of service. Infrastructure is of a standard design and there should be a shelter.	[diagram]
Standard	A moderately to lightly used bus stop with a standard level of service. Infrastructure is of a standard design and a shelter is not required.	[diagram]
Basic	A very lightly used stop with a low level of service and requiring minimal infrastructure. Only a minority of stops are at a basic level.	[diagram]

Bus stops are graded into these categories guided by the One Network Framework. The exact details of what infrastructure can be expected at a stop varies depending on its local detail. For example, a stop where very few passengers board but many disembark will not require a shelter, but still requires good accessibility and pedestrian connectivity.

However, without regards to any specific stop, **Error! Reference source not found.** indicates what features are essential, recommended, and optional for different categories of bus stops.

This will be the starting point for the design of new stops or the upgrade of existing stops. It is acknowledged that not all features are realistic in all contexts, both due to local conditions (for example slopes, limited available space) and financial constraints.

Table 9 Essential, recommended and optional features for bus stops outlined in the NZTA One Network Framework.

Feature	Premium	Intermediate	Standard+	Standard	Basic
Kerb height	Essential	Essential	Recommended	Recommended	Optional
Hardstand	Essential	Essential	Essential	Essential	Recommended
Tactile pavers	Essential	Recommended	Recommended	Optional	Optional
Connecting footpath	Essential	Essential	Recommended	Recommended	Optional
Crossing	Essential	Recommended	Recommended	Recommended	Optional
Bus stop sign	Essential	Essential	Essential	Essential	Essential
Bus box	Essential	Essential	Essential	Essential	Essential
Bus stop text	Essential	Recommended	Optional	Optional	Optional
No stopping marking	Essential	Recommended	Recommended	Optional	Optional
Street lighting	Essential	Essential	Recommended	Recommended	Optional
Shelter lighting	Essential	Essential	Recommended	Recommended	Optional
Seating	Essential	Recommended	Recommended	Recommended	Optional
Shelter	Essential	Essential	Recommended	Optional	Optional
Rubbish bin	Essential	Recommended	Optional	Optional	Optional
Recycling bin	Recommended	Optional	Optional	Optional	Optional
Stop-specific timetable	Essential	Essential	Recommended	Recommended	Optional
Public art	Recommended	Optional	Optional	Optional	Optional
Community noticeboard	Recommended	Optional	Optional	Optional	Optional
Ski racks (Queenstown only)	Recommended	Recommended	Recommended	Optional	Optional

Interchanges and central city operations

There are currently three significant public transport interchanges in Otago: the Dunedin Bus Hub, Frankton Bus Hub, and Stanley Street Bus Hub.

Interchanges play a key network function in giving high-quality locations to get on and off buses as well as make connections between services. A strongly performing interchange supports a simple, legible network structure.

As a public transport network grows over time, the design and operation of interchanges may need to be reviewed to determine their suitability:

- Are the interchange locations right for efficient operations?
- Do the interchanges have sufficient capacity (for buses, and for passengers)?
- Are there other options for central-city operations that rely less on single interchanges? (e.g. multiple smaller interchanges, or spreading investment across a wider corridor rather than a single location).

The Frankton Bus Hub is currently being redeveloped by NZTA, while the development of a stronger facility in central Queenstown to replace the current on-street Stanley Street Bus Hub is a key action in the long-term implementation of the Queenstown Public Transport Business Case. We do not yet have a long-term plan for the Dunedin Bus Hub or any facility(s) that would replace it. The policies below outline the considerations that we will apply to decisions around the development of new facilities.

Bus priority infrastructure

Where peak-hour buses face congestion, priority measures such as bus lanes can allow buses to bypass congestion. As well as significantly improving passenger experience with faster trip times, priority measures may have a significant impact on operating costs, as they have the potential to reduce the number of buses required to maintain the peak frequency.

Bus priority measures are not needed in all areas of the network. They are beneficial primarily in locations where peak operating speeds are significantly lower than off-peak speeds, such as in central city locations.

However, these are often locations where there are many competing needs in street design, and less street space to accommodate these needs. It is important that the impact, including financially, of bus priority measures is fully understood.

Bus layover, driver break facilities and opportunity charging

Locations where buses sit still, especially at the end of trips but also mid-trip at interchanges, are strategically important. Buses often sit stationary, either at the last stop of a trip, the first stop of the next trip, or another location that is not a passenger stop. At these locations, there is potential for drivers to take breaks, late-running buses to catch up to their schedule, and battery-electric buses to be charged, this is known as opportunity charging.

These actions all have the potential to increase the reliability of services and reduce the cost of service. Opportunity charging could also allow for an improved bus fleet, as it reduces the weight of batteries needed for a bus to run all day long.

This could allow the bus to carry more weight (such as increasing the maximum number of passengers) or reduce the axle weight (to minimise the damage the vehicle does to the road). It could also reduce the number of buses required, and the amount of charging capacity required at bus depots.

Park and ride facilities

Park and ride facilities allow for travellers to easily switch from a private-vehicle journey to a public transport journey, creating a viable alternative to parking in central areas where there is limited capacity.

5.4.2 Enabling assets

While “network assets” are highly visible to the public, “enabling assets” are the behind-the-scenes infrastructure that make public transport work. Strategic enabling assets consist of assets with long and medium-length lifetimes, such as land, energy supply infrastructure, depot facilities for staff, vehicles and maintenance assets.

Enabling assets have typically been controlled by public transport operators, but ORC is looking to move in the direction of a mixed model where we take a more direct interest in certain assets. This is driven by the need to support a competitive market for service contracts, by reducing barriers to entry.

However, any move towards a mixed model needs to be carefully managed. For the current procurement cycle, we are satisfied that electrification-by-contract is producing good outcomes in Dunedin, where there are two operators and three depots. In Queenstown, however, it is difficult to access strategically valuable land at locations that work for the public transport network, and the network’s size is such that it will operate as a single contract. For this reason, ORC plans to secure land for an electric depot to enable multiple operators to compete for this contract with confidence that they can access a suitable depot.

Infrastructure policies

IN P1	<p>Bus stop categorisation and design: bus stops are categorised on the basis of the NZTA One Network Framework as shown in Error! Reference source not found..</p> <p>The design of bus stop infrastructure should adhere to NZTA Public Transport Design Guidance and New Zealand Crime Prevention Through Environmental Design guidelines, and support high quality end to end journey experience.</p> <p>Investment in bus stop facilities should aim, to the extent practical, to include elements as laid out in Error! Reference source not found..Error! Reference source not found.</p>
IN P2	<p>Accessibility: public transport infrastructure and facilities, as well as supporting infrastructure such as footpaths and crossings, are designed and constructed in a way that aligns with universal design principles to prioritise the accessibility, safety and comfort of all passengers.</p>
IN P3	<p>Bus stop locations: decisions about the locations and spacing of bus stops will consider:</p> <ul style="list-style-type: none"> the service design principles in SD P1 the suitability of the street environment and impact on adjacent land, including the ability to install elements of the features outlined in Error! Reference source not found. efficient spacing, ideally 300-400m in continuous urban environments, that avoids slowing down services and allows for concentration of investment into fewer stops access to locations that are heavily used by people with mobility impairments, such as retirement homes.
IN P4	<p>Central city and interchange operations: central city bus stops, including but not limited to any interchanges will:</p> <ul style="list-style-type: none"> support network legibility and opportunities to connect between services have sufficient capacity for passenger and bus movements, including reasonable increases in frequency be located at a place that does not divert services from efficient and direct routings support a safe, attractive street environment for all users be consistent with the efficient operations of exempt and excluded bus services in the area, and passenger connections between exempt and contracted services be right-sized so as to achieve value for money in construction and operations.
IN P5	<p>Park and ride: the following principles will guide the assessment and development of park and ride facilities:</p> <ul style="list-style-type: none"> Consider the potential of park and ride as an alternative to providing car parking for developments in high demand urban areas Consider the potential to improve other access options, including feeder services, and enhanced walking, cycling and micro-mobility access

	<ul style="list-style-type: none">• Ensure alignment with future land use plans, and flexibility to respond to future land use changes• Locate to serve travel patterns which cannot effectively be served by public transport alone, or active transport connections, due to factors such as urban form and density• Locate to intercept car commuters as early as possible in their journey and ahead of bottlenecks to avoid adding to existing congestion• Locate and design to extend coverage of the public transport network• Locate and design to maximise uptake by people who would otherwise make their whole journey by car.
IN P6	Enabling assets: move towards a mixed model for control or ownership of strategic enabling assets, such as electric bus depots. Decisions to own, or take a level of control over, strategic enabling assets will be based on maintaining a competitive supplier market and achieving value for money in service contracts.

Infrastructure actions

The Council will:

IN A1	Advise, support, and work with our community and road controlling authorities in the design and implementation of bus stops and bus priority measures.
IN A2	Advise, support, and work with our community and partner agencies in the long-term design and implementation of infrastructure that supports central city bus operations, including interchanges.
IN A3	Collaborate with road controlling authorities and bus operators in optimising the locations, facilities, and operations of layover locations, including: <ul style="list-style-type: none">• driver break facilities, including toilets and centralised break facilities• opportunity charging• timetable efficiency• the needs of exempt and excluded services in the area.
IN A4	Support the development of a long-term electric bus depot in Queenstown in order to support electrification and a competitive long-term market for service contracts. This may include the purchase of land and long-term control of the depot.

5.5 Parking management

Parking is critical to support a well-functioning urban environment, and directly influences travel choice. Parking regulation and management therefore plays a key role in managing the complex demands for space on our streets.

When people travel by car, they rely on access to parking at or close to their destination. This means that with ample and free or cheap parking across much of our region, car travel can be

perceived to be more attractive or convenient than public transport. But as our region grows, increased vehicle use has led to increasing demand for road space and parking, congestion, unreliable journey times, and broader liveability issues, especially in Queenstown.

Parking is complex and cannot be solved by simply providing more parking. Rather, we need to work collaboratively across the region to provide practical and alternative ways for people to get around, while ensuring the parking we have is valued, managed efficiently, and prioritised for those who need it most. This includes managing parking in a way that supports public transport, because public transport allows growth in economic activity without growth in congestion. This will be particularly important to allow Queenstown’s economy and employment to grow and not be stifled by road congestion.

One of our key priorities is ensuring parking is managed in a way that:

- provides good access so our buses can move in and out of bus stops safely and easily
- minimises congestion
- disincentivises car travel when other modes are available
- supports and contributes to the reliability and attractiveness of our public transport services.

Parking management policy	
PM P1	Parking management: Parking in Dunedin and Queenstown (including supply and pricing) is managed in a way that supports growth in public transport use.
Parking management actions	
The Council will	
PM A1	Collaborate with partner agencies to ensure parking strategies and fare policies align and support the use of public transport. Collaborate in the development of effective parking management plans to achieve modal shift and emission reduction targets.

6 Focus area 5: Value for money

Objective: Provide public transport services in a manner that achieves good value for money.

Delivering value for money is about providing a public transport system that uses our limited resources to best serve our community. We will continue to do this by delivering efficient, reliable and accessible services that increase patronage (value), whilst balancing the distribution of costs between passengers, central government and ratepayers (money).

Through the GPS 2024-34, the government has set an expectation to reduce the public subsidy of public transport costs. This means we will need to actively investigate and implement initiatives that work towards increasing our private revenue sources over time. Demonstrating value for money will be critical to maintain funding for existing services and accessing future funding to support public transport improvements in our region.

Our overall approach to value for money in this RPTP is to increase our overall revenue stream with a particular focus on growing private revenue. This will involve:

- promoting increased use
- reviewing fare pricing and fare structure
- looking for additional operating efficiencies
- exploring new funding options.

We must however not lose sight of the community and societal benefits of public transport within the value-for-money analysis. People value access, transport choice and the economic, health and environmental benefits that a convenient, reliable and efficient public transport system delivers. We value these outcomes and will continue to balance what people need, what they value and what we can afford to achieve these for our communities.

6.1 Funding

The costs of providing public transport are met through a combination of **public** revenue (central government funding and rates) and **private** revenue (fares and third-party revenue).

Public revenue

Rates: ORC collects rates from Otago ratepayers to help fund public transport. 80% of this revenue comes from targeted rates, applied to areas with immediate access to Orbus public transport services. This recognises the impact that public transport has on the area it serves. The final 20% of rates comes from general rates, paid by all ratepayers in Otago. This recognises the wider economic and environmental value that public transport has for all of Otago.

Rates and funding for public transport are determined through the Long term Plan and Annual Plan processes. This is the opportunity for ratepayers to see the financials and provide feedback on the funding of public transport.

Central government funding: central government funding for public transport infrastructure and services generally comes from the NLTF. Funding is allocated by NZTA through the NLTP and guided by the priorities set out in the GPS.

From time to time, special Crown funding sources are made available for particular purposes. This can supplement NLTF funding or provide support for special projects. One ongoing example of this is the SuperGold Card scheme, which provides free off-peak travel for people over the age of 65.

Private revenue

Fares: passengers pay fares on a trip-by-trip basis. This revenue can be used to reduce the cost to ratepayers and the NLTF or can be invested in improving the service with more trips, or other enhancements.

Fare substitutes: a fare substitution scheme allows a third party, such as an employer or an educational institution, to pay fares on behalf of certain passengers.

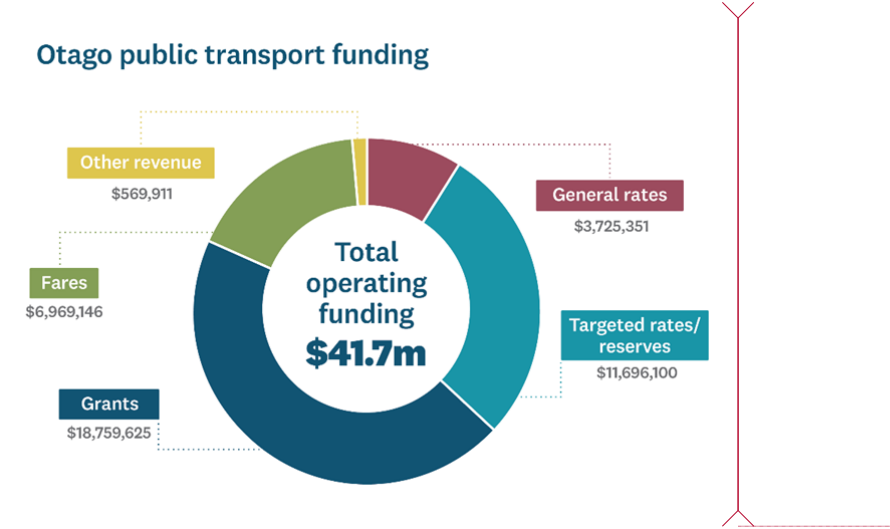
Commercial revenue: advertising on the back of the buses is an example of commercial revenue. Other examples include advertising on bus stops shelters, sponsorship revenue, and commercial retail or rental income. Commercial revenue could play a part in enhancing public transport revenue.

Other funding sources

While not considered private revenue (that contributes to our private share funding targets), other revenue from sources such as developer contributions, parking revenue and congestion charging are examples of revenue that may assist in offsetting public transport operational costs to reduce funding required from ratepayers and taxpayers, or to enhance service levels.

6.1.1 Distribution of costs

The distribution of costs across the funding sources changes over time in response to passenger demand and fares, network service levels and central government priorities. Fares collected from people using our services (and other revenue) generally contributed around one-fifth of the cost of providing public transport services and associated infrastructure in Otago in 2024/25. The remainder of the cost is split roughly equally between local rates and central government funding.



Commented [RH9]: Change Grants Label to 'Central Government'

Figure 13 The distribution of public and private funding for ORC's 2024/25 public transport operation.

Our funding policies centre around increasing overall revenue streams, with a particular focus on growing private share. This will require careful management.

The background and further detail on measuring and increasing private share is outlined in Appendix I.

We are committed to improving public transport in Otago over the next 10 years and beyond. However, the speed and extent to which we can grow our network and services, including catering for growth and connecting our regional centres, will be dependent on funding and our ability to meet any increased operational costs. Decisions will be guided by our ability to

balance financial sustainability (to ratepayers, taxpayers and bus users), transport system efficiency, equity and our emission reduction targets.

Funding policies	
FS P1	Allocation of funding: public transport funding will be allocated in a way that optimises community access, choice, and environmental outcomes, while being financially prudent.
FS P2	Private share: actively work towards increasing the private revenue contribution to the cost of public transport over time.
FS P3	Public transport activities without central government funding: support public transport activities without central government funding only in cases where: <ul style="list-style-type: none">the activity achieves good value for money for ORC, due to being exceptionally valuable or having an alternative funding source that provides a similar level of support to central government fundingthe activity is a trial service, where the success of the trial would create a strong case for future central government funding.
FS P4	Third-party funding: develop and grow third-party funding to increase private share by identifying and implementing feasible initiatives such as: <ul style="list-style-type: none">fareshare – employers and other entities subsidising fares for nominated groupsadvertising – utilising space on vehicles and infrastructure for digital and static advertisingretail opportunitiescorporate sponsorship.
Funding actions	
The Council will	
FS A1	Work with partner agencies to implement network and service improvements that: <ul style="list-style-type: none">align with long term strategiesare at a rate which is affordable for the community and users.
FS A2	Collaborate with our partner agencies to coordinate and align parking strategies, <u>time-of-use charging</u> and other travel demand management tools to improve the value of public transport and achieve wider regional carbon-reduction and mode-shift outcomes.

FS A3	Work with partner agencies and other stakeholders to increase private revenue sources and explore alternative opportunities to fund the public transport network.
FS A4	Develop a public transport revenue plan to consider progressive changes to fares and revenue.
FS A5	Undertake research and regional market analysis to understand the willingness of passengers and potential passengers to pay for public transport.
FS A6	Develop an evidence base to inform viability of potential third-party funding initiatives to assist with setting and achieving private share targets.
FS A7	Regularly review the network to consider opportunities to optimise services and reduce overall operating expenditure.

6.2 Fares

Setting fares is a key decision ORC must make when operating public transport. There are two key considerations in setting our fares:

1. **Base fare level:** what should the basic cost of an adult trip with no discounts be? This is the base fare level, which requires us to balance affordability for the passenger, ORC and other funders. Usually, a higher base fare will mean less patronage, but more revenue.
2. **Fare structure:** how should fare levels vary from this base fare for different trips? This is the fare structure. Fares could be varied for different users (such as a lower fare for young or elderly people), for different times of day, for trip distances, or in a range of other ways. See Attachment 1 for proposed zones for the Dunedin and Queenstown networks.

The base fare level and the fare structure will both have an impact on an **average fare**. In Otago, this will be lower than the base fare level due to concessions.

Fare policy	
F P1	Base fare level: fares for integral services are structured around a base fare level that balances the following considerations: <ul style="list-style-type: none">• Sufficient affordability for users to incentivise regular usage• Maintaining the financial sustainability of services for Council• Competitiveness with the direct costs of driving such as fuel and parking costs.
F P2	Fare structure: from the base fare level, fares for integral services will be structured in a way that balances the following considerations: <ul style="list-style-type: none">• Simplicity of the fare system• Incentivising regular usage

	<ul style="list-style-type: none">Varies between different user and trip types in a way that is equitable and fairAllowing different user and trip types to be served in a way that is financially sustainable for CouncilAligns with NZTA's fares and pricing policy settings and guidance. <p>The structure may include the following elements:</p> <ul style="list-style-type: none"><i>Concessions</i>: transport-disadvantaged people with less ability to pay will be charged lower fares, as outlined in F P3 below.<i>Free transfers</i>: ensuring that people can travel in complex ways without being charged more than they would for a single-vehicle trip.<i>Fare capping</i>: weekly and daily costs are capped to reward regular use.<i>Distance structure</i>: trips operate under a zonal fare system. Our proposed zones are outlined in Attachment 1.<i>Use of cash</i>: eliminate the use of cash payments following the implementation of bank-card payments with NTS. Until this point, cash fares should be higher, and a whole-dollar value to minimise cash handling.<i>Variation between centres</i>: Queenstown, Dunedin, and other parts of Otago have different community aspirations, demands and trip patterns, which may justify some differences in fare policy.<i>Off-peak use incentive</i>												
F P3	<p>Discounted travel for transport-disadvantaged groups: offer the following concessions off the adult base fare:</p> <table><tr><th>Concession</th><th>Concession discount</th></tr><tr><td>Infant (under 5 years)</td><td>100% (free)</td></tr><tr><td>Child (age 5 to 12)</td><td>40100% (free)</td></tr><tr><td>Youth (age 13 to 18)</td><td>40%</td></tr><tr><td>Community Services Card</td><td>50%</td></tr><tr><td>Super Gold Card</td><td>100% (free) in off-peak only</td></tr></table>	Concession	Concession discount	Infant (under 5 years)	100% (free)	Child (age 5 to 12)	40 100% (free)	Youth (age 13 to 18)	40%	Community Services Card	50%	Super Gold Card	100% (free) in off-peak only
Concession	Concession discount												
Infant (under 5 years)	100% (free)												
Child (age 5 to 12)	40 100% (free)												
Youth (age 13 to 18)	40%												
Community Services Card	50%												
Super Gold Card	100% (free) in off-peak only												
F P4	<p>Corporate fare schemes: support the implementation of concessions funded by third parties, such as workplace or student travel schemes.</p>												
F P5	<p>New funded concessions: implement any new, funded concession, if Council considers that:</p> <ul style="list-style-type: none">the concession will not have a significant negative financial or operational impactthe concession does not undermine the effectiveness or integrity of the wider fare structurethe concession aligns with NZTA's fares and pricing policy settings and guidance.												

F P6	<p>Fare reviews: base fare level reviews will be conducted annually, and fare structure (including concessions) reviews at least six yearly to ensure that:</p> <ul style="list-style-type: none">• The base fare level is adjusted in line with inflation• The base fare level and fare structures remain in line with policies F P1, F P2, and F P3 <p>Any decision to increase fares in order to improve financial performance should include consideration of whether there are alternative interventions that could deliver a similar improvement in financial performance.</p>
F P7	<p>Total Mobility: continue to provide funding to enable concession fares for use of the Total Mobility service.</p>
Fare actions	
The Council will:	
F A1	Undertake region-wide fare analysis to give effect to the RPTP fares and funding policies and establish a base fare level that adequately balances affordability to users, and other funders.
F A2	Review base fare levels, annually as a part of Annual Plan and Long Term Plan processes and the fare structure at least every six years.
F A3	Collaborate with our partner agencies to coordinate and align parking strategies and other travel-demand management tools with fare policy to improve the value of public transport and achieve wider regional carbon-reduction and mode shift outcomes.

What about free fares?

One common suggestion is to have free fares for public transport. A free service would be popular and increase patronage. However, we don't think free public transport works for Otago at present for six reasons:

1)

Fare revenue can buy more service: The money we get from fares allows us to run more buses, which increases patronage. Implementing free fares would likely require us to increase rates or reduce our services.

2)

It's fair to the community: When someone rides public transport, the whole community benefits – they are a potential car off the road, reducing congestion, carbon emissions, and more. For this reason, it's reasonable that they do not pay the full cost – it's worth subsidising the service. However, riding public transport is not an act of charity: people choose to ride the bus because it is useful to them. It's reasonable to ask them to pay a fair share of the cost.

3)

We believe in our service: We think public transport should be good enough to be worth paying for.

4)

We don't want success to be a problem: When public transport is free or excessively cheap, usage becomes a problem. When buses get too full, it is hard to increase capacity. In the long term, it will put us in a position where the success of public transport is a problem rather than good news.

5)

Data collection: Free travel would negate the need for passengers to use a card and tag on and off our services. This reduces our ability to understand our community's travel patterns therefore limiting our capacity to plan services effectively.

6)

Government policy: Not only would free/ultracheap fares cost us money directly, they would also put our central government funding share at risk. The government has made it clear that a reasonable share of the cost of public transport needs to be recovered from users and third parties.

6.3 Procurement approach

ORC delivers public transport services through service contracts. This means that, although we take responsibility for planning and designing public transport, our services are delivered under contract by private specialist public transport operators.

The details of how we design, award, and manage these contracts are outlined in a separate document, our Transport Activities Procurement Strategy 2024-2027. For procurement we group our services into contractual units. A contractual unit contains a group of services that serve a particular geographic area. This may be a single service, but more often is a grouping of services that it makes sense (strategically and operationally) to award as a single contract.

The way we procure our service contracts and other activities such as ticketing, passenger information and support, play a key role in ensuring our we achieve value and efficiency from our transport investment.

Procurement policies	
PA P1	Allocation of services into units: integral services will be grouped into contractual units based on: <ul style="list-style-type: none">effectively meeting network outcomesoperational efficiency of servicessupporting a competitive and efficient market.
PA P2	Procurement: public transport contractual units will be procured in accordance with the NZTA Procurement Manual and ORC's Transport Activities Procurement Strategy, with a focus on achieving value for money through: <ul style="list-style-type: none">competitively tendered partnering contracts as the primary method of supplier selectiondirectly negotiated contracts in instances where this supports a competitive market in the long term.
PA P3	Collaboration: maintain an open and collaborative approach to network planning, development, procurement and service delivery with our operators.
Procurement actions	
The Council will:	
PA A1	Transition to the new unit structure outlined in Appendix G through a combination of competitive tenders, directly negotiated contracts, and/or variations to existing contracts.
PA A2	Design service contracts and undertake procurement in a manner that: <ul style="list-style-type: none">is open and transparentcreates opportunities for market entry by new and capable suppliersprovides adequate lead times to allow operators sufficient time to secure necessary resourcesprovides service continuity to passengerswhere possible, supports the continuing operation of multiple suppliers across Otago, and within the Dunedin networkappropriately allocates roles, responsibilities and risk between ORC and operators within the contract frameworkincludes fair and open mechanisms for contracts to be varied to implement service changes within the life of contractsconsiders the whole-of-network impact of procurement processes, beyond the routes being immediately procuredaligns future contract expiry dates so that related units can be contracted in a single process.

PA A3	Engage with our territorial authorities about ORC public transport procurement processes within their jurisdictions. Take a proactive approach to align infrastructure planning with opportunities to improve routes and service levels as part of the contracting process.
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6.4 Workforce sustainability

The sustainability of the public transport workforce has been a central issue in recent years. Bus drivers have a demanding job, and represent the public face of our service. It is crucial that we have a workforce with experience, skill, and the enthusiasm to deliver a service that is both safe, and delivers a positive experience to users. To achieve this, we need to attract and hold onto great drivers.

Through the intervention of ORC, and with the support of operators and central government, Otago's bus contracts now include a base wage requirement that is significantly above the Living Wage. It also increases year-by-year in line with the labour market. While fairly compensating our services' workforce, there is still work to do. ORC will continue to work with operators and our partner agencies to make sure driving buses is attractive and safe. This includes designing reasonable shift lengths, break facilities and driver safety strategies.

Workforce sustainability policies	
WS P1	Fair and equitable: ORC will plan, procure and deliver public transport services in a way that ensures employment and engagement of the public transport workforce is fair and equitable, thus providing a sustainable labour market and sustainable provision of public transport services.
WS P2	Wages: public transport contracts will continue to include a base wage requirement which ensures that at least the current wage levels of bus drivers are maintained, with annual adjustments based on labour cost indices.
Workforce sustainability actions	
The Council will:	
WS A1	Collaborate with operators and partner agencies to: <ul style="list-style-type: none">enhance driver access to quality essential facilities such as toilets at at key network locations such as interchanges, and the termini of bus routes.design services and timetables in a way that enables drivers to have access to essential facilities while on break, and to meet Employment Relations Act break requirements in an efficient way.

Part 3

7 Implementation and monitoring

This chapter outlines how Otago's public transport services will be monitored and reviewed. It also includes guidance on when the RPTP will be reviewed and the process for making changes to it, including when changes are considered significant.

7.1 Performance monitoring and evaluation

We manage, monitor, and evaluate the performance of our public transport services and network for the following reasons:

- To ensure services contribute to wider community outcomes
 - For patronage-oriented services we aim to induce mode shift, alleviate congestion, reduce emissions, and enable productive urban land use
 - For coverage-oriented services we aim to provide choice, improve inclusive access and meet the needs of transport disadvantaged people
- To improve end-to-end journey experience for passengers and encourage more people to use public transport
- To enable continuous improvements to the efficiency, effectiveness and value for money from public investment in public transport services and infrastructure.

We monitor our performance at two levels: the **service** level and the **network** level. We will ensure that all units comply with unit and network monitoring requirements of NZTA as technology allows.

7.1.1 Service performance

We monitor and evaluate performance of each public transport service unit. The outcomes of these service-level evaluations inform the following processes:

- **Operational management:** identifying operating trends and opportunities for improvement on an agile, day-to-day basis .
- **Contract management:** to ensure that services are being operated in the way we require of our operators, and in order to collaborate to find new solutions.
- **Continuous improvement:** to enable continuous improvement to passenger end-to-end journey experience, network efficiency, and value for money from public investment in public transport.

As part of ORC's monitoring process, we undertake regular comprehensive reviews of each contracted service unit. Our unit contracts include specific performance targets relevant to each unit to ensure that the services meet the overall objectives of this RPTP.

Service-level performance measures include patronage, reliability, punctuality, customer satisfaction, fare revenue, cost per kilometre, and cost per passenger boarding for each route and service unit.

7.1.2 Network performance

The performance of the overall public transport system, or network is also monitored and evaluated. The outcomes of these network-level evaluations inform the following processes:

- **Regular reporting:** monthly, quarterly, and annual reporting to Council and its committees and NZTA

- **Planning:** analysing data for the purpose of long-term planning and identifying future improvements, including identifying investments that represent good value for money through business case processes; ensuring our higher-performing services offset lower-performing ones to enable well-functioning integrated networks.
- **Data sharing:** ensuring we have easy access to reliable data that we can share with partner agencies to support their own operational management, reporting, and planning; and with the public subject to the requirements of the Local Government Official Information and Meetings Act 1987, and the restrictions of the Privacy Act 2020.

Network-wide measures include patronage, passenger satisfaction, reliability, punctuality, coverage levels, mode shift, and emission levels.

7.1.3 Monitoring and evaluation methods and measures

We monitor and evaluate our performance from various sources including:

- our ticketing system
- real-time information
- customer feedback
- annual customer satisfaction survey
- information provided by operators.

On an individual basis, service performance is expected to vary significantly depending on the type of service provided. This means we have lower performance expectations for low-frequency connector services than for frequent services. On a network wide basis, the council expects to trend in the direction as outlined in **Error! Reference source not found.** relative to each performance measure.

Table 10 Performance measures for this RTP.

KPI	Success measure	Target or approach
Service utilisation	Patronage <i>Annual public transport boardings in Whakatipu</i> <i>Annual public transport boardings in Dunedin</i>	Increase annually
	Mode share⁹ <i>Percentage of trips taken using public transport</i>	Increase
Passenger experience	On-time performance <i>Percentage of Whakatipu-operated services departing first stop between 1 minute early and 5 minutes late</i> <i>Percentage of Dunedin-operated services departing first stop between 1 minute early and 5 minutes late</i>	Greater than 90%
	Service delivery <i>Percentage of Whakatipu scheduled services delivered</i>	Greater than 99%

⁹ Mode share figures are derived from the New Zealand 5-yearly census and Household Travel Survey.

	<i>Percentage of Dunedin scheduled services delivered</i>	
	Passenger satisfaction <i>Overall passenger satisfaction with Whakatipu public transport system in annual survey.</i> <i>Overall passenger satisfaction with Dunedin public transport system in annual survey.</i>	Maintain or increase three-year rolling average at greater than 90%
Total Mobility	Passenger satisfaction <i>Overall passenger satisfaction with Total Mobility at annual survey.</i>	Maintain or increase three-year rolling average at greater than 90%

7.2 Making changes to this RPTP: Our significance policy

This RPTP can be varied at any time. Any variation must be assessed for its significance in accordance with Section 126 of the LTMA 2003. The degree of significance of a variation determines the level of consultation required.

This section sets out our policy on how ORC will determine if a variation is deemed 'significant' as required in the LTMA.

ORC will also follow internal significance policy (He Mahi Rau Rika: ORC Significance, Engagement and Māori Participation Policy) when assessing the degree of significance and deciding on appropriate engagement and consultation processes.

For variations that are deemed to be significant, the LTMA requires ORC to follow the consultation requirements outlined in Section 125 of the LTMA.

7.2.1 Assessing significance

The significance of any proposed variation will be determined on a case-by-case basis. When assessing the significance of a proposed variation, ORC will consider:

- **Strategic alignment:** the extent to which the variation departs from the vision and objectives of this RPTP or ORC's Strategic Directions, or affects Otago's RLTP, or any of the region's local authority long-term plans.
- **Community views:** the extent to which the community's views on the matter are already known through previous ORC public consultation. If the community has already shown a clear preference for a particular option, then the decision to proceed with this option is less significant than a decision to proceed with an option that is clearly not favoured by the community, or when the community's views are unknown.
- **Area of impact:** the extent to which the variation will have an impact across the region, or a more localised impact. Where the impact is expected to be local in nature, a targeted consultation process may be undertaken.
- **Safety and accessibility:** the extent to which the variation will impact on the council's ability to ensure the safety and accessibility of the public transport system for passengers, workers and the general public.
- **Network operations:** the extent to which the variation will impact on the overall level, quality and performance of public transport services in the region.
- **Compatibility with good land use practice:** the extent to which the variation will assist or adversely impact on the council's ability to achieve good land use outcomes that support effective delivery of services.
- **Practicality:** ORC aims to make policy decisions on behalf of its communities in a well-informed, efficient and effective manner. This will not be achieved if the decision-making process is either unreasonably costly or unreasonably slow. The council will take into consideration the urgency and magnitude of proposed change in association with its decision-making.
- **Cost:** the magnitude of the proposed change in terms of financial cost to the region.
- **Precautionary principle:** where the significance of a matter being considered or a decision being made is unclear or the matter is controversial, then ORC will take a cautious approach, treating the issue as of more, rather than less, significance.

7.2.2 Significant variations

Matters that are always considered significant include:

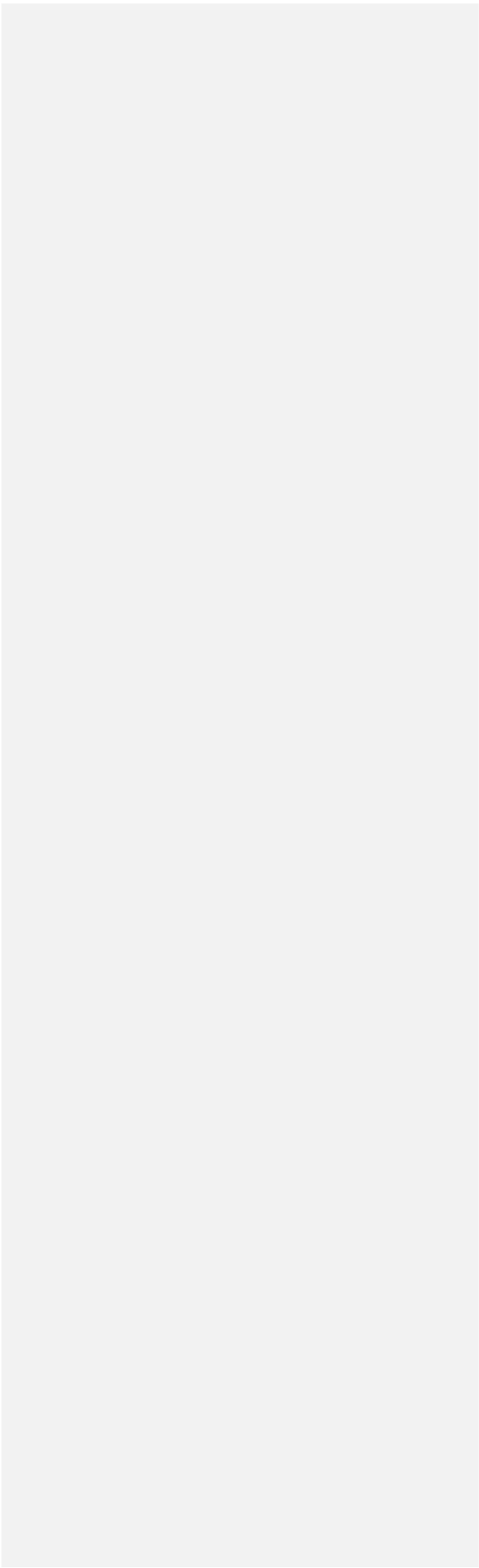
- any change to this significance policy
- any change with a more than minor impact on ORC's ability to:
 - achieve the Long-term Plan's strategic directions regarding transport; and,
 - achieve the objectives of the RPTP or the RLTP
- significant changes to the network, including major reorganisation of units
- significant changes in funding requirements that triggers ORC's Long-term Plan significance policy.

7.2.3 Non-significant variations

The following matters are considered 'not significant' and do not require full public consultation. ORC will determine what the appropriate level of consultation is (for example targeted community consultation) based on the nature of the change and our obligations under the Local Government Act.

- Minor editorial changes or updates to this RPTP
- Fare level and structure changes
- The addition, removal or amendment of any matter that has already been the subject of public consultation or otherwise consulted on in accordance with Section 125 of the LTMA
- The addition, removal, or amendment of policies or objectives required to maintain consistency with any other plan, policy or directive of Regional Council or central government
- The addition, removal or amendment of individual units, including trial units, consistent with the RLTP
- Minor changes to service descriptions after a service review, for example changes to the frequency and hours of a service that result in the same, or better level of service
- Changes to the descriptions of services or service groupings following a service review, provided there is no significant increase in cost.

8 Attachments



8.1 Attachment 1: Proposed Fare Zones for revised fare structure

A zone fare structure is one where passengers travelling further distances (i.e. across multiple zones) will pay a higher fare than people travelling shorter distances (i.e. within one zone). Zone fare structures are commonly used throughout New Zealand, including in Auckland, Hamilton and Wellington. ORC is considering adopting a zone fare structure for the urban bus networks in Dunedin and Queenstown. This attachment contains the proposed zone boundaries.

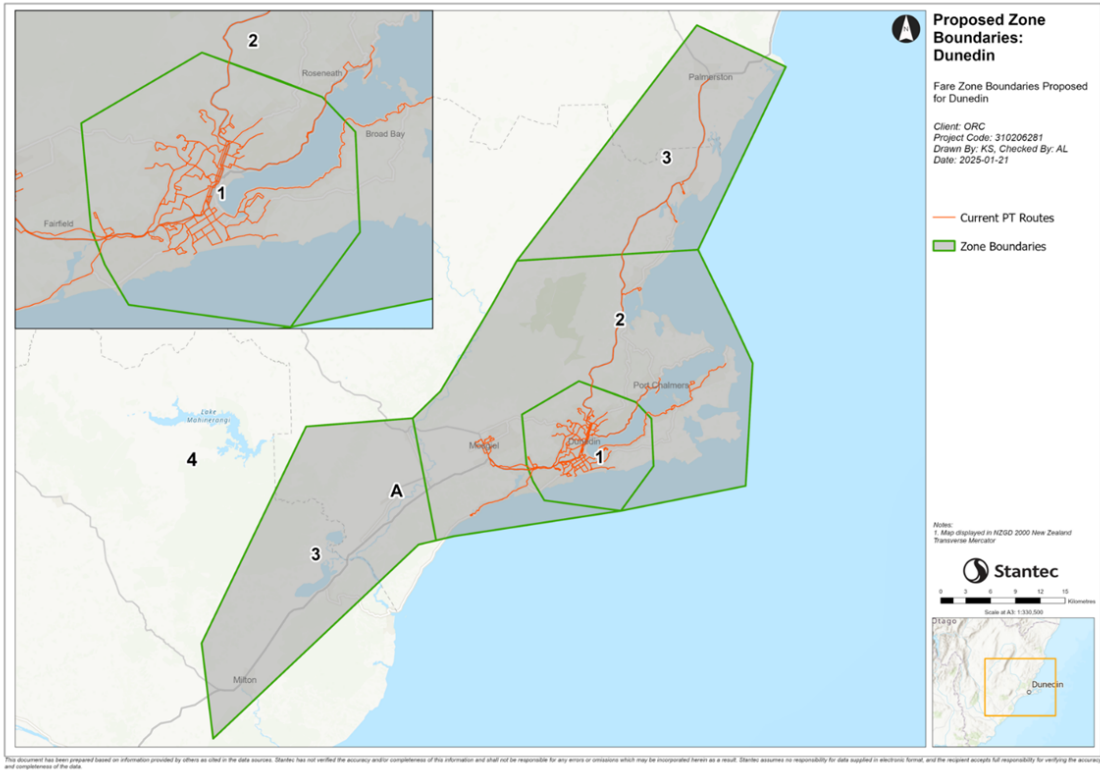


Figure 14 The proposed zone boundaries for the Dunedin bus network (2025).

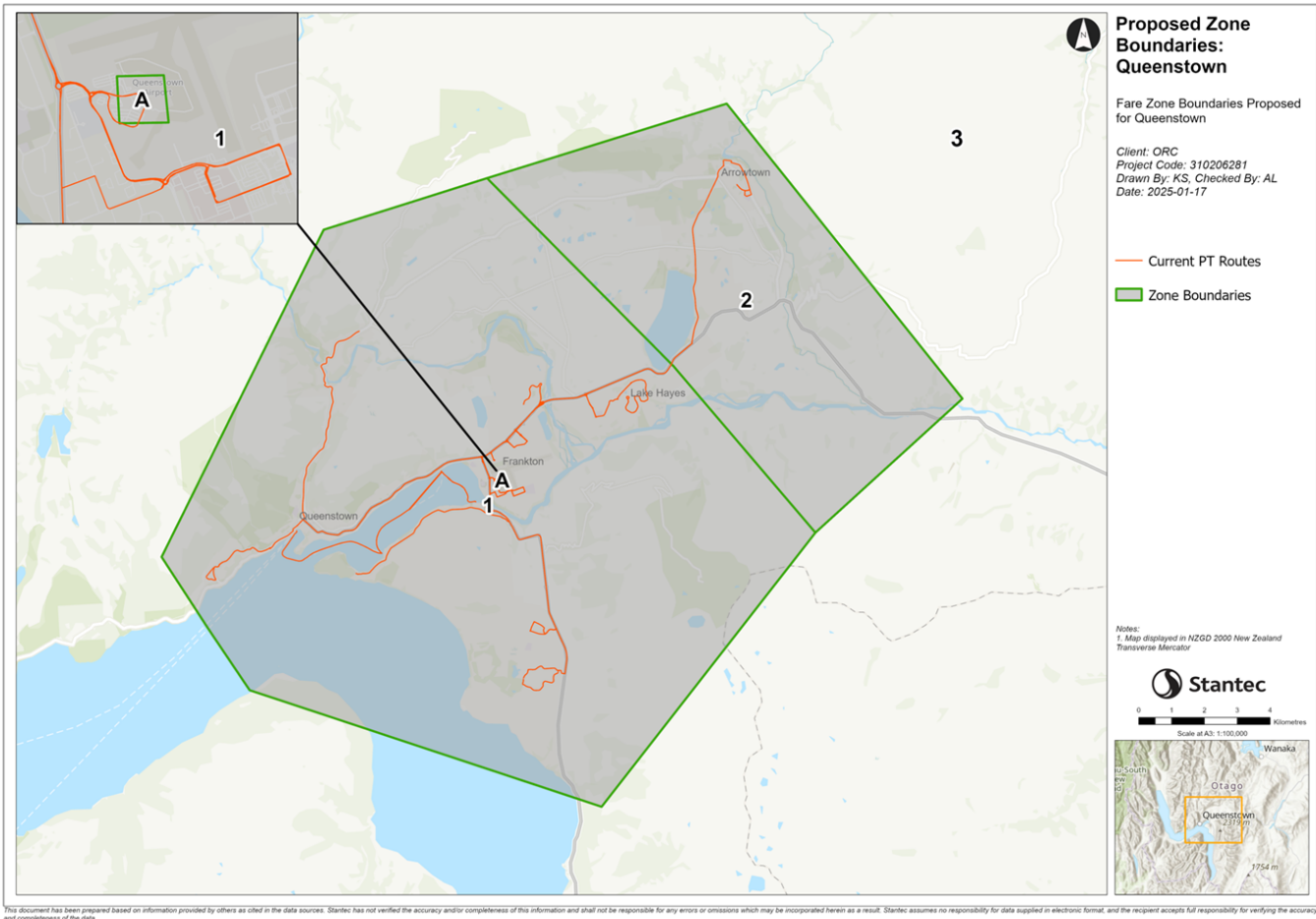


Figure 15 The proposed zone boundaries for the Queenstown bus network (2025).

9 Appendices

9.1 Appendix A: LMTA principles in this RPTP

Section 115(1) of the LTMA notes that public transport in New Zealand must be guided by five principles. This appendix highlights how this RPTP gives effect to each of these principles.

Public transport principle (LTMA Section 115(1))	Sections of this RPTP giving effect to the principle
(a) Well-used public transport services reduce the environmental and health impacts of land transport, including by reducing reliance on single-occupant vehicles and using zero-emission technology.	4.1: Integrating land use planning with public transport 4.2: Decarbonising our bus fleet and related infrastructure 5.1: How we design our network and services 5.3: Multi-modal access 5.5: Parking management
(b) Public transport services support a mode shift from private motor vehicle use and equitable access to places, facilities, services, and social and economic opportunities if they are coordinated, integrated, reliable, frequent, accessible, affordable, and safe.	2.1: Public information 2.2: Safety 2.3: Customer service 2.4: Ticketing system 2.6: Special events 2.7: Service and vehicle standards 2.8: Improving accessibility for transport disadvantaged people 3.1: Our equity-focused approach 3.2: Our engagement process 5.1: How we design our network and services 5.3: Multi-modal access 6.2: Fares
(c) Fair and equitable employment or engagement of people in the public transport workforce should ensure that there is a sufficiently robust labour market to sustain and expand public transport services.	3.3: Collaborative working relationships 6.4: Workforce sustainability
(d) Regional councils, territorial authorities, and public transport operators should work together to co-ordinate public transport services, the provision of infrastructure, and land use as necessary to meet the	2.6: Special events 2.7: Service and vehicle standards 3.3: Collaborative working relationships

needs of passengers and to encourage more people to use the services.	4.1: Integrating land use with public transport 4.2: Decarbonising our bus fleet and related infrastructure 5.3: Multi-modal access 5.4: Infrastructure 5.5: Parking management 7.1: Performance monitoring and evaluation
(e) Public transport services should be provided in a way that assists public transport investment to be efficient and give value for money.	6.1: Funding 6.2: Fares 6.3: Procurement approach

9.2 Appendix B: Strategic Directions (2024-2034) and goals

Strategic Directions (2024-2034) is ORC’s leading strategic document designed to steer work programmes towards achieving the vision of a healthy and connected environment and communities ki uta ki tai (from the mountains to the sea). It is structured around six core themes: partnerships, communities, environment, resilience, climate and transport. Each theme is driven by an aspiration and three goals.

Strategic Directions outlines a vision for public transport in Otago and has guided our thinking in developing this RPTP. **Error! Reference source not found.** illustrates the relationship between the core themes of the Strategic Directions and the focus areas guiding this RPTP.

Table 11 An overview of how the focus areas of this RPTP relate to the six core themes of Strategic Directions (2024-2034)—partnerships, communities, environment, resilience, climate and transport.

Partnerships
<p>How this RPTP relates to Partnerships:</p> <p>Focus area 2 (Build trust) establishes our approach to build meaningful relationships with mana whenua, partner agencies, key stakeholders and community groups to ensure public transport outcomes are aligned with their aspirations, needs and interests.</p>
Communities.
<p>How this RPTP relates to Communities:</p> <p>Focus area 2 (Build trust) demonstrates our commitment to having open and meaningful dialogue with communities so they can be active participants in public transport decision-making.</p>
Environment
<p>How this RPTP relates to Environment:</p> <p>Focus area 3 (Environmental sustainability) affirms our strategy to contribute to a healthy environment ki uta ki tai (from mountains to the sea) through decarbonisation and integrating public transport with land use.</p>
Resilience
<p>How this RPTP relates to Resilience:</p> <p>Focus area 3 (Environmental sustainability) outlines policies and actions that promote public transport in well-functioning urban environments that are sustainable and resilient in alignment with the Regional Policy Statement.</p>
Climate
<p>How this RPTP relates to Climate:</p> <p>Focus area 2 (Build trust) highlights our approach to working collaboratively with our partner agencies and other stakeholders to address the diverse factors impacting climate. This includes public transport, land use</p>

development and infrastructure. Collectively we will work together to increase public transport patronage and reduce people's dependence on private cars, ultimately lowering emissions. Focus area 3 (Environmental sustainability) elevates the climate emergency as a core consideration of public transport decision-making.
Transport
<u>How this RPTP relates to Transport:</u> Focus area 1 (Passenger experience) outlines our intentions to foster a public transport system that respects passengers and supports community wellbeing aspirations. Focus area 3 (Environmental sustainability) demonstrates our commitment to the development of well-functioning urban environments that reduce carbon emissions and congestion, improve air quality and promote public and active transport as the preferred modes of travel. Focus area 4 (A connected and integrated network) highlights our goals to improve connectivity throughout the region. Focus area 5 (Value for money) discusses our intention to provide useful public transport in a way that is affordable for passengers and that is affordable for passengers, central government and ORC.

9.3 Appendix C: Strategic context

This RPTP considers, aligns and gives effect to a range of local, regional and national strategies, plans and policies outlined in **Error! Reference source not found..** Below is a comprehensive list of all the strategic documents taken into account in this RPTP's development:

National plans and strategies

- NZTA Arataki (30-year Plan)
- Ministry of Transport Outcomes Framework
- Government Policy Statement on land transport
- National Land Transport Programme
- National Land Transport Fund
- National Policy Statement on Urban Development
- National Energy Efficiency and Conservation Strategy (expired in 2022)
- New Zealand Emissions Reduction Plan
- New Zealand Disability Strategy

NZTA public transport frameworks

- Sustainable Public Transport Framework
- One Network Framework
- NZTA guidelines:
 - Development guidelines for regional public transport plans
 - Requirements for Urban Buses
 - Public Transport Design Guidance
- NZTA Procurement Manual

Regional plans and strategies

- Otago Southland Regional Land Transport Plans
- Otago Regional Policy Statement
- ORC Long-Term Plan
- ORC Climate Strategy
- ORC Transport Procurement Strategy
- ORC Strategic Directions

Sub-regional plans and strategies

- Clutha District Council
 - District Plan
 - Long-Term Plan
 - Climate Change Strategy
 - Destination Strategy
 - Living and Working in Clutha Strategy
 - Transport Activity Management Plan
- Central Otago District Council
 - District Plan
 - Long-Term Plan
 - Destination Management Plan
 - Transportation Activity Management Plan
 - Cromwell 'Eye to the Future' Masterplan
 - Teviot Valley Spatial Plan
 - Vincent Spatial Plan
- Dunedin City Council
 - Future Development Strategy
 - District Plan

- Long-Term Plan
 - Disability Strategy
 - Integrated Transport Strategy
 - Interim Speed Management Plan
 - Destination Management Plan
 - Dunedin's Social Wellbeing Strategy
 - Te Ao Tūroa - Dunedin's Environment Strategy
 - Zero Carbon Plan 2030
- Queenstown Lakes District Council
 - Grow Well | Whaiora – Spatial Plan
 - District Plan
 - Long-Term Plan
 - Economic Development Strategy
 - Land Transport Asset Management Plan
 - Kirikiri/Frankton Masterplan
 - Frankton to Queenstown - Queenstown Town Centre Masterplan
 - Ladies Mile Masterplan
- Waitaki District Council
 - District Plan
 - Long-Term Plan
 - Uplifting Waitaki: Hāpaitia te Waitaki Economic Development Strategy
 - Interim Speed Management Plan
 - Ōamaru, Weston and Kakanui Spatial Plan
 - Central Ōamaru Masterplan

9.4 Appendix D: Our engagement process for this RPTP

Our engagement process for this RPTP followed internal guidelines outlined in ORC's Engagement Approach: A Guide to Connecting with Community (2024). This process meets the consultation requirements in the Land Transport Management Act 2003 (Sections 124 and 125) and follows the principles of consultation detailed in the Local Government Act 2002 (Section 82). Our engagement with mana whenua followed He Mahi Rau Rika: Otago Regional Council Significance, Engagement and Māori Participation Policy in recognition of our partnership approach.

Our engagement process involved a combination of surveys, focus groups and meetings with our mana whenua partners, partner agencies (NZTA, territorial authorities and public transport operators), workforce, and community groups with an interest in public transport. The thoughts and perspectives of these parties influenced the content and direction of the RPTP and were collated into a 'What We Heard' report (below). This report was shared with these parties to communicate how their input contributed to our decision making.

Following NZTA's Development Guidelines for Regional Public Transport Plans (2024), our engagement process employed a relational approach to engagement focusing on communication as a process to create shared understandings. Our intention was that this approach will enable ORC to embrace a long-term approach to public transport delivery where we collaborate closely and share information with our mana whenua partners, partner agencies and community groups.

What we heard: Engagement insights for the Otago Regional Public Transport Plan (2025-2035)

Background

- Otago Regional Council (ORC) is currently revising the Regional Public Transport Plan (2025-2035). This Plan will guide the priorities and investments in public transport in Otago over the next ten years.
- From October 2024 to January 2025, ORC conducted meetings, focus groups and surveys with people representing government agencies and ministries, community advocacy groups, tourism groups, Mana Whenua and educational institutions across Otago. Our intention was to listen and understand their perspectives on public transport and incorporate them into the Plan. In total, we reached out to 124 stakeholders and successfully engaged with 52 of them.
- We co-designed the Plan with Dunedin City Council, Queenstown Lakes District Council, Clutha District Council, Central Otago District Council, Waitaki District Council and the New Zealand Transport Agency Waka Kotahi to ensure it represents Otago's diverse transport needs.
- This report summarises 'What We Heard' from those conversations. It is intended to inform key stakeholders about how their input influenced ORC's decision-making while developing the Plan.

The stories we heard

Key stakeholders shared their insights on many aspects of public transport. These insights can be summarised into four main stories:

The rural story

People living in Otago's rural communities have few public transport options and are forced to rely on private vehicles to get around. This situation poses challenges for people who are unable to drive, as they have limited access to opportunities. Key issues that people raised include:

- Enhancing regional connectivity by improving public transport between rural communities and urban services (e.g. Dunedin hospital and airport)
- Exploring 'community transport' (e.g. Community Vehicle Trusts) as a potential solution to enhance connectivity between rural communities and urban centres

The Queenstown story

The Queenstown area and surrounding communities have experienced rapid growth and development over the past few years and is expected to continue in the foreseeable future. This growth has increased private car usage which has led to traffic congestion. Key issues that people raised include:

- Working collaboratively with key stakeholders in land-use and transport planning to create options for people to ride bikes, walk and take public transport, so there are many different, easy ways for people to get around
- Exploring the potential for new transport modes, including expanding ferry access or ropeway services
- Investigating ways to improve transport for tourists throughout the Queenstown Lakes District and neighbouring areas

The passenger story

Passengers need to feel safe, valued and respected when taking public transport. Key issues that people raised include:

- Breaking down barriers to using public transport through promotion and community outreach
- Improving the quality and quantity of bus shelters and seats
- Improving wayfinding tools that provide accurate and real-time information to passengers (e.g. Transit app and electronic signage)
- Enhancing the reliability and frequency of our bus networks and Total Mobility services, including extending operating hours
- Ensuring public transport is a comfortable experience for people with accessibility issues, including by increasing driver training
- Maintaining fares that are affordable for passengers

The relationship story

Improving public transport requires ORC to build relationships and work collaboratively with communities, public transport operators, territorial authorities and other relevant stakeholders. Key issues that people raised include:

- Building trust with key stakeholders through open and honest dialogue
- Integrating decision-making and aligning work programmes with key stakeholders to ensure the public transport network meet's everyone's needs

Our next steps

These stories will play a crucial role in shaping the policies and actions that form the foundation of the ORC Regional Public Transport Plan (2025-2035). While we cannot guarantee their immediate implementation, these insights will be carefully considered and prioritised where possible in our work programmes. Moving forward, we invite you to provide feedback through the public submission process, which is currently scheduled for March 2025.


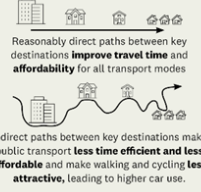
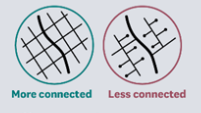

9.5 Appendix E: Urban form factors

This appendix should be read alongside Section **Error! Reference source not found.**, which outlines ORC’s approach to integrating land use planning with public transport. This approach aligns with ORC and central government policies and strategies directing changes to urban environments that increase accessibility to public transport, including:

- the New Zealand Urban Design Protocol (2005) National Policy Statement on Urban Development (2020)
- Urban Growth Agenda
- Otago Regional Policy Statement (2019)
- Joint DCC/ORC Future Development Strategies for Dunedin
- Queenstown Lakes Spatial Plan (2021).

Error! Reference source not found.highlights four urban form factors that influence the viability of providing useful and frequent public transport in Otago: proximity, linearity, connectivity and density. Where a new development area does not align with one or more urban form factors, it should be assumed that public transport provision sufficient to enable a well-functioning urban environment cannot be publicly provided. The assessment criteria can be used to inform planning for new development areas and assess the potential viability of useful and frequent public transport service provision. The table is not intended to be a definitive list of all factors that require consideration.

Table 12 Four urban form factors that influence the viability of providing useful and frequent public transport in Otago.

	Urban form factor	Macro-urban implications			Public transport implications	Assessment criteria for considering the viability of useful and frequent public transport services		
Proximity What is the distance between key destinations?	 <p>Shorter distances between key destinations enable well-functioning urban areas</p> <p>Longer distances between key destinations reduce affordability for all transport modes</p>	Proximity	Shorter distances	Longer distances	<p>Doubling the travel distance roughly doubles the resources (labour and energy) and funding required to deliver a public transport service.</p> <p>Minimising travel distances enhances the viability of frequent service provision. Delivering high-frequency services over long distances is not considered viable.</p>	<p>Is the development area in very close proximity to the existing built urban area?</p>		
		Vehicle kilometres travelled	Lower	Higher				
		Energy demand	Lower	Higher				
		GHG emissions	Lower	Higher				
		Consumption of land	Lower	Higher				
		Impact on nature	Lower	Higher				
		Cost of infrastructure	Lower	Higher				
		Cost of transport	Lower	Higher				
		Active transport viability	Higher	Lower				
		Access to opportunities	Higher	Lower				
Linearity Are key destinations located 'on the way' to one another?	 <p>Reasonably direct paths between key destinations improve travel time and affordability for all transport modes</p> <p>Indirect paths between key destinations make public transport less time efficient and less affordable and make walking and cycling less attractive, leading to higher car use.</p>	Linearity	More linear	Less linear	<p>New development areas that require a frequent service to deviate from a linear alignment make the service more expensive to provide and increase travel times for people not wanting to access that specific area. In this scenario, the service is likely to cost more and have less patronage and is not considered viable.</p>	<p>Is the new development area situated 'on the way' to other existing key destinations through a direct route alignment? Or:</p> <p>Can the area be serviced with a short linear extension to an existing or planned public transport line? Or:</p> <p>Does the new development area justify the creation of a new frequent line that connects to other key destinations in a way that aligns with the assessment criteria in this table?</p>		
		Vehicle kilometres travelled	Lower	Higher				
		Energy demand	Depends on the specific development and context					
		GHG emissions						
		Consumption of land						
		Impact on nature						
		Cost of infrastructure						
		Cost of transport	Lower	Higher				
		Active transport viability	Higher	Lower				
		Access to opportunities	Higher	Lower				
Connectivity Are local street networks easily connected?	 <p>More connected Less connected</p> <p>More connected street networks promote active transport use and offer greater access to public transport stops and hubs than less connected street networks.</p>	Connectivity	More connected	Less connected	<p>The local street network design determines whether it is possible to deliver public transport services that operate efficiently and where people can access the service easily and safely.</p> <p>Connected street patterns for active transport will enable many people to be within a short distance of public transport hubs compared with a disconnected street pattern.</p> <p>Delivering high-frequency services to/within an area with a disconnected street pattern is not viable.</p>	<p>Will the development area have a highly connected and safe active transport network?</p> <p>Will the street layout and design enable the efficient movement of public transport vehicles?</p> <p>Will on-street public transport infrastructure enable the safe and efficient boarding and alighting of people of all abilities during all weather conditions?</p>		
		Vehicle kilometres travelled	Lower	Higher				
		Energy demand	Depends on the specific development and context					
		GHG emissions						
		Consumption of land						
		Impact on nature						
		Cost of infrastructure						
		Cost of transport	Lower	Higher				
		Active transport viability	Higher	Lower				
		Access to opportunities	Higher	Lower				
Density Are diverse key destinations densely or sparsely located?	 <p>Higher density Lower density</p> <p>Higher-density development leads to higher patronage and more cost-efficient public transport services compared with lower-density development.</p>	Density	Higher density	Lower density	<p>Doubling the density of an area will roughly double the patronage on a public transport service.</p> <p>Higher density with diverse key destinations (e.g. housing options at multiple price points, supermarkets, cafes and parks) promotes more public transport use, as each additional person is more likely to use public transport because of other factors associated with higher density, such as parking scarcity, more congestion and better active transport links.</p> <p>Frequent services require higher densities to warrant investment in service provision.</p>	<p>Is the development area characterised by a higher density with diverse key destinations that warrants frequent service provision?</p>		
		Vehicle kilometres travelled	Lower	Higher				
		Energy demand	Lower	Higher				
		GHG emissions	Lower	Higher				
		Consumption of land	Lower	Higher				
		Impact on nature	Lower	Higher				
		Cost of infrastructure	Lower	Higher				
		Cost of transport	Lower	Higher				
		Active transport viability	Higher	Lower				
		Access to opportunities	Higher	Lower				

9.6 Appendix F: Transit-oriented development principles

ORC aims to bring useful and frequent public transport services to high density, mixed-use transport hubs that follow transit-oriented development principles. This approach offers numerous benefits, including reduced trip distances, improved journey times and reliability, increased productivity and lower greenhouse gas emissions. Transit-oriented development is supported by the Ministry of Transport and aligns with the National Policy Statement on Urban Development 2020 to promote well-functioning urban environments.

Effective transit-oriented development considers seven key factors: design, distance to public transport, density, diversity, destination accessibility, demand management and demographics. **Error! Reference source not found.** outlines ORC’s criteria for assessing the provision of useful and frequent public transport services in existing and proposed transit-oriented development areas.



Table 13 Principles of transit-oriented development and the assessment criteria for ORC to provide useful and frequent public transport to proposed transit-oriented development areas.

Principle	Assessment criteria for providing useful and frequent public transport services to proposed transit-oriented development areas
Design – prioritise walking and cycling through effective street and infrastructure designs to reduce reliance on car use.	Is the development area designed in a way that is conducive for safe public and active transport as the primary mode of transport? Examples include safe accessibility to transport hubs (e.g. foot and cycle paths, streetlights) and amenities (e.g. benches, parks landscaping).
Distance to public transport – locate transport hubs as a focal point in urban areas.	Is the development area easily accessible and located near a transport hub?
Density – optimise residential and commercial densities with higher density within a specific walking distance threshold and less dense on the periphery to reduce distance of travel.	Is the development area dense enough to support public and active transport services within a 15-minute walk of residential and commercial opportunities, and a 30-minute walk in less dense areas on the periphery of urban areas?
Diversity – create complementary mix of land uses and activities within higher density zones to make urban centres a safe and attractive destination to live, work and play.	Does the development area support mixed land uses within a higher density sufficient to make it a safe and attractive area to live, work and play? Examples of diversity include a range of housing options, employment and educational opportunities, shops and services and community facilities.
Destination accessibility – make public transport options highly accessible, well connected and integrated with surrounding environment to support inclusive access for all ages and abilities.	Is the development area accessible, connected and well-integrated with the surrounding environment in a way that facilitates access to a wide variety of destinations for people, including transport disadvantaged people?
Demand management – use complementary measures such as parking measures to manage demand and promote diverse transport options.	Are there site-specific or area-wide complementary measures that manage demand to increase public transport use in the development area? Examples include parking availability, adequate drop off zones, public transport facilities, rideshare programmes and supporting local and regional policies.
Demographics – understand how demographics influence basic, social and economic needs and their associate behavioural changes.	Will the development area significantly impact nearby communities of diverse incomes and backgrounds, for example, through housing availability and affordability?



9.7 Appendix G: Table of Integral Services including routes, frequency and hours of operation

Table 14 List of Integral Services ~~in Dunedin and Queenstown:~~

Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
Normanby - City	Route 8	North Road, George St	Urban Frequent	Every 15min (6am-7pm weekdays) Every 30min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 2	Unit 2
St Clair - City		Macandrew Road, King Edward St, Princes St				
Halfway Bush - City	Route 44	Taieri Rd, Stuart St	Common section Urban Frequent	Common section Every 15min (6am-7pm weekdays) Every 30min (7pm-11pm weekdays, 7am-11pm weekends) Branches Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 4	Unit 2
Brockville - City	Route 55	Brockville Rd, Kaikorai Valley Rd, Stuart St	Branches Urban Connector			
St Kilda - City	Routes 44 and 55	Victoria Rd, Prince Edward St, Princes St				
Balclava - City - University	Route 63	Mornington Rd, Glenpark Ave, High St, Great King St, Albany St, Union Street	Urban Frequent	Every 15min (6am-7pm weekdays) Every 30min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 1	Unit 1
Pine Hill - City	Route 5	Pine Hill Rd, George St	Urban Connector		Unit 3	Unit 1



Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
Calton Hill – City		South Rd, Princes St		Every 20min (6am-9am, 3pm-6pm weekdays) Every 40min (9am – 3pm weekdays) Every 60min (6pm-11pm weekdays, 7am-11pm weekends)		
Opoho – City	Route 10	Signal Hill Rd, George St	Urban Connector	Every 20min (6am-9am, 3pm-6pm weekdays) Every 40min (9am – 3pm weekdays) Every 60min (6pm-11pm weekdays, 7am-11pm weekends)	Unit 3	Unit 3
Shiel Hill – City		Highcliff Rd, Musselburgh Rise, Andersons Bay Rd, Princes St				
Ridge Runner	Route 15	Union St, Dundas St, Bank St, Highgate, Mailer St, Glen Rd, Hillside Rd	Urban Connector	Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 3	Unit 1
Concord – City – University	Route 37	Main South Rd, Kaikorai Valley Rd, Stuart St, Great King St, Albany St, Union St	Urban Connector	Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 1	Unit 1
Port Chalmers – City	Route 14	Harrington St, Carey’s Bay, SH88, Sawyer’s Bay, Union St, Albany St, Great King St	Urban Connector	Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 1	Unit 4
Peninsula – City	Route 18	Regular service Portobello Rd, Portsmouth Dr, Midland St, Princes St	Regular service Urban Connector Extension to Harington Point	Regular service Every 30min (6am-9am and 3pm-6pm weekdays) Every 60min (9am -3pm and 6pm-11pm weekdays, 7am-11pm weekends)	Unit 1	Unit 4



Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
		<i>Extension to Harington Point</i> Harington Point Rd, diversion through Harwood	Regional Secondary	<i>Extension to Harington Point</i> Up to 5 trips per day		
Belleknowes – City	Route 19	Kenmure Rd, Highgate, Ross St, Arthur St, Stuart St	Urban Connector	Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 4	Unit 3
Waverley – City		Larnach Rd, Belford St, Somerville St, Musselburgh Rise, Andersons Bay Rd, Princes St				
Ross Creek – City	Route 3	Tanner Rd, Fulton Rd, Malvern St, George St	Urban Connector	Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 4	Unit 2
Ocean Grove - City		Tomahawk Rd, Victoria Rd, Royal Cres, Andersons Bay Rd, Princes St				
Helensburgh - City	Route 50	Wakari Rd, Balmacewan Rd, Drivers Rd, Pitt St	Urban Connector	Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 2	Unit 2
Corstorphine – City via St Clair Park		Middleton Rd, Aberdeen Rd, Hillside Rd, Princes St				
Wakari – City	Route 33	Greenhill Balmacewan Ave, Rd,	Urban Connector	Every 30min (6am-7pm weekdays)	Unit 2	Unit 2



Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
		Chapman St, Nairn St, Stuart St		Every 60min (7pm-11pm weekdays, 7am-11pm weekends)		
Corstorphine – City via South Rd		Middleton Rd, Corstorphine Rd, South Rd, Burns St, Hillside Rd, Princes St				
Kenmure - City	Route 61	Kaikorai Valley Rd, Kenmure Rd, Stanley St, Elgin Rd, Mailer St, High St	Urban Connector	Every 30min (6am-7pm weekdays) Every 60min (7pm-11pm weekdays, 7am-11pm weekends)	Unit 4	Unit 4
Mosgiel – City via Green Island	Route 77	Factory Rd, Gordon Rd, Main Rd (Fairfield), Main South Rd, SH1, Andersons Bay Rd, Hillside Rd, Princes St	Urban Connector	Every 15min (6am – 9am and 3pm – 6pm weekdays) Every 30min (9am – 3pm and 6pm-11pm weekdays, 6am-11pm weekdays)	Unit 5	Unit 5
Mosgiel – City Express	Route 78	Factory Rd, Gordon Rd, Princes St	Urban Targeted	Every 30 min (6am-9am weekdays to City, 3pm-6pm weekdays to Mosgiel. No off-peak or weekend service.	Unit 5	Unit 5
Brighton – Abbotsford – Green Island	Route 70	Main route Brighton Rd, North Taieri Rd, Paterson St, Main South Rd Extension Kaikorai Valley Rd	Main route Urban Connector Extension Urban Targeted	Every 30min (6am-9am and 3pm-6pm weekdays) Every 60min (9am -3pm and 6pm-11pm weekdays, 7am-11pm weekends)	Unit 5	Unit 5
Mosgiel On-Demand	To be determined	Streets in Mosgiel, Wingatui	Urban Connector	Service available 9am-6pm weekdays. 30-minute expected wait-time.	Unit 5	Unit 5



Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
Palmerston - Dunedin	Route 1	Main route Palmerston, Waikouiti, Karitane, Waitati, Dunedin Warrington service Warrington, Waitati, Dunedin	Main route Regional Secondary Warrington service Regional Daily	Main route 4 trips per day in each direction Warrington service 1 trip per day in each direction	Unit 1	Unit 7
Pine Hill – Logan Park High School	Route 95	Pine Hill Rd, Opoho Rd, Logan Park High School	Urban Targeted	1 trip per day in each direction, on school days.	Unit 3	Unit 6
Pine Hill – Dunedin North Intermediate	Route 96	Pine Hill Rd, North Rd	Urban Targeted	1 trip in afternoon peak only.	Unit 3	Unit 6
Green Island – South Dunedin	Route 40	Main South Rd, Riselaw Rd, Middleton Rd, Bay View Rd	Urban Targeted	1 trip per day in each direction, on school days.	Unit 3	Unit 6
Green Island – Otago Boys High	Route 39	Main South Rd, Kaikorai Valley Rd, Stuart St, Arthur St	Urban Targeted	1 trip per day in each direction, on school days.	Unit 1	Unit 6
Ōamaru - Dunedin	To be determined	SH1 Ōamaru - Dunedin	Urban Connector	3 trips per day in each direction	n/a	Unit 7
<u>Oamaru local</u>	<u>To be determined</u>	<u>To be determined</u>	<u>Urban Connector</u>	<u>To be determined</u>	<u>n/a</u>	<u>Unit 7</u>



Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
Balclutha - Dunedin	To be determined	SH1 Balclutha - Dunedin	Urban Connector Regional Secondary	3 trips per day in each direction	n/a	Unit 7
Remarkables Park - Sunshine Bay	Route 1	Red Oaks Drive, Airport, Frankton Rd, Stanley St, Lake Esplanade, Fernhill Rd	Urban Frequent	Every 15min (6am-7pm) Every 30min (7pm-1am)	Unit 6	Unit 8
Jacks Point - Queenstown	Route 2	Homestead Bay Rd, Howden Drive, Kingston Rd, Frankton Rd, Stanley St	Urban Connector	Every 30min (6am-9am, 3pm-7pm) Every 60min (9am-3pm, 7pm-10pm)	Unit 6	Unit 8
Arrowtown - Queenstown		Adamson Dr, Centenial Ave, Ramshaw Ln, Manse Rd, Malaghans Rd, Gorge Rd				
Lake Hayes Estate - Queenstown	Route 3	Nerin Square, Erskine St, Jones Ave, Frankton-Ladies Mile Hwy, Shearer Dr, Frankton Rd, Stanley St	Urban Connector	Every 30min (6am-9am, 3pm-7pm) Every 60min (9am-3pm, 7pm-10pm)	Unit 7	Unit 8
Arrowtown - Frankton	Route 4	Adamson Dr, Centenial Ave, Ramshaw Ln, Arrowtown-Lake Hayes Rd, Frankton-Ladies Mile Hwy	Urban Connector	Every 30min (6am-9am, 3pm-7pm) Every 60min (9am-3pm, 7pm-10pm)	Unit 7	Unit 8
Quail Rise - Frankton	Route 5	Ferry Hill Dr, Tucker Beach Rd, Frankton-Ladies Mile Hwy, Shearer Rd	Urban Connector	Every 30min (6am-9am, 3pm-7pm) Every 60min (9am-3pm, 7pm-10pm)	Unit 7	Unit 8



Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
Kelvin Heights - Frankton		Peninsula Rd, Red Oaks Dr, Kawarau Rd				
Queenstown Ferry	Route F	Hilton Hotel, Frankton Marina, Bay View, Queenstown	Urban Connector	11 trips (8am-10pm)	Unit 8	Unit 11
Queenstown – Alexandra	To be determined	Queenstown, Frankton, Cromwell, Clyde, Alexandra	Regional Secondary	4 trips per day in each direction	n/a	Unit 9
Wānaka local	To be determined	To be determined	Urban Connector	To be determined	n/a	To be determined Unit 9
Wānaka - Queenstown	To be determined	To be determined	Regional Secondary	To be determined	n/a	To be determined Unit 9
Queenstown - Wānaka	InterCity	Queenstown, Cromwell or Cadrona, Wānaka	Regional Secondary	4 trips per day in each direction	n/a	Unit 15
Christchurch – Dunedin	InterCity	Christchurch to Dunedin via Ashburton, Timaru, Oamaru	Regional Daily	2 trips per day in each direction	n/a	Unit 14
Christchurch – Queenstown	InterCity	Christchurch to Queenstown via Tekapo	Regional Daily	1 trip per day in each direction	n/a	Unit 14
Dunedin - Queenstown	InterCity	Dunedin to Queenstown via Milton, Alexandra, Cromwell	Regional Daily	1-2 trips per day in each direction	n/a	Unit 14



Service	Service identifier Branding	Streets/areas served (not exhaustive)	Network layer	Headway and approximate hours of operation	Current unit	Future unit
Dunedin – Invercargill	InterCity	Dunedin to Invercargill via Gore	Regional Daily	1 trip per day in each direction	n/a	Unit 14
Queenstown – Te Anau	InterCity / GreatSights	Queenstown to Te Anau via Kingston	Regional Daily	1 trip per day in each direction	n/a	Unit 14
Queenstown – West Coast	InterCity	Queenstown to Franz Joseph via Wānaka	Regional Targeted	Trips operate less than daily.	n/a	Unit 14
Queenstown - Invercargill	Catch-a-Bus South	Queenstown to Invercargill	Regional Targeted	Trips operate less than daily.	n/a	Unit 14
Total Mobility	various	Dunedin, Oamaru, Queenstown, Wānaka, Balclutha, Alexandra, other areas according to supplier availability	Urban Targeted, Regional Targeted	Trips operate on-demand for limited users	n/a	Unit 12
Community Transport	various	Any area of Otago	Regional Targeted	Varies depending on service	n/a	Unit 13
Special Event service	Various	As required to support contracted services during a special event	Urban Targeted or Regional Targeted	Varies by case	n/a	Closest relevant contracted unit



9.8 Appendix H: Tables of units

9.8.1 Current contractual units

Table 15 The units whose contracts are active as of the commencement of this RTP.

Unit Number, Name, and Mode	Geographic Description	Contract Duration	Comment
Unit 1: East-West connections and regional (Bus)	<ul style="list-style-type: none">Central Dunedin to:<ul style="list-style-type: none">Balaclava via Mornington,Concord via Kaikorai Valley,Logan Park via UniversityPort Chalmers via UniversityPeninsulaPalmerstonTargeted school trips between Green Island and Otago Boys' High	September 2017 – September 2026	Transition routes to new unit structure upon expiry
Unit 2: South Dunedin and Connections (Bus)	<ul style="list-style-type: none">Central Dunedin to:<ul style="list-style-type: none">NormanbySt ClairCorstorphine via Hillside Rd and Middleton RdCorstorphine via Hillside Rd and CavershamWakari via Stuart StHelensburgh via Maori Hill	September 2017 – September 2026	Transition routes to new unit structure by contract variation



Unit Number, Name, and Mode	Geographic Description	Contract Duration	Comment
Unit 3: North Dunedin and Connections (Bus)	<ul style="list-style-type: none">Central Dunedin to:<ul style="list-style-type: none">Shiel HillCalton HillPine HillOpohoSouth Dunedin to University via Mornington, Maori Hill, GardensTargeted school trips between:<ul style="list-style-type: none">Pine Hill, Dunedin North Intermediate, Logan Park High SchoolGreen Island and South Dunedin schools	October 2022 – March 2031	Transition routes to new unit structure by contract variation
Unit 4: South-East and Connections (Bus)	<ul style="list-style-type: none">Central Dunedin to:<ul style="list-style-type: none">WaverleyOcean GroveSt KildaKenmure via MorningtonBelleknowes via Stuart StBrockville via Stuart StHalfway Bush via Stuart StRoss Creek	August 2016 – August 2028	Transition routes to new unit structure by contract variation



Unit Number, Name, and Mode	Geographic Description	Contract Duration	Comment
Unit 5: South-West Dunedin (Bus)	<ul style="list-style-type: none">Central Dunedin to Mosgiel:<ul style="list-style-type: none">via Green Island and FairfieldTargeted express servicesGreen Island to:<ul style="list-style-type: none">BrightonAbbotsfordOn-demand service in Mosgiel.	July 2025 – June 2034	Unit to be maintained in new unit structure
Unit 6: Southern Corridor and Connections (Bus)	<ul style="list-style-type: none">Central Queenstown to:<ul style="list-style-type: none">Jack's Point via FranktonArrowtown via Arthur's PointSunshine BayRemarkables Park via Frankton and Airport	November 2017 – November 2026	Extent contract to match Unit 7 and transition routes to new unit structure on expiry
Unit 7: Eastern Corridor and Connections (Bus)	<ul style="list-style-type: none">Frankton to:<ul style="list-style-type: none">ArrowtownQueenstownLake Hayes EstateQuail RiseKelvin Heights	November 2017 – November 2029	Transition routes to new unit structure on expiry
Unit 8: Lake Whakatipu (Ferry)	<ul style="list-style-type: none">Queenstown to Hilton Hotel via:<ul style="list-style-type: none">Kelvin HeightsFrankton Marina	July 2020 – June 2025	Procure new contract



9.8.2 Future contractual units

Table 16 The units and contracts we will seek to transition to in the future.

Unit Number, Name, and Mode	Geographic Description	Contract Duration	Comment
Unit 1: University and Connections (Bus)	Central Dunedin to: <ul style="list-style-type: none">o Pine Hillo Calton Hill via Cavershamo Logan Park via Universityo Balaclava via Morningtono Concord via Kaikorai Valley [Option: move to Unit 5 and replace with Central Dunedin to Kenmure via Mornington] South Dunedin to University (via Mornington Māori Hill, Gardens)	September 2026 – June 2035	
Unit 2: South Dunedin and Connections (Bus)	Central Dunedin to: <ul style="list-style-type: none">o Normanbyo St. Clairo St Kildao Corstorphine via Hillside Rd. and Middleton Rd.o Corstorphine via Hillside Rd. and Cavershamo Brockville via Stuart Sto Halfway Bush via Stuart Sto Wakari via Stuart St.o Helensburgh via Māori Hillo Ross Creeko Ocean Grove	September 2026 – June 2038	



Unit 3: South-East Dunedin and Connections (Bus)	Central Dunedin to: <ul style="list-style-type: none">Shiel HillWaverleyBelleknowes via Stuart StOpoho	To be confirmed	
Unit 4: Miscellaneous Routes (Bus)	Central Dunedin to: <ul style="list-style-type: none">Kenmure via Mornington [Option: Move to Unit 1 in place of Central Dunedin to Concord]Port Chalmers via UniversityPeninsula	To be confirmed	
Unit 5: South-West Dunedin (Bus)	Central Dunedin to Mosgiel <ul style="list-style-type: none">Via Green Island and FairfieldTargeted express services Green Island to: <ul style="list-style-type: none">BrightonAbbotsford On-demand service in Mosgiel	July 2025 – June 2034	
Unit 6: Dunedin Schools (Bus)	Green Island to: <ul style="list-style-type: none">South Dunedin schoolsOtago Boy's High School Pine Hill to: <ul style="list-style-type: none">Logan Park High SchoolDunedin North Intermediate	To be confirmed	Expected to be served by older diesel buses to make full use of assets.
Unit 7: Dunedin Regional (Bus)	<ul style="list-style-type: none">Dunedin to Oamaru via PalmerstonWeston to Oamaru North via South Hill	TBC To be confirmed	Only Dunedin to Palmerston area can be served with current funding.



	<ul style="list-style-type: none">• On-demand in OamaruLocal Oamaru service• Dunedin to Balclutha via Airport		Other services will need to be contractual options.
Unit 8: Queenstown Urban (Bus)	<ul style="list-style-type: none">• Frankton to Queenstown• Queenstown to:<ul style="list-style-type: none">◦ Sunshine Bay◦ Arrowtown via Arthur's Point• Frankton to:<ul style="list-style-type: none">◦ Jacks Point◦ Lake Hayes Estate◦ Arrowtown◦ Quail Rise◦ Kelvin Heights	November 2029 – June 2041	Contract will include staged service increases and gradual introduction of new fleet, subject to funding
Unit 9: Queenstown School (Bus)	<ul style="list-style-type: none">• Same geographic area as Queenstown Urban.	November 2028-2029 – June 2035	Not currently funded.
Unit 10: Queenstown Regional (Bus)	<ul style="list-style-type: none">• Queenstown to Alexandra via Cromwell, Clyde• Queenstown to Wanaka• Local Wanaka service	November 2028-2029 – June 2035	Not currently funded.
Unit 11: Lake Whakatipu (Ferry)	Queenstown CBD to Hilton Hotel via: <ul style="list-style-type: none">◦ Kelvin Heights◦ Frankton Marina	July 2025 – June 2030	



9.8.3 Exempt integral units

Table 17 Existing and potential future exempt integral units in Otago.

Unit Number, Name, and Mode	Geographic description	Contract expiry	Comment
Unit 12: Total Mobility (small-vehicle)	All areas of Otago	June 2026 (multiple contracts)	Small-vehicle financial assistance is permitted
Unit 13: Community Transport (small-vehicle)	All areas of Otago	Not applicable	Small-vehicle financial assistance is permitted
Unit 14: Integral coach services (bus)	Exempt routes on [current regional map], excluding Wānaka – Queenstown connection	Not applicable	Financial assistance for the purpose of fare reduction is permitted
Unit 15: Wānaka-Queenstown (bus)	Wānaka to Queenstown via: <ul style="list-style-type: none">CromwellCadrona	Not applicable	Financial assistance for the purpose of fare reduction is permitted



9.9 Appendix I: Cost recovery and measuring private share of operating cost

This appendix provides further information about measuring the private share of public transport service operating cost. It also presents the context and detail supporting our private share policy FS P2 set out in Section 6 (Value for money) of this plan. Further, this appendix has been developed to respond to a requirement by NZTA to detail our private share targets in our RPTP.

9.9.1 Background

Value for money is a strategic priority guiding all transport investments under the GPS 2024. This means there is a focus on achieving greater value from the financial investment in public transport activities funded through the NLTP. The GPS includes an expectation for Public Transport Authorities (PTAs) to actively work towards increasing private share revenue (fares and third-party revenue).

Although this presents challenges to ORC and the ambitions that we and our community have for public transport, our NLTP funding is an essential part of how we ensure value for money for our own ratepayers. As such, we will actively work to grow the private share contribution to the costs of our services. By doing so, we will support the continuity of funding for existing services and place ourselves in the best possible position to seek funding for future public transport improvements.

9.9.2 Private share

Private share is a measure of cost recovery and represents the proportion of public transport operating expenditure funded from private revenue sources. In previous RPTPs, cost recovery was referred to as farebox recovery. NZTA have recently changed their cost recovery policy framework including redefining farebox recovery to private share of operating expenditure.

Private share is calculated using the following formula¹⁰:

Private share of operating expenditure = $\frac{\text{Total private revenue}}{\text{Total operating expenditure}}$

Where:

Private revenue =		Operating expenditure =	
	Passenger fares	Passenger services	Total gross expenditure on public transport services, prior to applying any subsidies
+	Private fare substitutes		
	Commercial revenue		
+		Operations and maintenance	Total gross expenditure on the maintenance, operations and management of public transport services and infrastructure, prior to applying any subsidies.
+	Enforcement fees		

The government’s aim is to increase private share to support the increased costs of public transport and reduce the pressure on ratepayers and taxpayers.

¹⁰ Total Mobility private share is not included in the public transport private share calculations or targets.



9.9.3 Increasing private share

Measuring cost recovery is important to assess the distribution of operating costs between users and funders. **Error! Reference source not found.** below indicates how operating costs for public transport are distributed between funders. Private share reflects the private benefits of users of public transport, while the public share reflects public transport's benefits to road users, the environment and wider community outcomes. Increasing private share will reduce the amount of public subsidy required to meet our total operating costs.

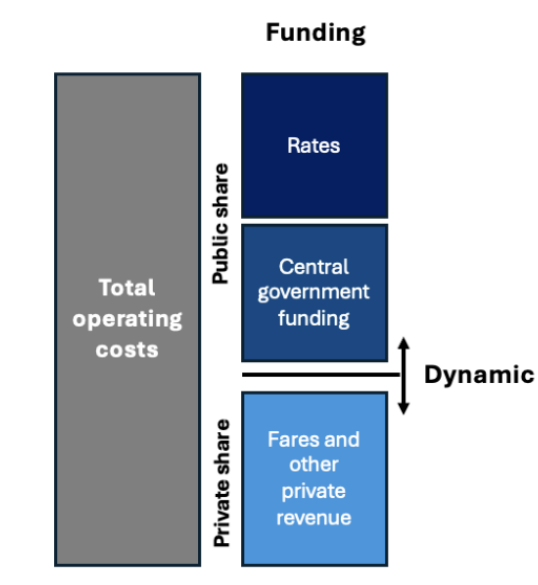


Figure 16 A depiction of how operating costs for public transport are distributed between funders.

Private share can be increased by:

- increasing patronage to collect more fare revenue
- reducing operating costs by optimising or cutting services
- increasing the average fare paid by increasing the base fare or changing the fare structure
- growing third-party revenue streams, such as advertising

With a complex interaction of factors influencing people's decision to use (and pay for) public transport, how we increase private share over time to meet our private share targets will require careful management. Adjusting anything too quickly or without careful consideration may undo our recent patronage gains and negatively impact private share revenue.

Error! Reference source not found. outlines the implications and tradeoffs that we will carefully manage.

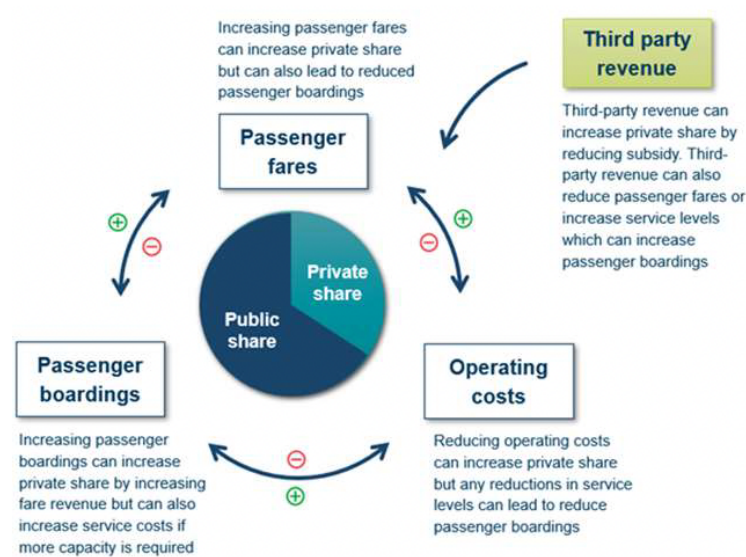


Figure 17 Interactions between patronage, fares and service level.

Passenger fares

Public transport provides choice and an alternative to using the private car. This means the relationship between bus fares and the cost of driving (petrol costs, parking costs) is particularly important, and provides a useful comparator for how much we can adjust our public transport fares. The average private-share contribution in Otago is \$1.45 per trip (mostly coming from fares), compared to a private car running cost of \$1.25¹¹. This means that, due to relatively short average trip lengths on most public transport routes, Otago has one of New Zealand's highest average fares compared to private car operating costs. This leaves little room for us to increase fares.

Service optimisation

Public transport costs largely come from:

- the cost of paying drivers and supporting staff to operate and maintain vehicles
- the cost of vehicles – both in purchasing vehicles and batteries, and daily running costs such as fuel or electricity
- infrastructure costs: both passenger infrastructure such as bus stops, stations, and bus lanes, and operational infrastructure such as depots.

If we can make more efficient use of drivers, vehicles, and infrastructure, then we can reduce the amount we spend on public transport, or deliver a greater amount of service for the same cost. This will improve our financial performance (including private share) and put us in a better position to attract funding for future investments.

Areas of potential optimisation include:

- reducing out-of-service running through:

¹¹ Note: Private car costs have been calculated using a simplified methodology which is simply the *IRD 2023/24 per kilometre rate for running costs only (\$0.30 excl. GST) multiplied by the average public transport trip length in our region. This comparison excludes costs such as parking and congestion.*



- timetable and route design
- availability of depots and driver break facilities that are close to routes
- avoiding excessively indirect routes
- priority infrastructure such as bus lanes to speed up trip times, especially at peak
- easy fare payment to speed up getting on and off our services
- making full use of assets such as buses across their whole lifetime
- technological solutions to inform efficient deployment of vehicles and drivers.

9.9.4 Private share targets

Our 2023/2024 private share of operating costs was 18.7%. This is a strong result and well above regions and networks of a similar size (**Error! Reference source not found.**).

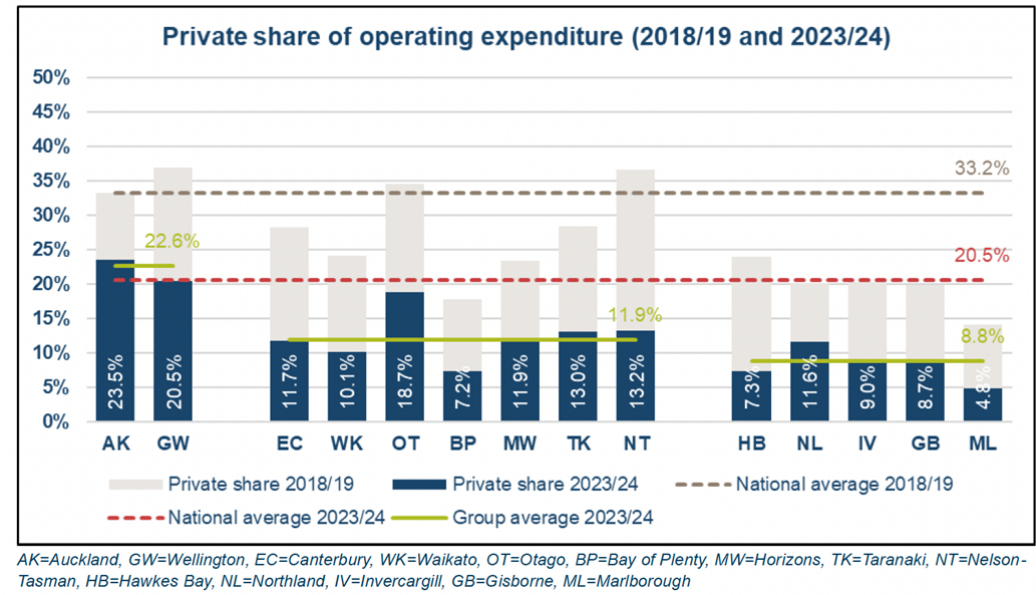


Figure 18 Regional comparison of private share (Source: NZTA 2024).
ORC has included Policy FS P2 to actively work towards increasing private revenue contribution to the cost of public transport over time in this RPTP. This supports the direction from central government to actively work towards increasing private share to offset the cost to ratepayers and the taxpayer for public transport services.

Our private share or operating targets for the next three years are:

- 20% for the 2024/2025 year
- 23.5% for the 2025/2026 year
- 30.25% for the 2026/2027 year

Council recognises that our ambition to increase private share must be balanced with a lens of realism in terms of the mechanisms we have to do this in Otago. Fiscal sustainability must also be balanced with the wider community outcomes we value.





10 Glossary

Term	Definition
Action	Specific items of work that we intend to undertake in the next 3-10 years.
Community Transport	Not-for-profit service established, funded and operated by community entities to enhance transport access in areas where traditional public transport is not feasible.
Engagement	The process of two-way dialogue between ORC and our iwi partners, stakeholders and communities; both formal and informal.
Key stakeholders	Individuals (as well as groups of individuals, organisations or a political entity), with a specific stake in the outcome of a decision affecting a policy, project or proposition (e.g. NZTA, territorial authorities and public transport operators).
Motu Move	A national ticketing and payment system providing easy, consistent ways to pay for buses, trains and ferries across Aotearoa. Motu Move is expected to be launched in Otago in 2026.
Off-peak hours	Weekdays 9am until 3pm, <u>and after 6.30pm</u> , weekends and public holidays
Orbus	ORC's brand for public bus and ferry services in Dunedin and Queenstown.
Policy	ORC's position on a particular topic that we will refer to when we make decisions about our public transport network.
Partner agencies	ORC works closely in both the strategic decision-making, funding and delivery of our public transport system with our partner agencies NZTA and our region's territorial authorities/road controlling authorities.
Peak hours	Weekdays before 9am and from 3pm to 6:30pm.
Public transport operators	Entities who are contracted by ORC to deliver public transport services and who typically provide resources and infrastructure, including buses, ferries, drivers and depots.



Territorial authorities	A tier of local government which administer the districts and cities alongside regional councils. There are five territorial authorities in Otago: Central Otago District Council, Clutha District Council, Dunedin City Council, Queenstown Lakes District Council and Waitaki District Council.
Total Mobility	A nationwide scheme that provides subsidised door-to-door transport services for eligible people with disabilities through approved commercial taxi and mobility operators.
Transport-disadvantaged people	Groups of people who face difficulties in accessing transportation due to various factors such as disabilities, low income or age (e.g. disabled people, children or people in isolated rural locations).
Unit	All services that are integral to the region's public transport network are grouped into units.



11 List of acronyms

CDC	Clutha District Council
CODC	Central Otago District Council
DCC	Dunedin City Council
GPS	Government Policy Statement
LTMA	Land Transport Management Act
LTP	Long-Term Plan
NLTF	National Land Transport Fund
NLTP	National Land Transport Programme
NTS	National Ticketing Solution
NZTA	New Zealand Transport Agency Waka Kotahi
ORC	Otago Regional Council
PTA	Public Transport Authority
PTO	Public Transport Operator
QLDC	Queenstown Lakes District Council
RLTP	Regional Land Transport Plan
RPTP	Regional Public Transport Plan
RUB	Requirements for Urban Buses
WDC	Waitaki District Council

Attachment 4: List of Submitters Heard on the draft Regional Public Transport Plan 2025-2035

This attachment outlines the list of submitters on the draft Regional Public Transport Plan 2025-2035 who were heard at public hearings from 13 to 16 May 2025.

Name	Organisation	Submitter ID
DUNEDIN – 13 MAY 2025		
Duncan Eddy	West Harbour Community Board	RPTP-0477
Dave Kearns	Rail & Maritime Union	RPTP-0522
Dave MacPherson	Save Our Trains	RPTP-0344
Donna Peacock		RPTP-0514
Cheryl Dodds		RPTP-0485
Ian Duncan (Supported by Garry Maloney)	New Zealand Transport Agency	RPTP-0539
Jacqui Eggleton	CCS Disability Action (Local Advisory Committee - Waitaki)	RPTP-0544
Alex King		RPTP-0549
Peter Dowden		RPTP-0432
John Robertson		RPTP-0377
Amie Pont		RPTP-0437
Rachel Elder		RPTP-0499
Mayor Jules Radich	Dunedin City Council	RPTP-0478
Ashling Coffey		RPTP-0530
DUNEDIN – 14 MAY 2025		
Eve O’Brien	Central Otago Friendship Network	RPTP-0464
Daniel Jolly		RPTP-0461
Julie Woods	Access Matters Aotearoa	RPTP-0245
Aaron Hawkins (On behalf of Alex Macmillan)	Cosy Homes Charitable Trust/ Otago Housing Alliance	RPTP-0525
Fiona Rissell		RPTP-0484
Mary O'Brien	CCS Disability Action	RPTP-0527
Alasdair Morrison	Waikouaiti Coast Community Board	RPTP-0540
Jett Groshinski	Otago University Student's Association	RPTP-0520
Jo Millar	Grey Power Otago	RPTP-0432
David Barrell		RPTP-0377
Geraldine Tait		RPTP-0428
QUEENSTOWN – 16 MAY 2025		
Julie Taverner	Hato Hone St John	RPTP-0473
Amanda Robinson	The Lightfoot Initiative	RPTP-0542
Sierra Alef-Defoe		RPTP-0221
Catkin Bartlett	Central Lakes Breastfeeding Charitable Trust	RPTP-0300
Marian Krogh	Protect Our Winters NZ	RPTP-0434
Brian Fitzpatrick	Remarkables Park Limited	RPTP-0541
Richard Kemp		RPTP-0333

10.2. Annual Plan 2025-26 - Adoption**Prepared for:** Council**Report No.** GOV2548**Activity:** Governance Report**Author:** Jasmin Lamorie (Senior Corporate Planner), Nick Donnelly (General Manager Finance).**Endorsed by:** Amanda Vercoe, General Manager Strategy and Customer**Date:** 25 June 2025**PURPOSE**

- [1] The purpose of this report is to adopt the Otago Regional Council Annual Plan 2025-26 and enable the subsequent approval of rates and charges for the 1 July 2025 to 30 June 2026 financial year. As part of adopting the Annual Plan, this report enables Council to formally approve changes to the draft estimates and work programme, which were provided to the community for feedback.

EXECUTIVE SUMMARY

- [2] On 27-28 May 2025 Council deliberated on the draft Annual Plan financial estimates, associated work programmes, community feedback and updated financial forecasts. Council directed staff to make further adjustments to the draft position, with additional changes related to services and funding of activities such as Transport, Land and Water, and Regional Planning.
- [3] Although the Annual Plan 2025-26 largely reflects the work programmes as consulted and agreed in year two of the Long-Term Plan (LTP), there are some adjustments. Notable changes include removal of some Transport work as a result of reduced government co-funding, the addition of contracted Transport costs not included in the LTP, the re-scheduling of Land and Water planning work to reflect central government direction, amended Air plan and Air Strategy timing as a result of Council decision, and the timing of some flood protection and drainage work.
- [4] As a result, the operating expenditure has subsequently reduced by \$3.324 million from the LTP year two estimate, with a total operating expenditure of \$140.634 million planned for the Annual Plan 2025-26.
- [5] The associated rates requirement for the Annual Plan 2025-26 is \$68.467 million, which is a reduction of \$5.357 million (-8.3%) against the estimated LTP year two rates, while also reflecting an increase of \$3.574 million (5.5%) against the current year 2024-25 (LTP year one).
- [6] This report identifies changes to budgets, work programmes, and levels of service. The attached Annual Plan provides detail of the work programmes and financial position, which enables Council to review, formally adopt the Annual Plan 2025-26 and approve the corresponding rates.

RECOMMENDATION

That the Council:

- 1) **Notes** the recommendations from Council's 27-28 May 2025 Annual Plan Deliberation meeting have been communicated to council management for action and inclusion in 2025-26 work programmes.
- 2) **Notes** the changes that have been made to the approved draft Annual Plan financial estimates that are included in the Annual Plan 2025-26, as attached to this report.
- 3) **Approves** the Otago Regional Council Schedule of Fees and Charges applicable from 1 July 2025.
- 4) **Resolves** that having considered the matters in section 100(2) of the Local Government Act 2002, it is financially prudent to have an annual operating surplus of \$730,000 for the 2025-2026 Annual Plan year.
- 5) **Adopts** the Otago Regional Council Annual Plan 2025-26, as attached to this report.
- 6) **Approves** the delegation of minor editorial corrections and formatting of the Annual Plan 2025-26 to the Otago Regional Council Chief Executive.

BACKGROUND

- [7] Council has reviewed the work programmes and estimated budgets for year two of the Long-term Plan 2024-34 via an annual planning process. This statutory process has required Council to consider what change, if any, is required to the financial estimates and associated work programme from the LTP position adopted in June 2024.
- [8] In March 2025 the Council resolved to seek community feedback on the draft proposal for the Annual Plan 2025-26. The consultation period ran from 17 March - 15 April 2025.
- [9] There were 51 submissions received on the draft Annual Plan during this period. Submissions included feedback on the draft Plan, policy recommendations, fees and charges feedback, and service requests. Although there was not a huge volume of submissions asking Council to change the Annual Plan, there were requests for Council to do more – particularly in Transport. Other topics noted in submissions included the new large-scale environment fund, rates and expenditure, fees and charges, biodiversity strategy, climate change strategy, flood protection and river management, pollution response, and catchment plans.
- [10] Annual Plan Hearings were held in Dunedin on 27 May 2025 with 11 submitters speaking to their submissions, either in-person or via Zoom.
- [11] Formal deliberation on the public submissions to the Otago Regional Council Annual Plan 2025-26 process occurred at a Finance Committee meeting on 27-28 May 2025. Council considered the public feedback, in conjunction with background information and updated financial forecasts.
- [12] The Finance Committee meeting concluded with directions to staff on completing the Annual Plan 2025-26 for adoption at the 25 June 2025 Council meeting. Directions covered a range of matters for Council staff to address including:

Land and Water Regional Planning:

- \$700,000 to be carried forward from 2024-25 current year underspend, resulting in a reduced rating requirement for this work in 2025-26.

Regional Policy Statement (RPS):

- \$500,000 to be removed from 2025-26 budget as the RPS is progressing ahead of schedule and budget, with lower than anticipated legal expenses, resulting in a reduced rating requirement for this work in 2025-26.

Public Transport

- Dunedin: Additional unfunded works to be rate funded for 2025-26, with the overspend for 2024-25 to be funded from reserves.
- Queenstown: Additional unfunded works for 2025-26, along with the overspend for 2024-25, to be funded from reserves.
- Transport Planning: Reinstate the Wānaka/Upper Clutha Business case, which was originally in the LTP but removed in the draft Annual Plan due to the lack of government co-funding.
- Transport Infrastructure: Prioritisation of actions resulting from the public transport infrastructure audit.

New Large-Scale Environment Fund:

- Up to \$2 million to be allocated through this new fund, to be funded from reserves for 2025-26.

Managed Fund:

- Staff to provide a report on how to fund an investigation into using funds from the managed fund to increase ORC's contribution to biodiversity and biosecurity needs.

- [13] Council staff have included the required changes in the Annual Plan based on the direction given.

DISCUSSION

- [14] Following the review of the LTP year two financial estimates and work programme, and after consideration of community feedback, Council is in the position to adopt the 2025–26 Annual Plan. Adoption of the Plan enables Council to:
- Provide certainty to the community regarding services and rate requirements,
 - Implement key reporting and revenue processes,
 - Meet core planning legislative requirements.
- [15] Attachment 1 of this report provides the Annual Plan 2025-26. Following adoption, the only changes that will occur to attached version are:
- Corrections resulting from a final and detailed editorial proof,
 - Minor design work to improve formatting of the document,
 - Any further recommendations of Council from its 25 June 2025 meeting.

Work programme and adjustments

- [16] Year two of the LTP included a number of additional or expanded work programmes resulting in a planned increase in expenditure, and in some cases rates. Key items which remain in the Annual Plan 2025-26 and are an increase from the current year 2024-25 (LTP year one) include a new large-scale environmental fund, a climate change strategy, a biodiversity strategy, and some upgraded public transport services in Queenstown.
- [17] Although the Annual Plan 2025-26 largely reflects the work programme as consulted and agreed in year two of the LTP, there are some adjustments. Notable changes include:

- Some public transport improvements and trials in Dunedin, Queenstown and the regions not going ahead due to reduced government co-funding,
- Addition of contracted Transport costs not included in the LTP relating to the Mosgiel express service in Dunedin and CPI indexation adjustments in both Dunedin and Queenstown,
- Re-scheduling of Land and Water planning work to reflect central government direction,
- Amended timeframe for Regional Air Plan and the related Air Strategy as a result of Council seeking further community input,
- Extended timeframes for some flood protection and drainage work. Although more work is planned across the region over the long term, 2025-26 will focus on planning for efficient project delivery in subsequent years.

Financial position and adjustments

- [18] The full suite of required financial and funding statements have been completed and included in the Annual Plan provided for adoption. They reflect the recommendations of the 27-28 May 2025 Finance Committee meeting which directed staff on required adjustments.
- [19] The planned operating expenditure at the activity level for 2025-26 is outlined in Table 1. The total expenditure of \$140.634 million, is lower than the estimated \$143.958 million which was consulted and agreed with the community for LTP year two. The revised total expenditure represents a decrease of \$3.324 million compared to LTP year two, while also reflecting an increase of \$9.574 million against the current year 2024-25 (LTP year one).
- [20] The planned increase is driven by expanded work programmes, as described in paragraph 16, inflation, rental costs for Whare Rūnaka, insurance costs and increased depreciation costs.
- [21] The Annual Plan 2025-26 expenditure by group of activity and the comparison to the LTP year one (current year 2024-25) and LTP Year two estimates is shown in table 1.

OPERATING EXPENDITURE (\$'000)	LTP (Yr1) 24/25	LTP (Yr2) 25/26	AP 25/26	AP vs LTP (yr1) 24/25	AP vs LTP (yr2) 25/26
Governance & Community	13,343	15,165	15,518	2,174	352
Regional Planning	2,925	3,066	2,640	(285)	(426)
Regulatory	12,568	13,846	14,173	1,605	327
Regional Leadership	28,836	32,077	32,331	3,495	254
Land & Water	20,140	21,875	20,125	(15)	(1,750)
Biodiversity & Biosecurity	8,955	12,013	11,996	3,042	(16)
Air	1,377	1,792	1,769	392	(23)
Environment	30,472	35,680	33,891	3,418	(1,789)
Climate Change & Hazards	3,524	3,454	3,438	(86)	(16)
Emergency Management	3,730	4,018	4,000	270	(18)
Flood & Rivers	11,191	13,579	12,189	998	(1,390)
Climate Change & Resilience	18,445	21,052	19,627	1,182	(1,424)

Transport	41,950	45,995	46,637	4,687	642
Internal	11,357	9,154	8,148	(3,209)	(1,006)
TOTAL EXPENDITURE	131,060	143,958	140,634	9,574	(3,324)
<i>Movement from prior year \$</i>	<i>9,737</i>	<i>12,898</i>	<i>9,574</i>		
<i>Movement from prior year %</i>	<i>8.0%</i>	<i>9.8%</i>	<i>7.3%</i>		
TOTAL CAPEX	18,993	12,402	20,556	1,563	8,154

[22] The funding for the Annual Plan includes a mix of general and targeted rates, grants, dividends, fees and charges, reserves and other income sources. Funding sources and the associated revenue required to cover the costs of Council activity are shown in Table 2:

OPERATING FUNDING (\$'000)	LTP1 24/25	LTP2 25/26	AP 25/26	<i>AP vs LTP (yr1) 24/25</i>	<i>AP vs LTP (yr2) 25/26</i>
General Rates	29,046	32,143	31,160	2,114	(982)
Targeted Rates	35,846	41,680	37,306	1,460	(4,374)
Total Rates	64,892	73,823	68,467	3,574	(5,357)
Grants	21,991	23,814	25,162	3,171	1,348
Fees & Charges	4,364	4,729	5,348	984	619
Bus Fares	6,969	7,541	8,274	1,304	733
Other Income	3,167	6,739	6,356	3,190	(382)
Dividends	18,000	20,000	20,000	2,000	-
Interest & Other Gains	11,088	8,738	6,090	(4,998)	(2,647)
Reserves	588	(1,425)	937	349	2,362
Total Non-Rates	66,167	70,134	72,167	6,000	2,033
TOTAL REVENUE	131,060	143,958	140,634	9,574	(3,324)

[23] The percentage changes in funding by source, compared to the prior year, are shown in Table 3:

OPERATING FUNDING (percentage increase)	LTP1 24/25	LTP2 25/26	AP 25/26	<i>AP vs LTP (yr2) 25/26</i>
General Rates	2.8%	10.7%	7.3%	-3.4%
Targeted Rates	30.3%	16.3%	4.1%	-12.2%
Total Rates	16.3%	13.8%	5.5%	-8.3%
Grants	7.3%	8.3%	14.4%	6.1%
Fees & Charges	-26.7%	8.4%	22.5%	14.2%
Bus Fares	14.2%	8.2%	18.7%	10.5%
Other Income	-57.6%	112.8%	100.7%	-12.1%
Dividends	20.0%	11.1%	11.1%	-
Interest & Other Gains	-2.3%	-21.2%	-45.1%	-23.9%
Reserves	-172.1%	-342.5%	59.4%	402.0%
Total Non-Rates	0.9%	6.0%	9.1%	3.1%
TOTAL REVENUE	8.0%	9.8%	7.3%	-2.5%

Rates revenue and adjustments

- [24] The total Annual Plan 2025-26 rating revenue (general and targeted rates) is \$68.467 million. This is a reduction of \$5.357 million (-8.3%) from the adopted LTP Year two estimated rates, while also reflecting a total rates increase of \$3.574 million (5.5%) compared to the current year 2024-25 (LTP year one).
- [25] The lower than estimated rates increase is the result of underspends in regional planning and in land and water planning, removal of some planned public transport upgrades, work to gain efficiencies, reduced inflation costs, increased Port Otago dividend and deliberation decisions to fund the new large-scale environment fund, deferred LWRP costs and new bus services in Queenstown through reserves in 2025-26.
- [26] The impact of final rates increase on the median value property in each district is shown in the table below. Note this table has been expanded from the version provided in the consultation material to provide an example property including and excluding the public transport targeted rate in Dunedin, Queenstown and Waitaki.

- [27] Median property rates examples

District	Median CV	Rates 2024/25 (Incl GST)	Rates 2025/26 (Incl GST)	Increase \$	Increase %
Central Otago	740,000	332.23	340.94	8.71	2.62%
Clutha	370,000	283.10	296.04	12.94	4.57%
Dunedin – PT	590,000	410.54	436.41	25.87	6.30%
Dunedin – Other	590,000	263.49	272.77	9.28	3.52%
Queenstown – PT	1,475,000*	635.00	642.18	7.18	1.13%
Queenstown – Other	1,475,000*	482.37	493.61	11.24	2.33%
Waitaki – PT (Palmerston)	425,000**	359.13	381.33	22.20	6.18%
Waitaki – Other	430,000	258.93	263.39	4.46	1.72%

* Queenstown Lakes District has updated valuations. The new median is \$1,470,000. The previous median was \$1,250,000 and the new valuation for the assessment used for the Queenstown – PT example now has a CV of \$1,475,000. This amount has also been used for the Queenstown – Other example and this assessment had a previous median of \$1,270,000.

** Waitaki – PT example uses \$425,000 CV as there is no assessment paying Dunedin PT rates with a \$430,000 CV.

- [28] The impact of the final rates increase by district is shown in the table below:

District	Average CV	Rates AP 2024/25 (Incl GST)	Draft AP 2025/26 (Incl GST)	Increase \$	Increase %
Central Otago	1,217,250	6,965,200	7,190,944	225,744	3.2%
Clutha	914,205	5,881,275	6,014,057	132,781	2.3%
Dunedin – PT	735,910	27,336,030	29,230,240	1,894,211	6.9%
Dunedin – Other	1,356,320	5,044,884	5,300,309	255,425	5.1%
Dunedin	793,659	32,380,914	34,530,549	2,149,636	6.6%
Queenstown – PT	2,369,814	16,315,427	17,026,390	710,963	4.4%
Queenstown – Other	2,179,068	8,789,857	9,488,655	698,799	8.0%
Queenstown	2,286,555	25,105,284	26,515,045	1,409,761	5.6%
Waitaki – PT (Palmerston)	352,240	207,174	222,086	14,912	7.2%
Waitaki – Other	763,855	4,086,458	4,264,001	177,543	4.3%
Waitaki	740,536	4,293,632	4,486,087	192,455	4.5%
Total Region	1,224,890	74,626,304	78,736,681	4,110,377	5.5%

Balancing the Budget

- [29] Under section 100(1) of the Local Government Act 2002 Council must ensure that each year's projected operating revenues are set at a level sufficient to meet that year's projected operating expenditure.
- [30] Under section 100(2) Council may set projected revenues at a different level from that required by subsection (1) if Council resolves that it is financially prudent to do so, having regard to:
- a. the estimated expenses of achieving and maintaining the predicted levels of service provision set out in the long-term plan, including the estimated expenses associated with maintaining the service capacity and integrity of assets throughout their useful life; and
 - b. the projected revenue available to fund the estimated expenses associated with maintaining the service capacity and integrity of assets throughout their useful life; and
 - c. the equitable allocation of responsibility for funding the provision and maintenance of assets and facilities throughout their useful life; and
 - d. the funding and financial policies adopted under section 102.
- [31] The surplus in the Annual Plan 2025-26 is minor at \$730,000 which is 0.5% of the total operating expenditure.
- [32] This surplus includes rating in the 2025-26 to repay historic public transport deficits and an estimated gain on sale from the sale of Stafford Steet. This is offsetting reserve funding some 2025-26 operating expenditure including the establishment of the large-scale environmental fund, LWRP costs (deferred from 2024-25), new bus services in Queenstown and implementation costs for IRIS NextGen.

Estimated Impact on 2026-27 (Year 3 of the LTP)

- [33] Decreasing rates in 2025-26 by increasing the amount of reserve funding will have a flow on impact into the following 2026-26 year assuming those reserve funded costs continue and are rate funded in year 3.
- [34] The Annual Plan 2025-26 process has focused on year 2 only and year 3 budgets have not yet been reviewed and revised but a high-level estimate of the impact on year 3 rates has been calculated below.
- [35] The LTP assumed a rates increases of 13.8% in 2025-26 (year 2) and 8.7% in 2026-27 (year 3). With the actual rates increase now reducing to 5.5% the total rates amount in year 2 reduces to \$68.467 million. Rates were estimated to rise by \$6.446 million in year 3 of the LTP. This will now increase by \$2.7 million if the large-scale environmental fund and LWRP costs are rate funded. That would result in a rates increase in year 3 of \$9.146 million which is 13.4%.
- [36] Note this is simple high-level estimate that only adjusts for two of the reserve funded amounts in 2025-26. Other costs estimated in year 3 of the LTP will need to be reviewed to determine if the underlying increase assumed in year 3 can be reduced. A full review of the year 3 estimates will be undertaken and presented to Council as part of the 2026-27 Annual Plan process.

Levels of Service

[37] The attached Annual Plan contains service measures and targets for Council's activities, which remain largely the same as the LTP, although some refinements were made through the Annual Plan process. In February Council approved some changes and these were included in the draft Annual plan for consultation with the community. There have been some additional refinements since this time.

[38] Changes to service measures and targets reflect ongoing staff efforts to improve the wording to make targets more measurable, enabling more effective and accurate reporting, providing more realistic targets or to reflect revised timing of planned work. Importantly these changes do not diminish the quantum, quality or intent of the measures and targets included in the consulted version.

[39] There are nine additional proposed changes which were not included in the February report. These are outlined in the table 4:

Report. These are outlined in the table below.

Additional refinement of Annual Plan 2025-26 service measures and targets			
Activity: Regional Planning			
Service Statements	Service Measures	Targets	What has changed:
Support Otago’s councils and communities to manage environmentally sustainable urban growth.	Support integrated and well managed urban growth across Otago.	RPS change to insert maps of highly productive land ready for notification by 17 October 2025.	Targets deleted due to reform impacting the requirements for HPL work to be completed.
		Hearing Panel for RPS change appointed by 30 June 2026.	
Activity: Land and Water			
Service Statements	Service Measures	Targets	What has changed:
Provide a robust and integrated environmental planning framework for Otago’s land, water and coast resources.	Complete the Land and Water Regional Plan (LWRP).	Draft LWRP ready for Council decision on notification.	Second target removed due to government direction.
	Initiate plan changes to the Land and Water Regional Plan.	No target	Measure and target removed due to government direction.
Activity: Air			
Service Statement	Service Measure	Target	What has changed
Provide a robust and integrated environmental planning framework for Otago’s Air resource.	Complete the review of the Regional Plan - Air	Complete a public engagement campaign and pre-notification consultation on draft Regional Plan – Air.	Target adjusted to reflect Council’s 19 March 2025 decision.

Activity: Flood Protection, Drainage and River Management			
Service Statement	Service Measure	Target	What has changed
Respond efficiently and effectively to community issues relating to rivers, schemes and flood events.	Percentage of identified and reported issues that have been investigated and appropriate action determined and communicated to affected landholders within 20 working days.	98%	Target reduced from 100% to account for the high volume of responses required after flood events.
Activity: Transport			
Service Statements	Service Measures	Targets	What has changed:
Provide efficient, reliable and accessible public transport services that meet community needs.	Percentage of Whakatipu scheduled services delivered.	>95%	Targets adjusted from draft AP target of >99% to realign with LTP target levels.
	Percentage of Dunedin scheduled services delivered.	>95%	
	Percentage of users who are satisfied with the provision of timetable and services information.	Maintain or increase 3-yr rolling average >=90%	Measure and target removed as this aspect is covered by overall satisfaction survey.

Fees and charges

[40] The schedule of fees and charges are provided in the Annual Plan 2022-23, and in attachment 2, these remain unchanged from those presented in the consultation proposal.

OPTIONS

[41] There are no options presented. This is not an options report but rather presents the final deliverable of a decision-making process that has reviewed year two of the adopted Long-term Plan 2024-34. This process was initiated with the Otago Regional Council elected representatives in September 2024 and has included multiple reports and workshop presentations to reach this point.

CONSIDERATIONS

Strategic Framework and Policy Considerations

[42] No further considerations at this final stage of the process.

[43] The delivery of Annual Plan work programmes gives effect to Council's strategic directions and makes progress towards achieving strategic goals.

Financial Considerations

- [44] The financial considerations related to this Annual Plan process are covered in the body of this report.

Significance and Engagement

- [45] There are no further considerations for Council at this final stage of the process. The assumption at this stage of the process is that no change will be introduced to the forecast estimates and associated work programme that might be deemed significant.
- [46] The Council agreed that the draft financial estimates and work programme as consulted contained no significant change to its Long-Term Plan 2024-34.

Legislative and Risk Considerations

- [47] This report enables the Council to meet core planning and decision-making requirements under the Local Government Act 2002. The final legislative process consideration is to meet the 30 June 2025 deadline for adopting this Annual Plan.
- [48] The risk of a material mis-statement within the Annual Plan has been managed via internal process.
- [49] Risk associated with service delivery has been discussed with Councillors through the Annual Plan process. The quarterly activity and financial reporting to Council and corporate risk reporting to the Audit Risk sub-committee provides a means of monitoring delivery risk.
- [50] External audit of the Annual Plan 2025-26 is not required. Council agreed at its 19 February 2025 meeting that the proposed adjustments to the Long-Term Plan 2024-2034, do not represent a significant or material change.
- [51] Central Government reform may impact how ORC's work programmes are delivered in the future. The impacts are not known as this Annual Plan is adopted, but some service level measures and targets have been adjusted to reflect this uncertainty. Staff will continue to communicate with councillors as changes arise.

Climate Change Considerations

- [52] The annual plan includes climate change work programmes and projects as well as associated budgets across various Council activities such as Natural Hazards, Flood protection, Biodiversity and Engagement.
- [53] The Annual Plan supports implementation of our strategic directions and the climate related goals which it articulates.
- [54] There are no specific considerations other than feedback to the Annual Plan process which includes comments and requests about the Council's climate change programme and approach.

Communications Considerations

- [55] Council sought community feedback on the draft Annual Plan 2025-26. As with previous corporate planning processes that have included community consultation, letters will be sent to submitters thanking them for participating and outlining the decisions of Council.

NEXT STEPS

[56] The next steps include:

- a) Approval of the Council Rating Resolution at this Council meeting.
- b) Implementation of the Annual Plan 2025-26 from 1 July 2025.
- c) Staff to respond to submitters regarding the Council's final decisions. Summarised Annual Plan information will also be made available on the Council's website.
- d) Quarterly reporting on progress against the non-financial service levels and finances will commence from September 2025.

ATTACHMENTS

- 1. Annual Plan 2025 -2026 for Council adoption [**10.2.1** - 100 pages]
- 2. Schedule of Fees and Charges for 2025-26 [**10.2.2** - 7 pages]



Otago
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Annual Plan 2025-2026

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Contents

- Chairperson's Foreword..... 2
- Overview..... 3
 - Why does this document matter?..... 4
 - What has changed since the Long-Term Plan?..... 5
 - Community Feedback..... 6
 - Finalising the Annual Plan..... 7
 - Financial Summary..... 8
 - Strategic Directions 2024-2034..... 9
 - Partnering with Mana Whenua..... 11
- What we will deliver..... 12
 - Regional Leadership..... 13
 - Environment..... 25
 - Climate Change and Resilience..... 37
 - Transport..... 48
 - Council Organisation..... 54
- Forecast Financial Information..... 57
 - Overview..... 58
 - Planning Assumptions..... 59
 - Financial Statements..... 68
 - Summary of Accounting Policies..... 77
 - Significant Accounting Policies..... 78
 - Schedule of Fees and Charges..... 91

Chairperson's Foreword

Building a Stronger Future for Otago

Otago Regional Council's vision is for **Otago's environment and communities to be healthy and connected *ki uta ki tai*—from the mountains to the sea**. This guides our direction and shapes the work planned for the year ahead.

In developing the Annual Plan for 2025/26, we focused on finding efficiencies in work programmes to deliver value for money, also increasing Port Otago's financial contribution to help keep rates costs down and make the most of this regional asset. At the same time, we focused on continuing the vital work that supports Otago's people and our environment which underpins thriving communities and people's livelihoods.

A key highlight this year is a new \$2 million environmental fund. Created with community input, it supports large-scale projects that deliver lasting environmental benefits. It taps into local knowledge and community drive. In its first year, the fund is fully paid for from Council reserves—not rates.

Improving bus services is still a priority. Queenstown will see upgrades with Government co-funding, but planned improvements for Dunedin did not receive funding, so current services will remain unchanged there. A business case to assess Wanaka public transport options attracted strong public support and will go ahead. Some regional upgrades will not happen due to co-funding gaps, but we're committed to finding ways to improve connectivity options for Oamaru, Balclutha and Central Otago. Government targets for increased 'private share' revenue will mean fare increases are introduced during the year to help meet the overall cost of public transport.

Our essential services will continue, including civil defence, biosecurity, water and air quality monitoring and regulation, navigational safety, and 24-hour pollution response.

Addressing climate change also remains central to our work. We're advancing natural hazard adaptation programmes in South Dunedin, the Clutha Delta and Head of Lake Whakatipu, alongside projects to strengthen our flood protection schemes.

We're putting a strong focus on Integrated Catchment Management across the region. Last year, we supported the Catlins community to create a Catchment Action Plan. This year, we're working with the Upper Lakes community and mana whenua to develop a plan for the Clutha River headwaters and lakes area. These plans empower local people to plan for and achieve, outcomes that reflect local identity and aspirations.

Thank you to everyone who took time to have their say and helped to shape the Annual Plan and our goals and priorities for the year ahead.



Gretchen Robertson
Chairperson, Otago Regional Council



Overview

Overview

Cardrona River

ANNUAL PLAN 2025-2026

3

Overview

Why does this document matter?

Annual and Long-Term Plans, outline the services Otago Regional Council (ORC) intends to provide, how much it will cost to deliver those services and where the money will come from to pay for those services. ORC's Long-Term Plan 2024-2034 (LTP) was publicly consulted and put in place in 2024, it sets out Council's activities, work programmes and financial needs for the ensuing three years and, in less detail, over 10 years.

The Annual Plan 2025-2026 covers the second year of the LTP and provides a one-year snapshot of the council's intended work, including financial information like costs, funding, and rates. It details how our plans are progressing and reflects some changes to the planned work programmes, while ensuring Council stays aligned to its long-term goals.

ORC's Strategic Directions document provides broad goals that encompass all Council activity and helps to ensure goals are aligned with where council puts its efforts. Each Annual Plan process enables us to adapt and change our Long-Term Plan in response to community needs and central government changes. The Annual Plan is important for letting the community know if there are changes the Council is proposing. This enables the opportunity for communities to give councillors feedback about any changes.

In developing Council's Annual and Long-Term Plans elected regional councillors consider information and advice, including legislation that sets our roles and conduct, infrastructure plans such as flood, drainage and river schemes, natural hazards and climate change initiatives, transport plans and bus services, as well as a range of planning updates which are required to be completed.



What has changed since the Long-Term Plan?

In the Long-Term Plan, a rates increase of 13.8% was forecast for year two, which is the 2025-2026 financial year. The planned rates increase was to help fund an expanded Council work programme. Through the Annual Plan process, Council reviewed the planned work, financial forecasts, assumptions and considered community feedback. The revised Annual Plan still includes an expanded work programme, although some work has been adjusted, revised or put on hold. The following pages outline the original LTP year two work programme, as well as the adjustments made in the draft Annual Plan, which was consulted with the community, and the final revisions. The Annual Plan adopted by Council in June 2025, provides for a work programme that totals \$140 million and represents a revised, and lower, overall rates increase of 5.5% (\$3.57 million).

The original LTP work programme for year two included:

- New scaled-up environmental funding
- Passenger transport service improvements for Dunedin and Queenstown
- Increased spending on river management and environmental implementation projects
- A range of governance and democracy related work including implementing the Climate Change Strategy
- Organisational structural change
- Increased insurance costs
- New IT licences and higher depreciation costs for replacing critical hardware and software
- Higher spending on land and water science including monitoring
- Provision for inflation across all operational expenditure

Through the Annual Plan process Council reviewed the LTP spending and work programmes for year two, and subsequently decided to consult with the community on a proposed rates increase of 7.8% (\$3.9 million), rather than the 13.8% (\$9 million) indicated in the LTP. The smaller increase in rates was a result of considering Council direction and planned work programmes, and balancing this with the important need to reduce the rating impact on people in Otago, whilst still delivering for communities and the environment.

A key factor that assisted with the goal of reducing the rating impact for 2025-2026 was a reduction in Government co-funding for public transport. This meant that some planned public transport service improvements for Dunedin, the Queenstown ferry service improvements, regional public transport trials and a Wānaka/Upper Clutha business case were removed from the work programmes. Other changes impacting the lesser, but still rising, proposed rate take included:

- Refinement of river management plans - aspects of the programme were adjusted to reflect delivery capacity.
- Reducing our operational programme.
- Pausing work to identify new priority environmental implementation projects, reflecting the new environmental implementation funding.

All this meant that planned spending was proposed to be reduced by \$6 million, which is 4.4% of total planned operational expenditure for the Annual Plan year. This also reflected greater optimism that the impacts of inflation would be reduced. Additionally, the dividend received from Port Otago's was forecast to rise by \$2 million, from \$18 million to \$20 million for the 2025-2026 financial year, which reduced the amount needed from the general rate, and therefore benefited all ratepayers across the region.

Overview

Community Feedback

An integral part of Council's Annual and Long-Term Planning processes is listening to the community. The plan aims to strike a balance between Council's legislative responsibilities, the services that the people of Otago want Council to deliver, alongside the willingness and ability to pay.

As the draft Annual Plan largely reflected the work programme for Year 2 of the LTP, Council was not required to formally consult. However, Council decided in February to seek community feedback on the draft Plan. Community engagement ran for four weeks, from 17 March - 15 April 2025 and the engagement material included summaries of the proposed rating changes, public transport changes, the new large-scale environmental fund, changes to flood protection and drainage work programmes, and links to information on proposed changes to fees and charges.

The Annual Plan submission form did not have specific proposals and options for the community but asked for general feedback on the draft plan, with a specific question relating to the proposed changes to the schedule of fees and charges.

Submission overview:

- 51 submissions were received;
- 17 were made on behalf of an organisation or group;
- 9 were received via email, the remainder being lodged online, there were no hard-copy submissions received;
- 11 submitters spoke to their submissions at the hearings, held on 27 May 2025

Geographic spread: Submissions were received from across the region and the geographic spread of submitters was broadly reflective of Otago's population spread across territorial authorities with 54% of submissions coming from Dunedin, 19% from Queenstown Lakes, 13% from Waitaki, 8% from Clutha and 6% from Central Otago.

Submission sentiment: As in other years, the submissions we received on the draft Annual Plan covered a range of themes and reflected a variety of sentiment. Some submitters were in support of the planned programmes, draft budgets and rates, while others wanted ORC to do more. There were some who wanted ORC to reduce some work programmes, reduce spend and lower the rating impact.

Submission topics: A range of topics were covered in submissions. The key topics referenced in submissions included:

- Transport - more than half of all submissions provided feedback on Transport programmes or funding, with the majority asking Council to provide additional services or infrastructure, particularly in relation to cycle trails, the Wānaka/Upper Clutha trial and an Ōamaru-Dunedin service.
- New large-scale environmental fund - the majority of those who addressed this topic expressed support for the fund.
- Rates or expenditure - the majority of submissions that mentioned rates or Council spending, requested reductions; some asked for efficiencies or suggested different approaches to funding.
- Feedback on other topics included the Biodiversity Strategy, climate change, flood protection and river management, pollution response and catchment plans.

Service and funding requests: Submissions included a range of requests. Some of the requests for additional levels of service, are able to be addressed within the planned programmes and resourcing, while other requests would require additional resourcing if they were to be progressed. Council deliberated on these at its Finance committee meeting on 27-29 May 2025.

Fees and charges: 16 submissions included feedback on the proposed changes to the schedule of fees and charges, with a range of perspectives expressed. However, in a number of the submissions it was unclear if the comments were specifically related to the schedule of fees and charges, or to funding more generally. Council are accepting the proposed changes to the schedule of fees and charges.

Finalising the Annual Plan

To conclude the earlier funding discussions, in May Council reviewed community feedback on the draft Annual Plan and looked again at the revised budgets and work programmes for 2025-2026, while also considering the forecast financial position of the current year. During the Annual Plan deliberations on 27-28 May 2025 the Finance Committee made decisions which resulted in an overall rates increase of 5.5% (\$3.57 million) for the Annual Plan 2025-2026, compared to the current year. This is lower than the 7.8% rates increase proposed in the draft Annual Plan and lower than the forecast 13.8% increase in the LTP. The reduction in rates is due to some key decisions made at the Annual Plan deliberations. These changes include:

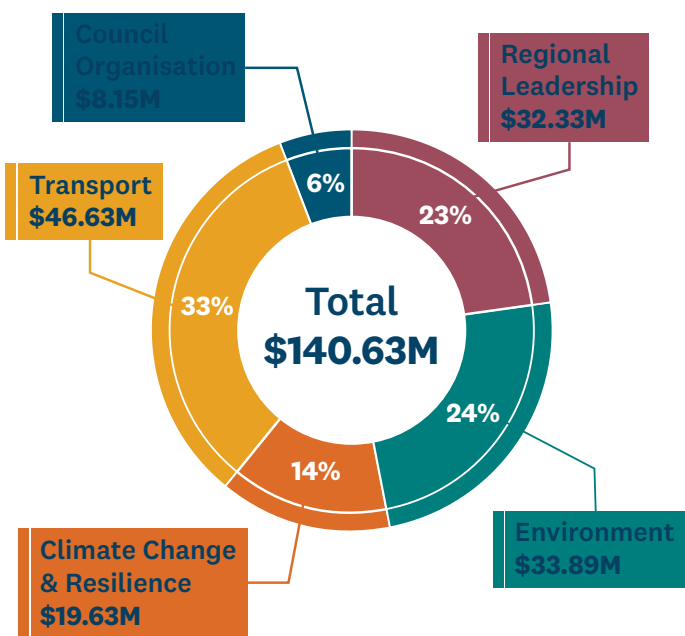
- **Reduced rates requirement for land and water planning:** \$700,000 of the rates collected for Land and Water Regional Plan (LWRP) work was not spent in 2024-2025. This was because Council paused work and is now waiting on government direction before picking up this work again. This means that the unspent funds can be carried over to the new financial year, which will reduce the associated rating requirement for this work in 2025-2026.
- **Increased public transport costs:** Some additional Public Transport bus contract costs and consumers price index (CPI) bus indexation costs were not included in the LTP. These costs relate to additional services in both Dunedin and Queenstown. The increased costs of the public transport services are \$3.2 million for Dunedin and \$1.2 million for Queenstown in 2025-2026. Council decided that for Dunedin it would rate to cover the additional costs and in Queenstown it would carry over unspent operating transport funds from the current year. Additionally Council requested staff to prepare a work plan that addresses any Health and Safety issues arising from the previously completed bus stop audit for delivery in the 2025-2026 year.
- **Reduced regional planning expenditure:** Due to progress made in the Regional Policy Statement and effective mediation rather than legal processes, Council has been able to reduce the Regional Planning budget and associated rates by \$500,000.
- **Wānaka/Upper Clutha public transport business case:** In response to community feedback on the draft Annual Plan, the Council agreed to reinstate the Wānaka/Upper Clutha public transport business case, which had been planned in the LTP. There is no government co-funding for this work, so it will be fully funded from general rates at a cost of \$250,000.
- **Large-scale environmental fund:** Council reiterated a commitment to introducing a large scale environmental fund and resolved to allocate up to \$2 million to the new large-scale environmental fund, with the final amount to be determined through the fund allocation process. Additionally, Council decided to fund this initiative from its reserves for 2025-2026, rather than rating to cover the costs in the first year.

The changes outlined above have resulted in a total operating expenditure of \$140.63 million for 2025-2026, with an associated rating requirement of \$68.47 million. This Annual Plan document summarises Council's intent and outlines the key work programmes and projects that Council will deliver for Otago over the coming year, it identifies the costs of Council's activities and how these are funded.

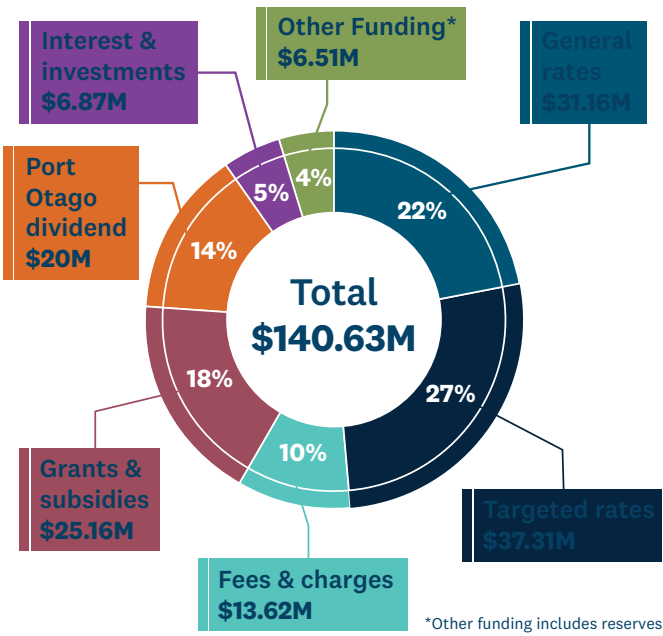
Financial Summary

This Annual Plan includes a total operating expenditure of \$140.63 million and capital expenditure of \$20.56 million for 2025-2026. Council uses a range of mechanisms to fund its important work. Less than half of ORC’s funding comes from rates; the rest comes from a range of sources including fees and charges, bus fares, grants, reserves, Port Otago Ltd dividends, interest and investments.

Cost of ORC work



How we fund our work



The table below show the operating costs related to each group of activities and the associated funding sources.

Activity group	Funding source (\$'000s)							Total
	General rates	Targeted rates	Fees & charges	Grants & subsidies	Port Otago dividend	Interest & investments	Other funding*	
Regional Leadership	26,240	883	4,643	77	0	0	488	32,331
Environment	17,744	10,557	0	2,830	0	0	2,759	33,891
Climate Change & Resilience	4,349	11,628	337	1,753	0	0	1,561	19,627
Transport	4,358	14,237	8,642	20,503	0	0	-1,104	46,637
Council Organisation	-21,531	0	0	0	20,000	6,871	2,808	8,148
TOTAL FUNDING	31,160	37,306	13,621	25,162	20,000	6,871	6,513	140,634

*Other funding includes reserves

There are different kinds of rates - general rates fund work that provides benefits across the whole region and is paid by every ratepayer. Targeted rates can be region-wide charges, such as the emergency management rate, or can be applied to specific properties which benefit from the activity. The overall rates increase for 2025-2026 is 5.5% (\$3.57 million); however, the spread of rates varies depending on the types of rates that are applicable to each area and across individual properties. The actual rates for each property will vary depending on the location and services provided.

More detailed information on the finance and funding implications of this Annual Plan can be found in the financial section of this document including financial statements, accounting polices, assumptions, and the schedule of fees and charges for 2025-2026.

Strategic Directions 2024-2034

ORC's Strategic Directions 2024-2034 will continue to inform our decision-making over this three year LTP planning review cycle and a summary of key elements is provided below.

The diagram outlines the focus areas and the outcomes we want to achieve for each focus area.



Overview

Strategic Goals

Our ambition is to make significant progress towards realising our vision over the next ten years by aligning our work programmes with six focus areas. We have set goals that link to the outcome for each focus area, which allows us to arrange and prioritise our work to ensure our aspirations are fulfilled.

The goals we have set for each focus area are as follows:

Partnership

- 1 Te ao Māori concepts of intergenerationally and deeply connected systems are incorporated throughout Council's work programmes.
- 2 Mātauraka Māori and the principle of te mana o te wai are incorporated into our environmental planning, management, and decision making.
- 3 We always go above and beyond our statutory responsibilities (as prescribed in local government and treaty settlement legislation) to support the intention of the Crown to uphold the principles of the Treaty of Waitangi.

Communities

- 1 Our communities trust us, and they are satisfied with us and the outcomes that we are delivering.
- 2 Our communities are supported and empowered to achieve better environmental outcomes.
- 3 The social, cultural, economic, and environmental wellbeing of Otago is consistently improving.

Environment

- 1 Ecosystems are healthy, our water and air are clean, and biodiversity loss is arrested across the region.
- 2 We predict and address emerging environmental issues before they arise.
- 3 Our regional plans are effective at ensuring our resources are managed sustainably within biophysical limits in a planned and considered way.

Resilience

- 1 Plans are in place to ensure that the region's most vulnerable communities (geographic and demographic) and ecosystems are resilient in the face of natural hazards.
- 2 Our infrastructure is designed and built to accommodate variability and uncertainty associated with changing weather patterns and sea level rise.
- 3 Our Regional Policy Statement and regional plans control development in areas that are vulnerable to natural hazards.

Climate

- 1 The carbon footprint of our organisation is reduced in line with our Climate Change Strategy, and we are supporting and collaborating with others to do the same.
- 2 Climate change mitigation and adaptation are key considerations in all our decisions.
- 3 Our agriculture and horticulture systems are more climate resilient in the face of changing weather patterns, water availability and consumer choice.

Transport

- 1 Congestion is reduced and connection is increased throughout the region.
- 2 Carbon emissions are reduced and air quality is improved across the region, supported by our efficient and affordable public transport services.
- 3 Active transport is the preferred mode for short journeys in urban areas.

Partnering with Mana Whenua

What does this mean?

The Otago Regional Council values our relationship with Te Rūnanga o Ngāi Tahu and our partnership with our Papatipu Rūnaka. We also continue to work collaboratively with our regional environmental entities to give effect to Te Tiriti o Waitangi and align with the strategic goals of ORC's partnership approach. These partnerships reflect our commitment to acknowledging and respecting the unique and enduring connection that iwi have with the land.

For the Otago Regional Council, legislative requirements represent the baseline. We strive to go beyond these statutory obligations to ensure meaningful engagement with iwi, upholding our commitment to Te Tiriti o Waitangi and the partnership it represents. This approach also acknowledges the significant value that engagement with Māori brings, particularly in the sharing of knowledge and wisdom as takata whenua.

Steps to achieve this

The Otago Regional Council has processes and initiatives in place that give effect to the principles and requirements outlined in national legislation. These support the participation of **Kāi Tahu** and **Papatipu Rūnaka** and contribute to building their capacity to engage meaningfully in regional decision-making.

Key partnership initiatives include:

- **Mana-to-Mana Governance Hui** - regular meetings between Kāi Tahu ki Otago Rūnaka, Ngāi Tahu ki Murihiku Representative and ORC Councillors to discuss shared governance priorities.
- **Iwi Representation in Governance** – we have mana whenua-appointed representative on our Environmental Strategy and Planning Committee, including one who serves as co-chair. Mana Whenua are also represented on the Community and Partnerships Committee.
- **Memorandum of Understanding and Protocol (2003)** – a foundational agreement between ORC, Te Rūnanga o Ngāi Tahu, and Kāi Tahu ki Otago that guides effective consultation and liaison.
- **Charter of Understanding (2016)** – formalises partnership with Te Ao Mārama Inc. and Southland Rūnaka, recognising shared interests across regional boundaries.
- **Collaborative Policy Development** – we maintain an ongoing partnership with Aukaha 1997 Ltd. (on behalf of Otago Rūnaka) and Te Ao Mārama Inc. (on behalf of the Murihiki Rūnaka) to ensure iwi perspectives are embedded in ORC's policy work, including the Land and Water Regional Plan.
- **Operational Support and Resourcing** – we maintain regular engagement at the staff level with both

Aukaha and Te Ao Mārama Inc, alongside our strategic partnership with mana whenua, to ensure Māori perspectives are embedded across key policy and planning processes.

Supporting and Embedding Te Tiriti Commitments

These initiatives are enabled through ORC's internal planning and resource, allocation, including:

- A dedicated Senior Advisor – Iwi Partnerships and Engagement to lead and coordinate iwi engagement and capacity building across the organisation.
- Implementation of recommendations from an independent Te Tiriti o Waitangi audit conducted by Te Kura Taka Pini.
- Ongoing, sustainable funding commitments to Aukaha Ltd. and Te Ao Mārama Inc. to support their capacity and long-term planning.
- Organisational development initiatives aimed at building cultural capability, deepening staff understanding of Te Ao Māori, and fostering more meaningful and authentic engagement with mana whenua.
- Alignment with ORC's Strategic Directions, which place partnership at the centre of achieving long-term environmental wellbeing and thriving Otago.
- The Whare Rūnaka project, currently underway in partnership with Aukaha Ltd., reflects our shared aspiration to embed mana whenua narratives, identity, and presence into the design of ORC's new Dunedin office.
- The recently updated ORC website, developed in partnership with Aukaha, reflects a strong partnership approach, ensuring the region's cultural narratives, iwi voices, and aspirations are visible, accessible, and meaningfully represented in how we present and share our work.



What we will deliver

What we will deliver

Our work is structured into five portfolios, which are aligned to our strategic directions.

We describe each portfolio in the following sections, including an overview of the work we do, why we do it and planned activities. We have also included levels of service, measures and targets for each portfolio, which we report against quarterly:

Regional Leadership

- Governance and Community Engagement
- Regional Planning
- Regulatory

Environment

- Land and Water
- Biodiversity and Biosecurity
- Air

Climate Change and Resilience

- Natural Hazards and Climate Change
- Flood Protection, Drainage and River Management
- Emergency Management

Transport

- Transport (including Regional Land Transport and Public Transport)

Council Organisation

- Internal Services
- Port Otago

Lauder



What we will deliver

Regional Leadership

Tunnel Beach, Ōtepoti Dunedin

What we will deliver

What Regional Leadership is

Our Regional Leadership work supports both the elected body of Council and the organisation in its role of decision making, partnering with mana whenua, and engaging with the community across the specific legislative responsibilities and other matters important to the Otago community.

We have three activities supporting our Regional Leadership work. They are:

- **Governance and Community Engagement**
- **Regional Planning**
- **Regulatory**

Group Revenue and Expenditure - Regional Leadership

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
13,343 Governance and Community Engagement	15,165	15,518
2,925 Regional Planning	3,066	2,640
12,568 Regulatory	13,846	14,173
28,836 Expenditure	32,077	32,331
23,346 General Rates	25,948	26,240
1,049 Targeted Rates	1,184	883
3,909 Fees & Charges	4,258	4,643
225 Grants	75	77
260 Other Income	260	10
47 Reserves	353	478
28,836 Revenue	32,077	32,331

Governance and Community Engagement

What we do

Connecting our communities in a timely and meaningful way to the work of the regional council is vital.

Through our elected representatives and communication and engagement activities, the many diverse voices from around Otago can be heard and be part of our decision-making process. In turn, we share the stories about our work, to raise awareness of the results of the investment Otago people make in us.

We aim to provide quality leadership that benefits our region and our work in this activity supports Councillors to carry out their duties.

The key programmes that make up this activity are:

- Communications and Marketing
- Governance and Democracy
- Engagement and Partnerships

Why we do it

Supporting governance, good decision-making, and connecting and engaging with our communities in a timely way are essential. Legislation also enshrines principles, powers, duties and functions that underpin this activity and the need for it.

Key work for year 2

The table below outlines key aspects of Council's work programme from 1 July 2025.

	PLANNED WORK
Existing work [no change]	<ul style="list-style-type: none">• Provide and promote governance processes and democratic decision-making by ensuring and supporting elected member committee structure and Council meetings.• Councillor and external appointees: Council/Committees/Mana to Mana/workshops Support; Regional meetings; Election 2025; Governance advice; projects; subscriptions.• Represent the diverse views and interest of the region in a fair and equitable way through engagement, communication and partnership.• Provide communications which enable the community to understand and participate in ORC's programmes and decision-making.• Supply communications and marketing materials for all consultations, and regional planning activity; Te Matapuna quarterly newsletter; Community Survey; Website.• Develop and deliver robust and effective corporate planning and reporting for accountability and transparency.
Revised work [change]	None to report.
Key Projects [one off]	Deliver 2025 Otago Regional Council local body election [as planned].

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Provide and promote governance processes and democratic decisions that are robust and transparent to the community.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Percentage of Council agendas that are publicly available two working days or more before a meeting.	100%	100%	100%	100%
Percentage of official information requests responded to within 20 working days of being logged.	100%	100%	100%	100%

LoS: Develop and deliver robust and effective corporate planning and reporting.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Deliver our Long-Term Plan, annual reviews of the LTP, and reporting of performance against plan as per the statutory requirements.	Annual Plan [Yr2] adopted by Council prior to 30 June 2025. Council financial and activity performance against the Year 3 LTP 2021-31 reported to Council by October 2024.	Annual Plan [Yr3 LTP] adopted by Council prior to 30 June 2026. Council financial and activity performance against the Year 1 LTP 2024-34 reported to Council by October 2025.	LTP 2027-37 adopted by Council prior to 30 June 2027 Council financial and activity performance against the Year 2 LTP 2024-34 reported to Council by October 2026.	Annual Plan adopted by Council prior to 30 June each year. Council financial and activity performance reported to Council by October each year.

LoS: Represent the diverse views and interest of the region in a fair and equitable way through engagement, communication and partnership.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Increase opportunities for engagement with diverse groups across Otago to lift awareness and understanding of the work of the regional council and seek feedback on performance.	Create and implement engagement plan and establish engagement data.	Maintain or increase numbers.	Maintain or increase numbers.	Maintain or increase numbers.

What we will deliver

LoS: Provide relevant, timely and accessible communications which enable the community to understand and participate in ORC's programmes and decision-making.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Biannual survey is conducted to understand and improve community awareness, perceptions and expectations of ORC.	Report against the action plan to Council by March 2025.	Survey and action plan completed March 2026.	Report against the action plan to Council by March 2027.	Survey and action plan completed by March 2028.
Customers express high levels of satisfaction with customer service provision.	Develop Customer Policy to determine satisfaction levels.	Meet or exceed satisfaction target of 85%.	Meet or exceed satisfaction target of 85%.	Meet or exceed satisfaction target of 85%.

What we will deliver

Regional Planning

What we do and why

This activity sets strategic direction for Otago's natural resources through a resource planning framework and programme that guides how people interact with the environment. In this framework, the Regional Policy Statement sits over the various regional plans, including water, land, air and the coast. They set out objectives, policies and rules for sustainably using natural and physical resources in Otago.

Other strategies and plans are also needed to support regulation, on-the-ground action, and community capacity building. Strategic direction and collaboration on important regional issues, such as climate change and community wellbeing, help support better outcomes for Otago communities.

Another important component of this activity is working with Otago's city and district councils on resource management and urban development. An integrated approach is sought via liaison with other functions, such as engineering, hazards management and transport planning.

The key programmes that make up this activity are:

- Regional planning programme (including the Regional Policy Statement)
- Urban development
- Response to policy issues
- Strategy (non-Resource Management Act)

Key work for year 2

The table below outlines key aspects of Council's work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Implement Regional Planning Programme: Regional Policy Statement;• Jointly delivering National Policy Statement (NPS) Urban Development, and National Policy Statement Highly Productive Land. Statutory requirements with Tier 2 district councils — via future development strategies.• Respond to national legislative processes to advocate for Otago.• Implementation, monitoring of the Regional Climate Change Strategy.
Revised work [change]	<ul style="list-style-type: none">• Notify Regional Plan Air in 2026.
Key Projects [one off]	<ul style="list-style-type: none">• Complete an Air Strategy.

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Support Otago's councils and communities to manage environmentally sustainable urban growth.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Support integrated and well managed urban growth across Otago.	Joint Queenstown Future Development Strategy completed by 30 June 2025.	No Target	Review of joint Future Development Strategies (Dunedin and Queenstown) completed by 30 June 2027.	No Target

LoS: Lead a regional approach to biodiversity management in collaboration with mana whenua, local councils, and other stakeholders.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Develop a regional biodiversity strategy and implement ORC actions.	Draft regional biodiversity strategy is made available for public consultation by 30 June 2025.	Regional biodiversity strategy is adopted by 30 June 2026.	ORC actions from the regional biodiversity strategy are implemented, and the effectiveness of the strategy is monitored and reported to Council annually.	ORC actions from the regional biodiversity strategy are implemented, the effectiveness of the strategy is monitored and reported to Council annually, and the strategy is reviewed every three years.

LoS: Lead a regional approach to climate change in collaboration with mana whenua, local councils, and other stakeholders.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Develop a Regional Climate Change Strategy and implement ORC actions.	ORC actions from the Regional Climate Change Strategy are implemented, and the effectiveness of the strategy is monitored and reported to Council annually.	ORC actions from the Regional Climate Change Strategy are implemented.	ORC actions from the Regional Climate Change Strategy are implemented.	ORC actions from the Regional Climate Change Strategy are implemented.
		The effectiveness of the strategy is monitored and reported to Council annually.	The effectiveness of the strategy is monitored and reported to Council annually.	The effectiveness of the strategy is monitored and reported to Council annually, and the strategy is reviewed every three years.

What we will deliver

LoS: Lead a regional approach to air quality improvement in collaboration with mana whenua, local councils, and other stakeholders

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Develop a Regional Air Quality Strategy and implement ORC actions.	Draft Regional Air Quality Strategy is made available for public consultation along with the revised Air Plan by 30 June 2025.	Draft Air Quality Strategy revised following public consultation by 30 June 2026.*	Regional Air Quality Strategy is adopted by June 2027.*	ORC actions from the Regional Air Quality Strategy are implemented, the effectiveness of the strategy is monitored and reported to Council annually, and the strategy is reviewed every three years.
*Targets have been revised for the Annual Plan 2025-2026.				



Regulatory

What we do and why

This activity ensures that ORC can fulfil its role as a regulatory authority supporting the sustainable management of water, land, air and the coast. We process resource consents, develop rules for how natural resources are used and managed, monitoring them and ensuring the rules are applied. We investigate activities that don't comply, providing services to ensure activities in Otago are consistent with both national and regional rules in the Resource Management Act (RMA).

As well as undertaking consent processing and monitoring compliance with consents, RMA and regional plans, ORC has an educational and awareness-raising role. The regulatory teams collaborate with Otago communities to increase knowledge and understanding of environmental matters.

We are also responsible for maritime activity and navigational safety on lakes, rivers and harbours and for the regulation of ports under the Maritime Transport Act. In Queenstown and Wānaka, navigational safety is delegated to the Queenstown- Lakes District Council. This work has a mix of achieving environmental (e.g. oil spill response) and 'people safety' (e.g. navigation) outcomes.

The key programmes that make up this activity are:

- Consent processing
- Compliance monitoring
- Incident response, investigation and enforcement
- Harbours and waterway management

Key work for year 2

The table below outlines key aspects of Council's planned work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Consent processing [cost recoverable]: Processing consents under regional plans and national regulations is a mandatory activity with mandatory timeframes.• Implementation of national regulations and regional plans - Implementing and providing regional context to national regulation and standards is a discretionary activity with discretionary timeframes.• Consent fund: Providing consent processing costs to community and catchment groups for environmental enhancement projects is a discretionary activity with discretionary levels of service and timeframes.• Incident response: Maintaining a 24/7 pollution hotline response to environmental complaints.• Supporting behaviour change and compliance education activities.• Investigations and enforcement: Investigating environmental incidents; taking appropriate enforcement action and legal proceedings, and investigating dam construction breaches.• Compliance monitoring - undertaking audits and compliance inspections for RMA consents, forestry and dairy activities and undertaking appropriate follow-ups to ensure compliance with conditions.
Revised work [change]	Realignment of existing capacity from Environmental Implementation to Regulatory.
Key Projects [one off]	IRIS Next Gen

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Provide effective, efficient and customer centric consenting processes under the Resource Management Act (RMA) 1991 to enable the lawful use of natural and physical resources.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Percentage of resource consents applications processed within Resource Management Act 1991 legislative timeframes.	≥ 98%	≥ 98%	≥ 98%	≥ 98%
Percentage of public enquiries for consent information responded to within 10 working days.	Maintain or increase Note: Year 1 establish a measurement baseline	98%	98%	98%

LoS: Provide effective and efficient compliance monitoring, investigations and enforcement services and take appropriate actions to ensure the lawful use of natural and physical resources.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Percentage of performance monitoring returns completed each year, as per the compliance audit and performance monitoring schedule targets*.	≥90%	≥90%	≥90%	≥90%
Percentage of programmed inspection/audits completed each year, as per the compliance audit and performance monitoring schedule targets*.	≥90%	≥90%	≥90%	≥90%
Percentage of significant non-compliance incidents identified where action is taken in accordance with Compliance policy**.	100%	100%	100%	100%

*Note: Compliance audit and performance monitoring schedule is presented and approved by Council each year.

**Note: Please click [here](#) for the Compliance plan 2023-2026.

What we will deliver

LoS: Provide effective and efficient environmental response services to pollution incidents or notifications of non-compliant activities.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Maintain 24-hour/7 day a week response for environmental incidents.	Pollution hotline staff available/ on call 24/7.	Pollution hotline staff available/ on call 24/7.	Pollution hotline staff available/ on call 24/7.	Pollution hotline staff available/ on call 24/7.
Maintain 20 appropriately trained responders for maritime oil pollution incidents.	20 responders attend 3 exercises per year.	20 responders attend 3 exercises per year.	20 responders attend 3 exercises per year.	20 responders attend 3 exercises per year.

LoS: Develop and maintain robust regulations and procedures to enable safe use and navigation of our region's ports, harbours, coastal areas and inland waterways.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Maintain compliance with Port and Harbour Marine Safety Code.	External review is completed and deemed to be code consistent.	Annual self review is completed by ORC and Port Otago Ltd (POL) and signed off by the chief executives.	Annual self review is completed by ORC and POL and signed off by the chief executives.	Annual self review is completed by ORC and POL and signed off by the chief executives.

LoS: Promote and encourage safe use of ports, harbours, coastal areas and inland waterways and take appropriate action in response to non-compliance and incidents.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
The safety campaign for recreational 'boaters' is delivered.	80% achieved	Develop and deliver a recreational boating engagement plan.*	Develop and deliver a recreational boating engagement plan.*	Develop and deliver a recreational boating engagement plan.*
*Targets have been revised for the Annual Plan 2025-2026.				

What we will deliver

Funding Impact Statement - Regional Leadership

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
Sources of Operating Funding			
23,346	General rates, uniform annual general charge, rates penalties	25,948	26,240
1,049	Targeted rates	1,184	883
225	Subsidies and grants for operating purposes	75	77
3,909	Fees and charges	4,258	4,643
0	Internal charges and overheads recovered	0	10
260	Local authorities fuel tax, fines, infringement fees and other receipts	260	0
28,789	Total Sources of Operating Funding (A)	31,724	31,853
Applications of Operating Funding			
22,272	Payments to staff and suppliers	24,070	24,585
0	Finance costs	0	0
6,428	Internal charges and overheads applied	7,851	7,610
5	Other operating funding applications	5	0
28,705	Total Applications of Operating Funding (B)	31,927	32,195
84	Surplus (deficit) of operating funding (A - B)	(202)	(342)
Sources of Capital Funding			
0	Subsidies and grants for capital expenditure	0	0
0	Development and financial contributions	0	0
0	Increase (decrease) in debt	0	0
0	Gross proceeds from sale of assets	0	0
0	Lump sum contributions	0	0
0	Other dedicated capital funding	0	0
0	Total Sources of Capital Funding (C)	0	0
Applications of Capital Funding			
0	Capital Expenditure - To meet additional demand	0	
175	Capital Expenditure - To improve level of service	54	0
38	Capital Expenditure - To replace existing assets	29	29
(130)	Increase / (Decrease) in reserves	(286)	(371)
0	Increase / (Decrease) in investments	0	0
84	Total Applications of Capital Funding (D)	(202)	(342)
(84)	Surplus / (Deficit) of Capital Funding (C - D)	202	342
0	Funding Balance ((A – B) + (C – D))	(0)	0



What we will deliver

Environment

Miromiro/Tōmōtiti

What we will deliver

What Environment is

Our environment portfolio is diverse and is aimed at supporting Otago to have a healthy environment, including thriving ecosystems and communities and flourishing biodiversity. It also encompasses both the completion and implementation of plans relating to Otago's natural environment (e.g. Land and Water Regional Plan, Regional Pest Plan, Biodiversity Strategy).

The following three activities underpin 'Environment':

- **Land and Water**
- **Biodiversity and Biosecurity**
- **Air**

Group Revenue and Expenditure - Environment

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
20,140 Land & Water	21,875	20,125
8,955 Biodiversity & Biosecurity	12,013	11,996
1,377 Air	1,792	1,769
30,472 Expenditure	35,680	33,891
17,003 General Rates	18,346	17,744
10,498 Targeted Rates	14,400	10,557
0 Fees & Charges	0	0
2,886 Grants	2,831	2,830
0 Other Income	0	0
85 Reserves	103	2,759
30,472 Revenue	35,680	33,891

Land and Water

What we do

Our role involves working with Otago communities to manage activities that impact on health and well-being of water bodies and freshwater ecosystems. To do this well, we need robust, integrated and consistent regional plans and strategies. We drafted a new Land and Water Plan (LWRP), with mana whenua Kāi Tahu. The intention of the plan was to give comprehensive direction for managing land and water resources in the region. However, further work on the LWRP has been paused as we await Government direction, this will ensure our plan is able to align with the new National Policy Statement on Freshwater Management, which the government is developing.

We also assess water quality and quantity through our network of monitoring sites across the region, and this data informs planning and future decision-making. Our water monitoring and science programmes have expanded to include monitoring estuaries, the coast, groundwater, biomonitoring, land-use and soil monitoring.

We collaborate with communities to protect Otago's water and land resources through education, engagement and action. Our implementation programme includes education and support for landowners and catchment groups, as well as involvement in community-led projects and remediation works.

The key programmes which make up this activity are:

- Land and Water Planning
- Land and Water Implementation
- Land and Water Science and Monitoring

Why we do it

Protecting our high-quality freshwater and improving degraded freshwater is a key community concern in the region. Although some parts of the region, such as the lakes, river and stream reaches are located at high elevations, typically they have good or excellent water quality. Other parts, such as urban or more intensively farmed catchments, often have poorer water quality. Specific catchments, or Freshwater Management Units, will have distinctive characteristics that create unique challenges, which require different solutions to improve water quality when it is degraded. Additionally, there is pressure on water allocation in some drier inland parts of the region.

ORC has a key role to play to ensure Otago's land, water and coast support healthy ecosystems, and community well-being.

- ORC has powers to control the use of water, land and the coast under the Resource Management Act 1991.
- ORC must engage with the region's communities and develop regulatory methods and non-regulatory responses to achieve these visions and objectives (National Policy Statement for Freshwater).
- It has the technical expertise and knowledge to advise on the region's environmental health, issues and risks, and to monitor water resources.

Importantly, water also plays a significant role in Kāi Tahu spiritual beliefs and cultural traditions. When the natural environment is strong and healthy, the people are strong and healthy and so too is their mana.

Key work for year 2

The table below outlines key aspects of Council's planned work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Land and Water Planning: Reviewing Coast Plan to notify proposed plan by 30 June 2028.• Freshwater Implementation: The consultation proposal to increase the level of funding support to community-based groups to improve water quality, support for best practice land use and regulatory change begins.

What we will deliver

	<ul style="list-style-type: none">• Environmental Monitoring: Implement environmental monitoring programmes for Land, freshwater resources and coastal environment; implement water quality monitoring network review;• Science: Annual and 'State of Environment' (SoE) reporting; Water allocation Reviews; Highly Allocated Catchment Assessments; Scientific advice and support for catchment management planning and environmental projects (ongoing).
Revised work [change]	<ul style="list-style-type: none">• Land and Water Planning: The LTP work programme for the Land and Water Regional Plan has been paused to reflect government legislation and direction to ORC on process, including revision of the National Policy Statement Freshwater Management.• Freshwater Implementation: Pause work on agreeing and implementing new site-specific collaborative projects for degraded water bodies [i.e. new projects in addition to the existing three projects of Lake Hayes, Tuakitoto, and Tomahawk Lagoon projects].
Key Projects [one off]	None to report

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Implement environmental monitoring programmes across the region which provide accurate, relevant and timely information to decision-makers and the Otago public.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Report the results of environmental monitoring for freshwater, land use, estuarine, and regional coastal environments.	Annual report for each of the four environments to Council prior to 30 June 2025. [4 reports = achieved]	Annual report for each of the four environments to Council prior to 30 June 2026. [4 reports = achieved]	Annual report for each of the four environments to Council prior to 30 June 2027. [4 reports = achieved]	Annual report for each of the four environments to Council prior to 30 June each year. [4 reports = achieved]

LoS: Provide a robust and integrated environmental planning framework for Otago’s land, water and coast resources.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Complete the Land and Water Regional Plan (LWRP).	Freshwater hearing panel nominations and required documents submitted to Chief Freshwater Commissioner by 30 June 2025.	Review the draft LWRP against new national direction to freshwater.*	No target*	Target TBC*

What we will deliver

Complete a review of the Regional Plan Coast.	No target	Issues and options papers developed and reported to Council by 30 June 2026.	No target	Draft Regional Plan Coast ready for Council decision on notification by 30 June 2028.*
*Targets have been revised for the Annual Plan 2025-2026.				

LoS: Promote and enable best practice land management for soil conservation, water quality preservation and the efficient use of water.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
ORC led and community/landowner supported workshops and events are delivered which promote best practice land management for soil conservation, water quality and/or the efficient use of water.	At least 12 ORC led workshops or events are delivered annually.	At least 12 ORC led workshops or events are delivered annually.	At least 12 ORC led workshops or events are delivered annually.	At least 12 ORC led workshops or events are delivered annually.

LoS: Partner with iwi and collaborate with communities and landowners to develop and implement projects which enhance water quality and indigenous biodiversity in selected degraded water bodies.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Site specific projects are developed for selected degraded waterbodies.	Project actions have been progressed as scheduled. Note: [>80% = achieved]	At least 80% of project actions are progressed as scheduled.	At least 80% of project actions are progressed as scheduled.	At least 80% of project actions are progressed as scheduled.

LoS: Develop and maintain an integrated catchment management programme that aligns with national directions and enables sustainable environmental management.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Catchment Action Plans give effect to the ICM programme and are developed in partnership with iwi and in collaboration with the community.	One Catchment Action Plan to be presented to Council for approval by 30 June 2025.	One Catchment Action Plan to be presented to Council for approval by 30 June 2026.	One Catchment Action Plan to be presented to Council for approval by 30 June 2027.	One Catchment Action Plan to be presented to Council for approval by 30 June each year.

What we will deliver

Biodiversity and Biosecurity

What we do

Biodiversity

Council's biodiversity work programme is growing and our monitoring programme is progressing. We are strengthening partnerships across the region and we encourage and empower communities to take local action through our ECO Fund.

Our biodiversity work programme incorporates:

- Collaboration and partnership
 - Support to community groups and partners for joint projects.
 - Joint Project delivery via support and advice to partners and community.
 - Administration and support associated with grant funding.
 - QEII covenant incentive and partnership funding.
 - OSPRI transition initiatives.
- Technical advice and management
 - Management plans for high biodiversity sites.
 - Education material.
 - Catchment and operational planning (to implement strategy).
- Science-based monitoring

Biosecurity

Our Regional Pest Management Plan 2019-2029 (RPMP) sets out the framework for how pest plants and animals will be managed in Otago. It is supported by our Biosecurity Strategy that looks at how we will work with organisations and communities to achieve the goals set out in the RPMP.

Our biosecurity work supports the control of prolific pests, such as feral rabbits. We do this by educating our communities, facilitating compliance through funding projects. Council also plays a lead role in facilitating government funding and overseeing projects such as wilding conifer removal and wallaby eradication.

The key programmes which make up this activity are:

- Biodiversity implementation
- Biodiversity monitoring
- Catchment planning and advice
- Biosecurity (pest management)

Why we do it

At a national level, the Te Mana o te Taiao — Aotearoa New Zealand Biodiversity Strategy 2020 articulated the urgency of addressing biodiversity decline in New Zealand, and the National Policy Statement for Indigenous Biodiversity 2023 identified a key role for regional government in leading collaboration and coordinating efforts.

Under the Biosecurity Act 1993, Otago's Regional Pest Management Plan identifies 51 species to be managed by land occupiers, with oversight from ORC.

There are many agencies and stakeholders across different land tenures involved in and/or with an interest in biodiversity in Otago. ORC has a remit across all of Otago to promote biodiversity protection and enhancement. It has a key role in facilitating regional collaboration, including both developing a monitoring approach and seeking to partner in projects and initiatives.

What we will deliver

Key work for year 2

The table below outlines key aspects of Council's work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Biosecurity: Deliver the Regional Pest Management Plan; review the plan with Council to confirm its timing; surveillance of biosecurity issues and threats; development and implementation of marine biosecurity programme; community programmes support and delivery: National programme delivery.• Biodiversity: EcoFund applications and administration; Partnership/Incentive Funding QEII; OSPRI transition; education materials; high biodiversity site management plans; mana whenua engagement.• Coordinate collaboration on biodiversity programmes and initiatives within the region• Science and monitoring: Advise on the review of the Biodiversity Strategy; Advise and support plan review consistent with the NPS-IB (Y2 onwards). Threatened species mapping; Scroll Plain Management Plan development; wetland delineation and mapping.• New large-scale environmental fund initiative (up to \$2 million to be allocated in 2025-2026).
Revised work [change]	None to report
Key Projects [one off]	<ul style="list-style-type: none">• Biodiversity science and monitoring: Develop and implement a regional indigenous biodiversity ecosystem monitoring programme consistent with the NPS-IB (underway and ongoing).

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Implement an indigenous biodiversity monitoring programme across the region which provides accurate, relevant and timely information to decision-makers and the Otago public.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Report the results of environmental monitoring for regional indigenous biodiversity ecosystems. <i>Note: monitoring programme reporting includes freshwater, inland and coastal wetland, coastal and terrestrial ecology.</i>	Annual report completed prior to 30 June 2025.	Annual report on monitoring programme completed and reported to Council on 30 June 2026.	Annual report on monitoring programme completed and reported to Council on 30 June 2027.	Annual report on monitoring programme completed and reported to Council on 30 June each year.
<i>Note: 4 reports = achieved; 3 reports = partially achieved; <3 reports = not achieved</i>				

What we will deliver

LoS: Collaborate with iwi, DOC and other key organisations through leading the Otago Biodiversity Forum and develop, coordinate and deliver a programme of actions to enhance indigenous biodiversity.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Biodiversity Forum-based joint projects to enhance indigenous biodiversity are developed.	New projects and associated milestones are developed and reported to Council and forum partners.	At least one new project is developed and implemented with biodiversity forum partners	At least one new project is developed and implemented with biodiversity forum partners	At least one new project is developed and implemented with biodiversity forum partners
Joint projects are implemented against milestones.	Project actions have been progressed as scheduled. [>80% = achieved]	At least 80% of project actions are progressed as scheduled.	At least 80% of project actions are progressed as scheduled.	At least 80% of project actions are progressed as scheduled.

LoS: Provide support and funding to selected initiatives and organisations across the region which deliver environmental outcomes that align with our strategic objectives.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Alignment between *initiatives and deliverables receiving Council funding, and Council's strategic biodiversity strategic objectives. * Initiatives and deliverables provided by non-council groups and organisations.	80% alignment [80-100% = achieved]	All environmental projects and initiatives are aligned to at least one of the Council's environmental strategic objectives.	All environmental projects and initiatives are aligned to at least one of the Council's environmental strategic objectives.	All environmental projects and initiatives are aligned to at least one of the Council's environmental strategic objectives.

LoS: Develop and deliver practices and programmes that give effect to the Regional Pest Management Plan.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Actions within the Biosecurity Operational Plan (BOP) are progressed.	90% of actions progressed within time frames specified.	80% of non-priority pest management actions are achieved.*	80% of non-priority pest management actions are achieved.*	80% of non-priority pest management actions are achieved.*
	100% of targets for priority pests are delivered.	100% of priority pest management actions are achieved.*	100% of priority pest management actions are achieved.*	100% of priority pest management actions are achieved.*
*Targets have been revised for the Annual Plan 2025-2026.				

What we will deliver

LoS: Ensure that ORC's externally funded biosecurity programmes (such as wilding conifers, wallabies and Check, Clean, Dry) are delivered as per the agreement.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Externally funded biosecurity projects/programmes are implemented as per their agreements.	90% of deliverables in the agreements with Central Government are progressing as scheduled.	90% of deliverables in the agreements with Central Government are progressing as scheduled.	90% of deliverables in the agreements with Central Government are progressing as scheduled.	90% of deliverables in the agreements with Central Government are progressing as scheduled.

LoS: Ensure that ORC's externally funded Freshwater programmes (such as Essential Freshwater Hill Country Erosion Funding) are delivered as per the agreement.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Externally funded freshwater projects/programmes are delivered as per their agreements.	90% of deliverables in the agreements with Central Government are progressing as scheduled.	90% of deliverables in the agreements with Central Government are progressing as scheduled.	90% of deliverables in the agreements with Central Government are progressing as scheduled.	90% of deliverables in the agreements with Central Government are progressing as scheduled.



What we will deliver

Air

What we do and why

Good air quality is necessary for health and wellbeing. We are responsible for making sure our region complies with the government’s National Environmental Standard for Air Quality 2004 and, under the Resource Management Act 1991, for controlling the discharge of contaminants into the air.

Meeting air quality standards is especially challenging in areas with extremely cold winter weather and temperature inversions. Otago’s air quality often degrades during winter when domestic heating emissions increase with cold and calm weather and inversion layers occur.

We monitor air quality at sites across Otago, including Milton, Mosgiel, Dunedin, Alexandra, Clyde, Cromwell and Arrowtown. These sites measure the concentration of particles in the air and capture a mixture of pollutants.

Key programmes which make up this activity are:

- Regional Plan - Air
- Air monitoring

Key works for year 2

The table below outlines key aspects of Council's planned work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Science and monitoring: Ambient Air Quality — Annual and State of the Environment air quality monitoring and reporting (annual and ongoing); Bespoke studies (ongoing); Advise air plan review and implementation (ongoing). Additional funding and FTE.• Installing monitoring sites/assets.• Work under the regional planning activity contributes to air quality and includes the Regional Plan - Air and Air Quality Strategy.
Revised work [change]	None to report
Key Projects [one off]	None to report

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Monitor Otago’s air quality and make accurate, relevant and timely information publicly available.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Implement regional air monitoring programme.	Annual report on monitoring programme completed and reported to Council.	Annual report on monitoring programme of previous calendar year completed and reported to Council. Note: 95% = achieved	Annual report on monitoring programme of previous calendar year completed and reported to Council.	Annual report on monitoring programme of previous calendar year completed and reported to Council.

LoS: Provide a robust and integrated environmental planning framework for Otago’s air resource.

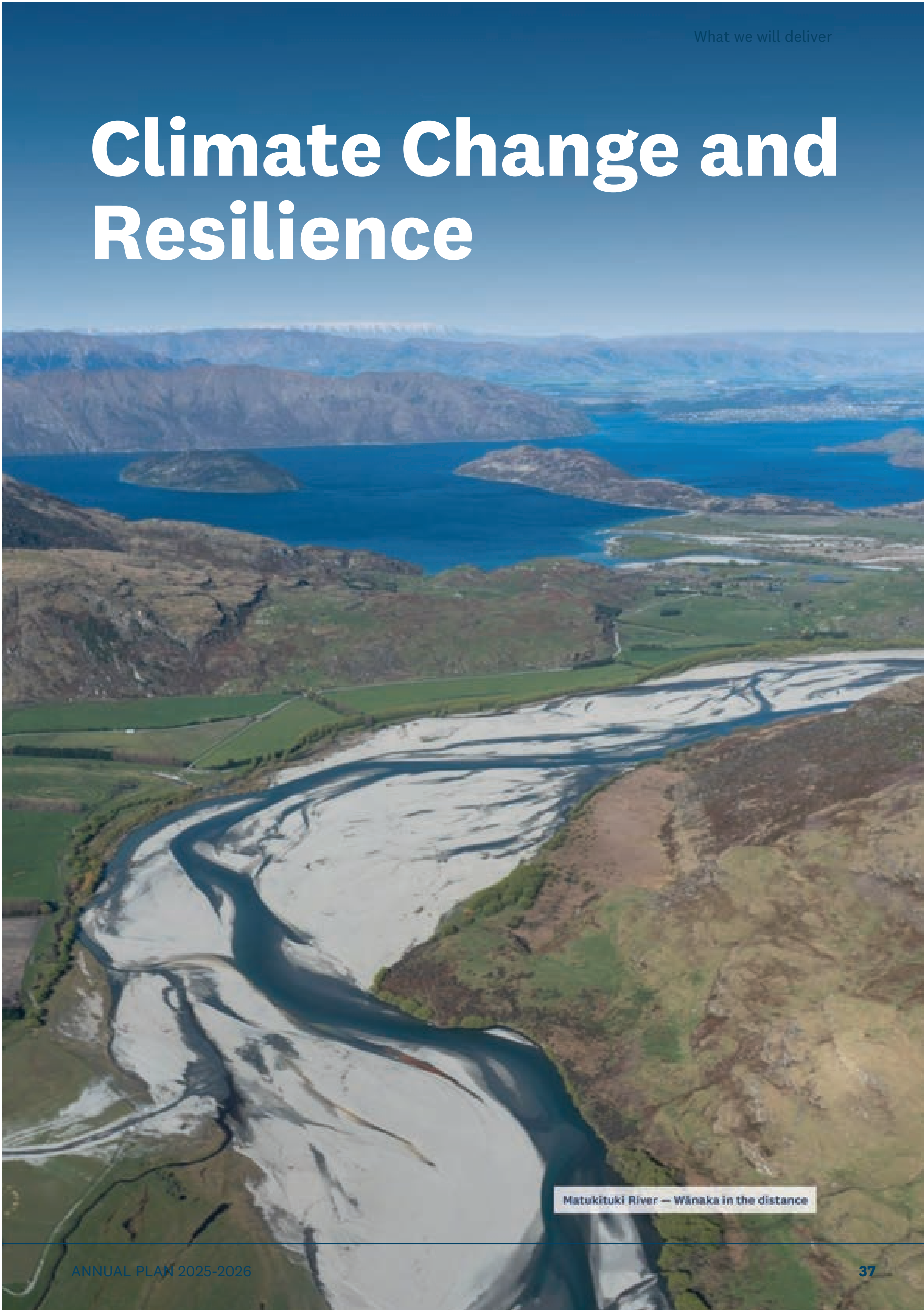
PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Complete the review of the Regional Plan - Air	Council approves Regional Plan - Air for notification by 30 June 2025.	Complete a public engagement campaign and pre-notification consultation on draft Regional Plan – Air.*	No target*	Target TBC*.
*Targets have been revised for the Annual Plan 2025-2026.				



What we will deliver

Funding Impact Statement - Environment

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
Sources of Operating Funding			
17,003	General rates, uniform annual general charge, rates penalties	18,346	17,744
10,498	Targeted rates	14,400	10,557
2,886	Subsidies and grants for operating purposes	2,831	2,830
0	Fees and charges	0	0
0	Internal charges and overheads recovered	0	0
0	Local authorities fuel tax, fines, infringement fees and other receipts	0	0
30,387	Total Sources of Operating Funding (A)	35,577	31,131
Applications of Operating Funding			
24,957	Payments to staff and suppliers	28,991	27,825
0	Finance costs	0	0
5,123	Internal charges and overheads applied	6,237	5,624
0	Other operating funding applications	0	0
30,081	Total Applications of Operating Funding (B)	35,229	33,449
306	Surplus (deficit) of operating funding (A - B)	348	(2,318)
Sources of Capital Funding			
0	Subsidies and grants for capital expenditure	0	0
0	Development and financial contributions	0	0
0	Increase (decrease) in debt	0	0
0	Gross proceeds from sale of assets	0	0
0	Lump sum contributions	0	0
0	Other dedicated capital funding	0	0
0	Total Sources of Capital Funding (C)	0	0
Applications of Capital Funding			
0	Capital Expenditure - To meet additional demand	0	
355	Capital Expenditure - To improve level of service	519	414
425	Capital Expenditure - To replace existing assets	436	434
(474)	Increase / (Decrease) in reserves	(607)	(3,166)
0	Increase / (Decrease) in investments	0	0
306	Total Applications of Capital Funding (D)	348	(2,318)
(306)	Surplus / (Deficit) of Capital Funding (C - D)	(348)	2,318
0	Funding Balance ((A – B) + (C – D))	0	0



What we will deliver

Climate Change and Resilience

Matukituki River — Wānaka in the distance

What we will deliver

What Climate Change and Resilience is

Our climate change and resilience work is aimed at supporting the region to adapt to the effects of climate change and to manage and reduce the risks of natural hazards. Integration of work within the activity is clear and present including:

- Our science and knowledge-based work advising and supporting our 'on the ground' management of risk.
- Our ownership, planning and management of infrastructure-based flood protection services.
- Our work to understand the implications of climate change and the implication for our Infrastructure Strategy (IS). Climate change has implications beyond our IS because the Council is working to understand the broader issues, risks and challenges. This informs adaptation planning.
- Our preparedness for natural risk events that embody our understanding of these events, their potential severity, impact-nature and response.

The following activities underpin 'Climate Change and Resilience':

- **Natural hazards and climate change**
- **Flood protection, drainage and river management**
- **Emergency management**

Group Revenue and Expenditure - Climate Change and Resilience

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
3,524 Natural Hazards & Climate Change	3,454	3,438
11,191 Flood Protection, Drainage & River Management	13,579	12,189
3,730 Emergency Management	4,018	4,000
18,445 Expenditure	21,052	19,627
4,420 General Rates	4,885	4,349
10,984 Targeted Rates	11,692	11,628
326 Fees & Charges	340	337
35 Grants	36	1,753
256 Other Income	256	256
2,424 Reserves	3,842	1,305
18,445 Revenue	21,052	19,627

Natural Hazards and Climate Change

What we do and why

The key programmes within this activity are:

- Natural hazards
- Adaptation — natural hazards and climate change
- Flood planning and forecasting

These work programmes combine to both set direction on the management of natural hazard risks in Otago and provide advice on managing related risk. Our role is to:

- Monitor and investigate natural hazards to inform our understanding of risk and opportunity relevant to community resilience.
- Communicate our understanding of risk and, where appropriate, options for managing it. This is both internally to council and externally to a wide range of organisations, groups and affected communities.
- Developing a comprehensive spatial approach to natural hazards to inform future priorities, at the same time as undertaking projects for the risks we already know about.

- Lead and collaborate on key projects to prepare and adapt to natural hazards and climate change.
- Support other activity, particularly Emergency Management and ORC's Engineering team, to understand impacts of flood events. This is provided in a planned way (e.g. potential scenarios) and in 'real time' via assessing actual events prior to and as they occur.

While there is legislation that directs ORC to address natural hazards risk and climate change as part of regional-scale planning, our experience, knowledge and community tells us that we need to be active regarding the wide variety of substantive natural hazards present in Otago. They impact people, property, infrastructure and the wider environment, so we should at least be aware and ideally manage risk where practicable.

Key work for year 2

The table below outlines key aspects of Council's work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Otago natural hazards risk assessment. The natural hazards management and adaptation programmes are based on this assessment. Scoping to be completed year 2 and implementation starts year 3 with phased delivery over time.• Flood hazard assessments (including Lindsay Creek, Alexandra, Middlemarch).• Otago Natural Hazards Database.• Assist territorial authorities with natural hazards and risk information (e.g. District Plan reviews, plan changes).• Natural hazards adaptation: Clutha Delta, Head of Lake Whakatipu, South Dunedin.• Roxburgh natural hazards management investigations.• Regional planning is the lead activity for the Climate Change Strategy.
Revised work [change]	None to report.
Key Projects [one off]	None to report

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Provide information on natural hazards and risks, including the effects of climate change, so that communities and stakeholders can make informed decisions.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Natural hazards information is available via the web-based Otago Natural Hazards Database.	Database is accessible and up-to-date 100% of the time.	Database is accessible and up to date 100% of the time. Partially achieved: 80-99% Not achieved: <80%	Database is accessible and up to date 100% of the time. Partially achieved: 80-99% Not achieved: <80%	Database is accessible and up to date 100% of the time. Partially achieved: 80-99% Not achieved: <80%
Percentage of flood warnings that are issued in accordance with the flood warning manual.	100%	100% Partially achieved: 80-99% Not achieved: <80%	100% Partially achieved: 80-99% Not achieved: <80%	100% Partially achieved: 80-99% Not achieved: <80%

What we will deliver

LoS: Collaborate with communities and stakeholders to develop and deliver natural hazards adaptation strategies.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Deliver a natural hazards management and adaptation work programme based on a new prioritisation process.*	New measure	Natural hazards prioritisation process as presented to the Safety and Resilience Committee in November 2024 is completed by June 2026.*	Annual review of priorities is completed by June 2027.*	Annual review of priorities is completed each year.
Implement prioritised natural hazard risks adaptation works.	<p>The first Head of Lake Whakatipu natural hazards adaptation strategy completed by 31 December 2024;</p> <p>Actions developed, implemented and reviewed, as per Head of Lake Whakatipu natural hazard adaptation strategy.</p>	Actions developed, implemented and reviewed, as per Head of Lake Whakatipu natural hazard adaptation strategy.	Actions developed, implemented and reviewed, as per Head of Lake Whakatipu natural hazard adaptation strategy.	Actions developed, implemented and reviewed, as per Head of Lake Whakatipu natural hazard adaptation strategy.
Implement prioritised natural hazard risks adaptation works.	Support the South Dunedin Future Programme - South Dunedin Future natural hazards adaptation plan progresses as per annual work plan.	Support the South Dunedin Future Programme - South Dunedin Future natural hazards adaptation plan progresses as per annual work plan.	Support the South Dunedin Future Programme - South Dunedin Future natural hazards adaptation plan progresses as per annual work plan.	Support the South Dunedin Future Programme - South Dunedin Future natural hazards adaptation plan progresses as per annual work plan.
Implement prioritised natural hazard risks adaptation works.	No target	Phase 1 and phase 2 of the Clutha Delta natural hazards adaptation programme completed by 30 June 2026.*	Phase 3 and phase 4 of the Clutha Delta natural hazards adaptation programme completed by 30 June 2027.*	Actions developed, implemented and reviewed, as per Clutha Delta natural hazards adaptation strategy.
*Targets have been revised for the Annual Plan 2025-2026.				

What we will deliver

Flood Protection, Drainage and River Management

What we do and why

The Council has a range of flood protection and drainage schemes which make up this activity.

They are:

Flood protection and drainage	River management
Alexandra flood protection	Designation and bylaws
Leith flood protection	Dunedin rivers and waterways
Lower Clutha flood and drainage	Clutha rivers and waterways
West Taieri drainage	Central Otago rivers and waterways
East Taieri drainage	Queenstown-Lakes' rivers and waterways
Lower Taieri Flood Protection Scheme	Waitaki rivers and waterways
Tokomairiro drainage	Lower Waitaki river control scheme (Environment Canterbury)

The ORC owns and is responsible for operation and maintenance of the above schemes. The only exception is the Lower Waitaki River Control Scheme that we own but commission external management for parts of. ORC is responsible for a lot of infrastructure, including 218km of floodbanks, 14 pumping stations, 42 bridges, 535km of drains, and 369 culverts — all of which can be impacted by things like climate change, settlement trends and change in land use. Around 43,000ha of rural and urban land is serviced by infrastructure associated with these schemes. The schemes, associated infrastructure assets and more specific detail such as why we provide the service, the issues, service standards and work programmes, are detailed in our Infrastructure Strategy.

Core functions include:

- Maintenance, renewal and development of infrastructure.
- Investigation, development and renewal of amenity projects.
- Operation of flood protection and drainage schemes during floods.
- Operation of drainage schemes 24/7 to support activity on land associated with the scheme.
- Bylaw processing and monitoring technical compliance with bylaws.
- River management including the control of channel erosion, willow maintenance, vegetation control, removing obstruction, and repairing critical erosion works.
- Input to consent applications for gravel extraction with a focus on flood protection and river health.

What we will deliver

Key works for year 2

The work programme as defined in the ORC Infrastructure Strategy has been reviewed and updated as part of the Annual Plan 2025-26. The detailed draft work programme can be found on the website.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Investigations looking at hazards in Middlemarch and Lindsay Creek (North Dunedin), resilience work for the Kaikorai Stream near Green Island.• Installation of river mouth monitoring technology in key areas.• Establish liaison groups — a decision made during the Long-Term Plan process. Lower Taieri, was recently set-up and will be followed by new liaison groups for the Lower Clutha and Tokomairiro catchment schemes.• Maintenance of flood and drainage infrastructure: 218km of floodbanks, 14 pumping stations, 42 bridges, 535km of drains, and 369 culverts.
Revised work [change]	<ul style="list-style-type: none">• Timing of delivery - While more work is planned across the region over the long term, less than forecast will be spent in 2025–2026. This is because the focus is largely on planning for efficient project delivery in subsequent years.• In the LTP there was a focus on increasing quantity and scale of river management works across Otago with a significant ramp up of our operational river management budgets forecast. However, analysis of the programme, the regulatory environment, the resource needs and availability has indicated that this growth will occur over a longer period. Operational river management budgets for Year 2 have subsequently been reduced to reflect this.• Reduction in river channel maintenance within scheme boundaries; however, the LTP still forecasts an increase in this activity in future years as Engineering obtains the necessary resource consent and embeds the associated practices to execute this activity. Note that this does not affect specific projects that have been identified within scheme boundaries, such as Silver Stream capacity maintenance.
Key Projects [one off]	<ul style="list-style-type: none">• Completion of the West Taieri contour channel resilience project, which has strengthened the scheme and reconstructed parts of the floodbank. This work is funded by ORC and central government.

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Protect communities, their livelihoods and infrastructure from the impacts of flood events.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Percentage of scheme maintenance programme: Major flood protection drainage and control works are maintained, repaired, and renewed to the key standards defined in relevant planning documents.	≥ 85% of planned maintenance programme completed.	≥ 85% of planned maintenance programme completed.	≥ 85% of planned maintenance programme completed.	≥ 85% of planned maintenance programme completed.
Percentage of scheme renewals programme: Major flood protection and control works are maintained, repaired, and renewed to the key standards defined in relevant planning documents.	≥ 85% of renewal programmes completed.	≥ 85% of renewal programmes completed.	≥ 85% of renewal programmes completed.	≥ 85% of renewal programmes completed.

LoS: Respond efficiently and effectively to community issues relating to rivers, schemes and flood events.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
The flood repair programme is made available to affected communities within 3 months of the event.	100%	100%	100%	100%
Percentage of identified and reported issues that have been investigated and appropriate action determined and communicated to affected landholders within 20 working days.	100%	98%*	98%*	98%*
*Targets have been revised for the Annual Plan 2025-2026.				

LoS: Maintain channel capacity and stability, while balancing environmental outcomes and recognising mana whenua values in rivers.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Percentage of planned maintenance programme: channel works are maintained, repaired, and renewed to the key standards defined in relevant planning documents.	≥ 85% of planned maintenance programme completed.	≥ 85% of planned maintenance programme completed.	≥ 85% of planned maintenance programme completed.	≥ 85% of planned maintenance programme completed.

Emergency Management

What we do and why

This activity is responsible for the coordination of hazard reduction, readiness, response and recovery for emergency events. It is provided in partnership with councils, emergency response organisations and other stakeholders of the Otago region.

The work of the Otago Civil Defence Emergency Management (CDEM) Group is administered and coordinated by the Otago Regional Council, while governance and operations are overseen by the Coordinating Executive Group (CEG) and the Otago CDEM Joint Committee.

This committee has the statutory responsibility for civil defence emergency management in Otago. It is a statutory committee of Council under the Civil Defence Emergency Management Act 2002 (the Act) and the Local Government Act. Ultimately it is responsible for:

- Integrating and coordinating civil defence emergency management planning and activities
- Ensuring the response to and management of the adverse effects of emergencies within Otago
- Overseeing the coordination of the response and recovery activities across a range of agencies

Key work for year 2

The table below outlines key aspects of Council's planned work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Implement the 'Group Plan'• Lifelines: defines regional critical infrastructure risk and identifies priorities for resilient infrastructure investment.• Warning system remains operational• Mana whenua emergency management Facilitator: marae and mana whenua networks that are resilient in the face of emergencies• Community Resilience: Clued Up Kids programme.• ORC Emergency Coordination Centre (ECC) Training and Capability: ORC staff are trained and capable.
Revised work [change]	None to report
Key Projects [one off]	Integrative projects with Hazards Activity: Flood modelling, tsunami modelling.

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Support the Otago CDEM Group in improving the resilience of Otago to Civil Defence emergencies.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Support is provided to Emergency Management Otago to fulfil Otago CDEM Group requirements as defined in the CDEM Act and CDEM.	Fulfil all requirements as the administering authority and the Otago CDEM Partnership Agreement.	Fulfil all requirements as the administering authority and the Otago CDEM Partnership Agreement.	Fulfil all requirements as the administering authority and the Otago CDEM Partnership Agreement.	Fulfil all requirements as the administering authority and the Otago CDEM Partnership Agreement.

LoS: Provide resources to coordinate a region-wide response to a Civil Defence emergency

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Provide a regional coordination facility (ECC) capable of coordinating a region-wide emergency.	An appropriate facility as defined in the CDEM Partnership Agreement is available for immediate activation.	An appropriate facility as defined in the CDEM Partnership Agreement is available for immediate activation.	An appropriate facility as defined in the CDEM Partnership Agreement is available for immediate activation.	An appropriate facility as defined in the CDEM Partnership Agreement is available for immediate activation.
	Adequate staff (as defined in the Group Training and Capability Strategy) are trained and capable to coordinate a region-wide response.	Adequate staff (as defined in the Group Training and Capability Strategy) are trained and capable to coordinate a region-wide response.	Adequate staff (as defined in the Group Training and Capability Strategy) are trained and capable to coordinate a region-wide response.	Adequate staff (as defined in the Group Training and Capability Strategy) are trained and capable to coordinate a region-wide response.
Emergency Management Otago staff are available to respond 24/7 to a Civil Defence emergency.	Maintain a duty roster for 24/7 – 365 coverage for initial responses to Civil Defence emergencies.	Maintain a duty roster for 24/7 – 365 coverage for initial responses to Civil Defence emergencies.	Maintain a duty roster for 24/7 – 365 coverage for initial responses to Civil Defence emergencies.	Maintain a duty roster for 24/7 – 365 coverage for initial responses to Civil Defence emergencies.

What we will deliver

Funding Impact Statement - Climate Change and Resilience

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
Sources of Operating Funding			
4,420	General rates, uniform annual general charge, rates penalties	4,885	4,349
10,984	Targeted rates	11,692	11,628
35	Subsidies and grants for operating purposes	36	1,753
326	Fees and charges	340	337
0	Internal charges and overheads recovered	0	986
256	Local authorities fuel tax, fines, infringement fees and other receipts	256	256
16,021	Total Sources of Operating Funding (A)	17,209	19,309
Applications of Operating Funding			
14,637	Payments to staff and suppliers	16,606	15,434
0	Finance costs	0	0
2,892	Internal charges and overheads applied	3,445	4,227
0	Other operating funding applications	0	0
17,529	Total Applications of Operating Funding (B)	20,051	19,661
(1,508)	Surplus (deficit) of operating funding (A - B)	(2,842)	(352)
Sources of Capital Funding			
0	Subsidies and grants for capital expenditure	0	0
0	Development and financial contributions	0	0
0	Increase (decrease) in debt	0	0
0	Gross proceeds from sale of assets	0	0
0	Lump sum contributions	0	0
0	Other dedicated capital funding	0	0
0	Total Sources of Capital Funding (C)	0	0
Applications of Capital Funding			
0	Capital Expenditure - To meet additional demand	0	
1,265	Capital Expenditure - To improve level of service	385	0
3,360	Capital Expenditure - To replace existing assets	6,470	7,997
(6,133)	Increase / (Decrease) in reserves	(9,697)	(8,349)
0	Increase / (Decrease) in investments	0	
(1,508)	Total Applications of Capital Funding (D)	(2,842)	(352)
1,508	Surplus / (Deficit) of Capital Funding (C - D)	2,842	352
0	Funding Balance ((A – B) + (C – D))	(0)	0

What we will deliver

Transport



Shotover Bridge, Central Otago

What we will deliver

What Transport is

The Council is responsible for Otago's Regional Land Transport Plan (RLTP) and Regional Public Transport Plan (RPTP). The RLTP outlines proposed transport network improvements for the next six years and is the basis of funding applications to the National Land Transport Fund. This plan is developed under a legislative three-yearly cycle with the lead government agency, NZTA, and we collaborate with Southland Regional Council (Environment Southland). Under both plans, there are specific projects and services that the council co-funds and facilitates.

Under the RPTP, the Council has a role to deliver public passenger transport in the region. We provide public bus services in Dunedin and Queenstown through contracting to private operators. We provide the government funded region-wide Total Mobility service to assist eligible people who are unable to use public transport. Council also services and maintains three of Otago's nine stock truck effluent disposals under arrangement with local councils.

The transport activity is made up of four key work programmes:

Regional Land Transport Plan	This programme delivers our two foundational transport plans.
Public Transport Dunedin	This programme delivers public passenger transport services (buses) within Dunedin.
Public Transport Queenstown	This programme delivers public passenger transport services (buses and ferries) within the Queenstown-Lakes District.
Regional Total Mobility Services	This programme provides the government funded region-wide Total Mobility service to assist eligible people who are unable to use public transport.

Group Revenue and Expenditure - Transport

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
41,950 Transport	45,995	46,637
41,950 Expenditure	45,995	46,637
3,808 General Rates	4,495	4,358
13,315 Targeted Rates	14,404	14,237
129 Fees & Charges	130	0
18,845 Grants	20,873	20,503
7,472 Other Income	8,116	9,010
(1,619) Reserves	(2,022)	(1,472)
41,950 Revenue	45,995	46,637

What we will deliver

Regional Land Transport Plan (work programme)

What we do and why

The LTP provides for a Regional Land Transport Programme that coordinates transport planning across the region. It enables a resilient, multi modal transport system for the safe, efficient and effective movement of people and goods around the region. The Otago and Southland regional councils share this planning function through the support of a Regional Transport Committee.

A new Regional Land Transport Plan must be developed every six years and the plan reviewed after three years of operation. The plan was reviewed for the period 2021-2031 and outlines proposed transport network improvement over six years. This informs the detailed funding applications from the National Land Transport Fund over the first three years

Key work for year 2

The table below outlines key aspects of Council's work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">Transport planning: Support the Regional Transport Committee and Regional Transport Plans. Prepare bid, submit and report Council’s transport budget in Transport Investment Online. Regional Public and Active Transport Connectivity Strategy. A staged approach to the development of regional public and active transport connectivity.
Revised work [change]	
Key Projects [one off]	

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Advocate for Otago's regional transport planning priorities and aspirations at a national level

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026- 2027	2027-34
The Regional Land Transport Plan (RLTP) is reviewed and submitted in line with the Land Transport Management Act 2003 and any guidance issued by the New Zealand Transport Agency.	No target	RLTP implementation progress reported annually to Regional Transport Committee.*	RLTP review completed and adopted by Council by 30 June 2027.	No target
*Targets have been revised for the Annual Plan 2025-2026.				

Public Transport Dunedin and Queenstown (programmes)

What we do and why

The ORC contracts private operators to provide bus services in Dunedin, bus and water ferry services in Queenstown, and the 'Total Mobility Scheme' across the region.

Key work for year 2

The table below outlines key aspects of Council's work programme from 1 July 2025.

PLANNED WORK	
Existing work [no change]	<ul style="list-style-type: none">• Public Transport Dunedin and Queenstown: manage and monitor private operator service delivery contracts.• Planned operational service improvements for Queenstown public transport i.e. the business case proposal as consulted during the LTP process, with the exception of the planned ferry service expansion.
Revised work [change]	<ul style="list-style-type: none">• The planned Dunedin operational service improvements i.e. the business case proposal as consulted during the LTP process have been removed. This is due to a government decision, via Transport New Zealand, not to co-fund the improvements. The Council considered implementing the improvements without the co-funding but decided it was unaffordable and/or would put additional pressure on ratepayers in a challenging economy.• The planned ferry service improvements have been removed from the Annual Plan, due to lack of co-funding. The current service will be retained. <p>Public transport trials and investigations:</p> <ul style="list-style-type: none">• Ōamaru – trial removed, and an investigation of an Ōamaru to Dunedin service included.• Central Otago (Alexandra/Clyde/Cromwell to Queenstown service) – trial removed, and an investigation of options included.• Balclutha/Airport to Dunedin – trial removed, and an investigation of options included. <p><i>The above changes are funded from year 1 rates plus \$25,000 of additional general rates in this Annual Plan for Central Otago and Balclutha to take the total to \$50,000. These changes were approved at the 20 November 2024 Council meeting.</i></p>
Key Projects [one off]	<ul style="list-style-type: none">• Wānaka/Upper Clutha public transport business case

What we will deliver

Level of Service Statements, Measures and Targets

The service statements (LoS), measures and targets for this activity are defined in the table(s) below.

LoS: Provide efficient, reliable and accessible public transport services that meets community needs.

PERFORMANCE MEASURES	TARGETS			
	2024/2025	2025/2026	2026/2027	2027-34
Annual public transport boardings in Queenstown.	Increase	Increase	Increase	Increase
Annual public transport boardings in Dunedin.	Increase	Increase	Increase	Increase
Overall passenger satisfaction with Whakatipu public transport system at annual survey.	Maintain or increase 3yr rolling average >=90%	Maintain or increase 3yr rolling average >=90%	Maintain or increase 3yr rolling average >=90%	Maintain or increase 3yr rolling average >=90%
Overall passenger satisfaction with Dunedin Public Transport system at annual survey.	Maintain or increase 3 yr rolling average >=90%	Maintain or increase 3 yr rolling average >=90%	Maintain or increase 3 yr rolling average >=90%	Maintain or increase 3 yr rolling average >=90%
Percentage of Whakatipu scheduled services delivered.*	New measure	>95%*	>95%	>95%
Percentage of Dunedin scheduled services delivered.*	New measure	>95%*	>95%	>95%
Percentage of Whakatipu operated services departing Terminus on time.*	New measure	>90%*	>90%	>90%
Percentage of Dunedin operated services departing Terminus on time*	New measure	>90%*	>90%	>90%
Overall passenger satisfaction with Total Mobility system at annual survey.	Maintain or increase 3 yr rolling average >=90%	Maintain or increase 3 yr rolling average >=90%	Maintain or increase 3 yr rolling average >=90%	Maintain or increase 3 yr rolling average >=90%
*Targets have been revised for the Annual Plan 2025-2026.				

What we will deliver

Funding Impact Statement - Transport

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
Sources of Operating Funding			
3,808	General rates, uniform annual general charge, rates penalties	4,495	4,358
13,315	Targeted rates	14,404	14,237
18,845	Subsidies and grants for operating purposes	20,873	20,503
7,098	Fees and charges	7,671	8,642
0	Internal charges and overheads recovered	0	0
502	Local authorities fuel tax, fines, infringement fees and other receipts	576	369
43,569	Total Sources of Operating Funding (A)	48,017	48,109
Applications of Operating Funding			
40,347	Payments to staff and suppliers	44,585	45,509
0	Finance costs	0	0
930	Internal charges and overheads applied	1,141	859
0	Other operating funding applications	0	0
41,277	Total Applications of Operating Funding (B)	45,726	46,367
2,292	Surplus (deficit) of operating funding (A - B)	2,292	1,741
Sources of Capital Funding			
0	Subsidies and grants for capital expenditure	0	0
0	Development and financial contributions	0	0
0	Increase (decrease) in debt	0	0
0	Gross proceeds from sale of assets	0	0
0	Lump sum contributions	0	0
0	Other dedicated capital funding	0	0
0	Total Sources of Capital Funding (C)	0	0
Applications of Capital Funding			
0	Capital Expenditure - To meet additional demand	0	
0	Capital Expenditure - To improve level of service	0	0
0	Capital Expenditure - To replace existing assets	0	0
2,292	Increase / (Decrease) in reserves	2,292	1,741
0	Increase / (Decrease) in investments	0	0
2,292	Total Applications of Capital Funding (D)	2,292	1,741
(2,292)	Surplus / (Deficit) of Capital Funding (C - D)	(2,292)	(1,741)
0	Funding Balance ((A – B) + (C – D))	0	0

What we will deliver

Council Organisation



What Council Organisation is:

The following activities are included in 'Council Organisation':

Internal Services

This activity includes programmes of work that provide business support to all other activities of council - enabling them to deliver their work more efficiently and effectively. The business support work relates to: information services and records management; financial management and reporting; operational buildings and accommodation; human resources and health and safety, and the vehicle fleet.

Port Otago

This activity relates to specific financial management matters between Council and Port Otago - matters that ensure the investment returns or dividends received, and the transactions associated with the council debt facility are accounted for appropriately.

Group Revenue and Expenditure - Council Organisation

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
11,357 Internal	9,154	8,148
11,357 Expenditure	9,154	8,148
(19,531) General Rates	(21,531)	(21,531)
0 Targeted Rates	0	0
0 Fees & Charges	0	0
0 Grants	0	0
31,237 Other Income	34,385	28,521
(349) Reserves	(3,700)	1,157
11,357 Revenue	9,154	8,148

What we will deliver

Funding Impact Statement - Council Organisation

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
Sources of Operating Funding			
(18,312)	General rates, uniform annual general charge, rates penalties	(20,123)	(21,531)
0	Targeted rates	0	0
0	Subsidies and grants for operating purposes	0	0
0	Fees and charges	0	0
15,495	Internal charges and overheads recovered	18,794	17,474
27,765	Interest and dividends from investments	27,635	27,587
931	Local authorities fuel tax, fines, infringement fees and other receipts	4,240	2,431
25,878	Total Sources of Operating Funding (A)	30,546	25,962
Applications of Operating Funding			
16,077	Payments to staff and suppliers	18,913	18,743
9,574	Finance costs	7,517	5,464
	Internal charges and overheads applied		140
10	Other operating funding applications	10	0
25,661	Total Applications of Operating Funding (B)	26,440	24,347
216	Surplus (deficit) of operating funding (A - B)	4,106	1,615
Sources of Capital Funding			
0	Subsidies and grants for capital expenditure	0	0
0	Development and financial contributions	0	0
5,000	Increase (decrease) in debt	7,500	24,700
500	Gross proceeds from sale of assets	2,567	5,846
0	Lump sum contributions	0	0
0	Other dedicated capital funding	0	0
5,500	Total Sources of Capital Funding (C)	10,068	30,546
Applications of Capital Funding			
0	Capital Expenditure - To meet additional demand	0	
830	Capital Expenditure - To improve level of service	801	797
12,545	Capital Expenditure - To replace existing assets	3,707	10,885
(7,659)	Increase / (Decrease) in reserves	9,665	532
0	Increase / (Decrease) in investments	0	19,947
5,716	Total Applications of Capital Funding (D)	14,173	32,161
(216)	Surplus / (Deficit) of Capital Funding (C - D)	(4,106)	(1,615)
(0)	Funding Balance ((A – B) + (C – D))	(0)	(0)

Forecast Financial Information

Forecast Financial Information



Young River

ANNUAL PLAN 2025-2026

57

Forecast Financial Information

Overview
Operational expenditure

2024/25 LTP \$000s	Activity	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
13,343	Governance and Community Engagement	15,165	15,518
2,925	Regional Planning	3,066	2,640
12,568	Regulatory	13,846	14,173
28,836	Sub total Regional Leadership	32,077	32,331
20,140	Land & Water	21,875	20,125
8,955	Biodiversity & Biosecurity	12,013	11,996
1,377	Air	1,792	1,769
30,472	Sub total Environment	35,680	33,891
3,524	Natural Hazards & Climate Change	3,454	3,438
11,191	Flood Protection, Drainage & River Management	13,579	12,189
3,730	Emergency Management	4,018	4,000
18,445	Sub total Climate Change and Resilience	21,052	19,627
41,950	Transport	45,995	46,637
11,357	Council Organisation	9,154	8,148
131,060	Total Expenditure	143,958	140,634

Forecast expenditure at the activity level totals \$141 million compared to the \$144 million as consulted and agreed with the community for the LTP year 2. The proposed total expenditure represents a decrease of \$3 million compared to the year 2 Long-Term Plan forecast.

Sources of funding

2024/25 LTP \$000s	Funding Source	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
29,046	General Rates	32,143	31,160
35,846	Targeted Rates	41,680	37,306
4,364	Fees & Charges	4,729	13,621
21,991	Grants	23,814	25,162
39,224	Other Income	43,017	29,156
588	Reserves	(1,425)	4,228
131,060	Total Sources of Funding	143,958	140,634

The table above shows the forecast sources of funding applied to the cost of council activity. The total rating revenue (general and targeted) is \$68 million.

Planning Assumptions

The significant forecasting assumptions are scheduled in the Long-Term Plan 2024-34 (LTP). The significant forecasting assumptions from the LTP and any material changes in this Annual Plan are discussed below. Actual results achieved are likely to vary from these assumptions and these variations may be material.

Non-financial assumptions

People and Government

Population growth and demographic change

An increasing and ageing population with different rates of population increase in different parts of the region.

Assumption	Otago's total population was 251,300 in 2024, up 1.1% from a year earlier. This compares to total population growth of 1.7% in New Zealand over the same period. Between the years 2023-2033, the region's population will increase by a projected 6% to reach 264,700 (Source: Statistics New Zealand). Population within the Queenstown Lakes and Central Otago districts is forecast to grow significantly over the 10 years, with much smaller increases in Clutha, Waitaki and Dunedin. Otago's median age is forecast to increase, with fewer in the under 15 age group and more in the over 65 age group than the New Zealand average.
Risk	There is a risk that population growth forecasts are incorrect. Changes in population may impact the level of certain activities carried out by council, such as transport, demand on resource use, environmental incidents, civil defence and emergency management and natural hazards. Council's work programmes have considered the projected growth in the region, with new initiatives and resources being provided to address the impacts of population growth.
Uncertainty	High. Population growth might be lower than the projections if there is a lack of international migration. Population growth might be higher than the projections if there is stronger migration driven by larger numbers of returning New Zealanders, Otago's relative affordability in an international context, and a diverse range of well serviced and connected urban, semi-urban and rural living choices at an overall lower density than the rest of New Zealand.
Impact	Accommodating increasing numbers of people will require greater use of and investment in infrastructure, public transport, housing, and waste disposal services (to name but a few); and places greater demands on ecological services to meet those needs. An ageing population may see the demands on health care and social assistance increase and the labour supply proportionately decrease.

Forecast Financial Information

Role of Local Government

New legislation, changing regulation and policy reform provide a dynamic context for local government in New Zealand.

Assumption	Changes in Government policy will directly impact the roles and responsibilities of council. This plan assumes that there will be changes in the legislation that will impact on council’s work programmes this year. There is significant government reform underway that will impact the role of local government, our communities and how we manage environmental outcomes. Council is anticipating reform and policy change in the areas of: resource management (at system level), water services, freshwater and land management (including the National Planning Framework), climate change, public transport and more. Specifically, the Government has announced it will repeal the Resource Management Act 1991 in 2026 and replace it with two new acts: a Planning Act addressing land-use (particularly in urban areas), and a Natural Environment Act addressing the use, protection, and enhancement of the natural environment. We anticipate that the Government will continue to repeal and replace various policies that ORC has been working under. Implementing new legislative requirements has been considered in the development of our work programme. It is assumed that any further legislative changes will include a transition period to understand and implement these changes.
Risk	Further significant local government reform occurs in the next year. New requirements are greater than expected.
Uncertainty	Medium to high.
Impact	The National Planning Framework and its components will require significant implementation efforts from regional councils. Changes to the resource management system will also be significant, however, it is not likely that Otago’s transition to the new system will occur in the short-medium term.

Te Tiriti o Waitangi and iwi partnerships

There is a strong expectation that local government will work in genuine partnership with mana whenua.

Assumption	Council will provide for increasing Kāi Tahu participation in decision making, especially around natural resource use and protection and to protect Treaty rights. National directions are also increasingly requiring consideration of mātauraka Māori in decision making and monitoring/reporting.
Risk	Council and mana whenua do not partner with each other as anticipated.
Uncertainty	Low.
Impact	The whole of the organisation is responsible for ensuring adequate level of mana whenua involvement and integrating mātauraka Kāi Tahu in monitoring, reporting and decision making processes.

Collaboration

Through effective collaboration, organisations can identify shared goals, pool resources and reduce duplication.

Assumption	Third parties are willing to work in collaboration with council and can contribute to key projects in the timeframes underpinning this Long-Term Plan. Local authorities in Otago, the lower South Island and nationally will work together to establish and maintain collaborative relationships and mechanisms where appropriate.
Risk	That collaborative relationships are not fit for purpose, limiting effective collaboration.
Uncertainty	Medium.
Impact	Collaboration with third parties is a key factor in the successful delivery of environmental projects and other services. There is scope to strengthen collaborative links with other agencies, including in such areas as air quality, biodiversity and environmental science.

Economy and technology

Economic growth

A diverse regional economy, facing national and global economic uncertainty.

Assumption	<p>In 2024, Otago’s regional GDP was valued at NZ \$18,647 million. This reflects an increase of 2.4% for the year, which was higher than the national average of 1.4%. The top three industries in terms of GDP were construction; professional, scientific and technical services; and rental, hiring and real estate services. Available economic modelling suggests that Otago's GDP growth in the 10 years from 2020–2030 will be around 14% in total, which is lower than in the prior 10 years (30%). This may constrain resources and funding.</p> <p>Otago districts have different economic structures. Clutha and Waitaki’s economies are focused heavily on the primary sector and have a bigger manufacturing sector than other districts. Dunedin’s economy is relatively concentrated on tertiary sectors (e.g. food and accommodation, retail and health and social services); Central Otago’s economy relies more on both the primary and the tertiary sector; and Queenstown-Lakes' economy has the highest tertiary sector concentration in the region.</p>
Risk	Economic growth is lower than predicted. Tourism, primary production and education may be impacted more than expected by global trends, such as a decline in visitors and environmental pressures.
Uncertainty	Medium.
Impact	A substantive downturn in Otago's economy would impact on all aspects of council's operations, industry in the region and, in the longer term, protection of natural resources.

Forecast Financial Information

Employment

Economic forecasts signal lower employment growth overall with significant variation across the region.

Assumption	The region's employment growth in the 10 years to 2030 is estimated to be 13% (or 1,700 people per year on average), which is lower than the previous 10 years (22%). The construction; health care and social assistance; and accommodation and food services sectors are estimated to be the top three sectors in the region by employment by 2030. The prominence of these sectors varies significantly across the region.
Risk	Employment growth is lower than predicted, impacting on businesses' ability to deliver services, such as housing and health care and employers' ability to attract and secure talent.
Uncertainty	Medium.
Impact	Otago's employment rate is an important indicator of wellbeing in the region, as well as impacting on council's ability to operate.

Inflation and cost of living

A period of high inflation is impacting on households, industry, businesses and organisations.

Assumption	This plan assumes inflation of 2.2% which has reduced slightly from the level assumed for year 2 in the Long-Term Plan 2024-2034 of 2.7%. Lower inflation increases purchasing power and reduces the cost of delivering Council services.
Risk	Inflation increases above the assumed level.
Uncertainty	Medium.
Impact	High inflation rates will impact on the cost of delivering council services and increase financial pressure on households and businesses.

Technology

Increasing innovation that may facilitate more efficient and sustainable uses of natural resources and public transport systems.

Assumption	Technology advances will have to have a profound impact on environmental management (for both council and primary producers), consumer expectations and transport systems. Technological innovation will continue to transform the economy and the way people live and work in Otago. Demands will increase for new public transport models to reduce emissions and meet communities' needs.
Risk	Technology replaces more jobs than it creates. Adoption of new technology is uneven, resulting in digital inequality. Technology jobs have higher skill requirements for employment and increase barriers to employment for disadvantaged groups.
Uncertainty	High.

Forecast Financial Information

Impact	Council can expect to see increasing demand for reliable, accessible and up-to-date environmental information. The public transport offer may need to be reshaped as needs and expectations change.
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Environment and climate

Environment

Parts of the region are facing pressures through changing land use and its environmental impacts.

Assumption	That environmental loss and pressure on natural resources will increase over the planning period. Otago faces environmental challenges associated with land use, affecting air and soil quality, ocean and coastal areas. Climate change and biodiversity loss both exacerbate these concerns. Food production may be an area of significant change over the next three years
Risk	Greater than expected environmental loss and/or pressure on natural resources in the next three years. Large-scale land use change and/or drastic change in direction for current land use trends in the next three years.
Uncertainty	Low.
Impact	Council can expect greater involvement in the planning and management of urban growth, land use intensification and land use change.

Climate change

Increasing exposure to climate change effects, including those from natural hazards.

Assumption	<p>Climate change projections for the Otago region include warmer temperatures, with more hot days and fewer frosts. Winter and spring are expected to be wetter, but with significant decreases in seasonal snow likely. More severe extreme rainfall events are anticipated, as is the severity and frequency of windy days. Even with intervention, sea level rise is expected for the next 100 years and more. Hazards associated with these changes in climate are likely to include increased flooding and landslides, drought, coastal inundation and erosion and increased instances of wildfire.</p> <p>Climate change will increase the severity and frequency of the natural hazards that we experience in New Zealand, including flooding, heatwaves, drought and wildfire. Otago will experience adverse events. For the purpose of this LTP, it is assumed that:</p> <ul style="list-style-type: none">• There will be one significant flood event impacting on ORC’s flood and drainage infrastructure every year.• There will not be any significant droughts/low flows event — should one happen, it will likely lead to a reprioritisation of work and resources.
Risk	The severity of natural hazard events may be greater or happen sooner than anticipated. Some groups and communities may be disproportionately affected by financial impacts or the lack of the resources to adapt.
Uncertainty	Medium. Though the overall impacts of climate change on the region's climate are well known, there is uncertainty over specific impacts at a local/catchment level.

Forecast Financial Information

Impact	Impacts of climate change include risk to terrestrial and wetland ecosystems, water quantity and quality, coastal communities and infrastructure such as flood management schemes. Climate change will also impact Otago’s economy (via the primary sector and tourism especially), community cohesion, public health and cultural identity. Adverse events can have large impacts on community wellbeing and may result in loss of lives, injuries and property damage.
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Financial Assumptions

Sources of funds for future replacement of significant assets

Assumption	Sources of funds for the future replacement of significant assets are in accordance with council’s Revenue and Financing Policy. For infrastructure assets, these are funded through scheme reserves and/or borrowing (either internal or external). Reserves are then repaid through depreciation, targeted rates from the defined scheme areas and grants where possible. Council’s non-infrastructure assets are funded from the asset replacement reserve and where necessary, general reserves and/or borrowings.
Risk	Low. There is a risk that council won’t be able access the funding required to replace significant assets. Council has the ability to borrow the forecast levels of expenditure over this plan and will remain compliant with council’s and the Local Government Funding Agency’s borrowing limits.
Uncertainty	Medium. The level of infrastructure expenditure included in this plan is constant with the Long-Term Plan 2024-34 which included a increase from current levels and previous Long-Term Plans.

Waka Kotahi NZ Transport Agency subsidy rates

Assumption	<p>The following subsidy rates are as currently advised by Waka Kotahi NZ Transport Agency:</p> <ul style="list-style-type: none">• Transport planning and public passenger transport to receive 51% subsidy;• Total Mobility to receive 60% subsidy;• Total Mobility flat rate payments to receive 100% subsidy.
Risk	High. Waka Kotahi funds a significant amount of council’s transport programme and should this funding be withdrawn or reduced significantly this would require a corresponding significant reduction in service and/or increase in rates.
Uncertainty	Low. Waka Kotahi NZ Transport Agency has given no indication that the rates may change during the LTP period. If the subsidy for Total Mobility was to decrease, the impact would be directly on general rates. Any changes in subsidy for public passenger transport would impact directly on targeted rates, fares and/or the scope of services.

Useful lives of significant assets

Assumption	The useful lives of significant assets are as recorded in asset management plans or based upon current financial standards. Depreciation has been calculated in accordance with current accounting policy.
Risk	Low.
Uncertainty	Low.

Forecast Financial Information

Revaluation of non-current assets

Assumption	The non-current assets that are revalued annually are council’s investment properties and its shareholding in Port Otago Limited. For the purposes of this plan, an assumption has been made that the value of council’s investment in Port Otago will grow in value by 4%. Investment properties are assumed to increase in value by 1%.
Risk	Low. The revaluation of non-current assets does not directly impact rates.
Uncertainty	High. Actual revaluations may differ significantly from the assumptions in the plan. The valuation of Port Otago Limited is based on a number of factors including current and forecast operating performance, asset revaluations and the cost of capital. Any or all of these factors can vary making revaluation forecasting inherently uncertain.

Forecast return on investments

Assumption

	LTP 24/25	LTP 25/26	Annual Plan 25/26
Cash / Term Deposits	4.90%	3.60%	3.60%
Managed Fund *	7.65%	6.35%	5.65%
Port Otago Dividends **	\$18M	\$20M	\$20M

* Managed fund is total return including capital movement and gross income.

** All Port Otago Limited dividends will be received fully imputed and accordingly no taxation liability will arise.

Risk

Medium. The cash and managed fund returns are based on underlying interest rate forecasts. Port Otago dividends are reliant on the underlying performance of the Port and its ability to pay those dividends. With respect to earning rates, the Statement of Investment Policy and Objectives for council’s managed fund estimates council’s rate of return at between 2.3%–3.1% plus inflation. As investment income is used to reduce general rates, any change in return on investments will impact directly on the level of general rates.

Uncertainty

Low to medium. Port Otago Limited has a stable trade base. Port operating and property performance over past years have been consistent, as are predictions for future trade which should allow for stable dividend payments over the life of this plan. Investment returns are subject to movements in the underlying financial markets and could differ significantly from the rates assumed in the estimates.

Forecast borrowing rates

Assumption	LTP 24/25		LTP 25/26	Annual Plan 25/26
	External	5.30%	4.00%	4.00%
	Internal	2.50%	2.50%	2.50%

Risk	Medium. The interest rates are based on underlying interest rate forecasts which are subject to market forces and fluctuations. Council’s Treasury Management Policy includes parameters to manage interest rate risk.
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Forecast Financial Information

Uncertainty	Medium. Interest rates are subject to movements in the underlying financial markets and could differ significantly from the rates assumed in the estimates.
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Capital expenditure

Assumption	Various projects require spending of a capital nature. The estimates are prepared using actual costs, adjusted for inflation where known, or “rough order of costs”. These have been determined using methods such as current known costs.
Risk	Medium. There is risk that actual costs will differ from the estimates and that this difference may be significant. Capital purchases in respect of flood and drainage schemes are funded by those schemes and any variation in costs will impact on their depreciation and reserves. Variations in other capital expenditure will impact on council’s Asset Replacement Reserve.
Uncertainty	Medium. The risk is market dependent and outside of council’s direct control, such as the cost of construction materials and freight.

Investment properties

Assumption	This plan assumes that council will not sell any of its investment properties over the next financial year.
Risk	Low.

Forecast Financial Information

Financial Statements

Prospective Statement of Comprehensive Revenue and Expense for the year ending 30 June 2026

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
REVENUE FROM NON-EXCHANGE TRANSACTIONS			
64,893	Rates revenue	73,823	68,467
21,991	Grant and subsidies revenue	23,814	25,162
10,856	Other revenue	15,105	3,316
REVENUE FROM EXCHANGE TRANSACTIONS			
18,000	Dividends	20,000	20,000
9,765	Investment revenue	7,635	6,090
3,644	Other revenue	3,903	13,371
129,149	TOTAL REVENUE	144,280	136,406
EXPENDITURE			
39,454	Employee Benefits	41,355	42,388
3,302	Depreciation and amortisation	3,380	3,075
9,424	Finance Costs	7,363	5,464
78,879	Other operating expenses	91,860	89,708
131,060	TOTAL EXPENDITURE	143,958	140,634
1,493	Other Gains/Losses	1,274	4,958
(418)	SURPLUS/(DEFICIT)	1,596	730
OTHER COMPREHENSIVE REVENUE AND EXPENDITURE			
28,156	Fair value gain/loss on shares in subsidiary	29,283	29,649
27,738	TOTAL OTHER COMPREHENSIVE REVENUE AND EXPENDITURE	30,880	30,379

Prospective Depreciation by Activity for the year ending 30 June 2026

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
131	Regional Leadership	151	154
391	Environmental	451	441
877	Resilience & Climate Change - Flood	965	917
39	Resilience & Climate Change - Hazards	36	17
673	Transport	269	269
1,191	Corporate	1,508	1,276
3,302	TOTAL DEPRECIATION	3,380	3,075

Forecast Financial Information

Prospective Statement of Financial Position as at 30 June 2026

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
CURRENT ASSETS:			
2,455	Cash and cash equivalents	3,077	4,069
29,181	Other financial assets	31,034	31,619
18,180	Trade and other receivables	18,175	18,812
0	Inventories	0	0
0	Property intended for sale	0	0
	Related party receivables Current		38,480
1,433	Other current assets	1,433	3,350
51,248	TOTAL CURRENT ASSETS	53,718	96,329
NON-CURRENT ASSETS:			
109,835	Property, plant and equipment	116,365	138,705
17,134	Investment property	17,306	0
780,239	Shares in Port Otago Ltd	809,522	790,878
2,025	Intangible assets	1,951	0
150,088	Related Party Receivables	150,088	106,850
500	Borrower Notes	500	2,258
0	Deferred tax asset	0	0
1,059,821	TOTAL NON-CURRENT ASSETS	1,095,731	1,038,691
1,111,069	TOTAL ASSETS	1,149,449	1,135,021
CURRENT LIABILITIES:			
22,594	Accounts payable	22,594	21,278
69,878	Borrowings (secured)	71,378	48,355
2,716	Employee entitlements	2,716	2,628
95,188	TOTAL CURRENT LIABILITIES	96,688	72,261
NON-CURRENT LIABILITIES:			
110,438	Borrowings (secured)	116,438	135,733
110,438	TOTAL NON-CURRENT LIABILITIES	116,438	135,733
205,626	TOTAL LIABILITIES	213,126	207,994
905,443	NET ASSETS	936,323	927,027
EQUITY:			
120,576	Public equity	124,965	131,473
760,239	Port Otago Limited Revaluation Reserve	789,522	770,878
(1,705)	Asset replacement reserve	(4,365)	(6,263)
0	Building reserve	0	2,965
4,869	Emergency response reserve	4,991	4,801
6,396	Kuriwao endowment reserve	5,970	6,955
15,069	Asset revaluation reserve	15,241	16,218
905,443	TOTAL EQUITY	936,323	927,027

Forecast Financial Information

Prospective Statement of Changes in Net Assets/Equity as at 30 June 2026

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
877,705 Balance at 1 July	905,443	896,647
27,738 Net Comprehensive Income	30,880	30,379
905,443 BALANCE AT 30 JUNE	936,323	927,027
NET MOVEMENTS		
(1,911) Net surplus transferred to Public Equity	322	11,052
16,606 Public Equity	4,067	0
28,156 Port Otago Limited Revaluation Reserve	29,283	29,649
(5,875) Asset Replacement Reserve	(2,660)	(5,974)
119 Emergency Response Reserve	122	0
(424) Kuriwao Reserve	(426)	(108)
170 Asset Revaluation Reserve	171	170
(479) Water Management Reserve	0	16
(8,609) Building Reserve	0	(4,426)
(13) Environmental Enhancement Reserve	0	0
27,738 Net Comprehensive Income	30,880	30,379
905,443 BALANCE AT 30 JUNE	936,323	927,027

Forecast Financial Information

Prospective Statement of Reserves as at 30 June 2026

2024/25 LTP \$000s	Reserve	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
ASSET REPLACEMENT RESERVE			
4,170	Opening balance	(1,705)	(289)
2,423	Transfers into reserves	2,414	2,160
(8,298)	Transfers out of reserves	(5,074)	(8,134)
(1,705)	ASSET REPLACEMENT RESERVE	(4,365)	(6,263)
ASSET REVALUATION RESERVE			
14,900	Opening balance	15,069	16,048
170	Transfers into reserves	171	170
0	Transfers out of reserves	0	0
15,069	ASSET REVALUATION RESERVE	15,241	16,218
BUILDING RESERVE			
8,609	Opening balance	0	7,390
0	Transfers into reserves	0	0
(8,609)	Transfers out of reserves	0	(4,426)
0	BUILDING RESERVE	0	2,965
EMERGENCY RESPONSE RESERVE			
4,750	Opening balance	4,869	4,801
119	Transfers into reserves	122	0
0	Transfers out of reserves	0	0
4,869	EMERGENCY RESPONSE RESERVE	4,991	4,801
ENVIRONMENTAL ENHANCEMENT RESERVE			
13	Opening balance	0	0
(13)	Transfers into reserves	0	0
0	Transfers out of reserves	0	0
0	ENVIRONMENTAL ENHANCEMENT RESERVE	0	0
KURIWAO RESERVE			
6,820	Opening balance	6,396	7,064
206	Transfers into reserves	196	40
(630)	Transfers out of reserves	(621)	(148)
6,396	KURIWAO RESERVE	5,970	6,955
PORT OTAGO LIMITED REVALUATION RESERVE			
732,083	Opening balance	760,239	741,229
28,156	Transfers into reserves	29,283	29,649
0	Transfers out of reserves	0	0
760,239	PORT OTAGO LIMITED REVALUATION RESERVE	789,522	770,878
PUBLIC EQUITY			

Forecast Financial Information

64,150	Opening balance	80,514	81,109
29,408	Transfers into reserves	33,589	37,780
(13,043)	Transfers out of reserves	(26,490)	(19,312)
80,514	PUBLIC EQUITY	87,613	99,578
	BIOSECURITY		
(1,494)	Opening balance	(1,530)	(1,509)
6,282	Transfers into reserves	6,874	(37)
(6,317)	Transfers out of reserves	(6,911)	0
(1,530)	BIOSECURITY	(1,567)	(1,545)
	DAIRY MONITORING		
(79)	Opening balance	(141)	(73)
210	Transfers into reserves	0	(2)
(272)	Transfers out of reserves	(4)	0
(141)	DAIRY MONITORING	(145)	(75)
	DUNEDIN TRANSPORT		
(9,049)	Opening balance	(7,443)	(9,785)
27,516	Transfers into reserves	30,828	1,606
(25,910)	Transfers out of reserves	(29,182)	0
(7,443)	DUNEDIN TRANSPORT	(5,796)	(8,178)
	EMERGENCY MANAGEMENT		
(51)	Opening balance	(33)	(95)
3,730	Transfers into reserves	4,018	(2)
(3,712)	Transfers out of reserves	(4,000)	
(33)	EMERGENCY MANAGEMENT	(15)	(97)
	FLOOD AND DRAINAGE ALEXANDRA		
61	Opening balance	62	49
352	Transfers into reserves	336	43
(351)	Transfers out of reserves	(334)	0
62	FLOOD AND DRAINAGE ALEXANDRA	64	92
	FLOOD AND DRAINAGE EAST TAIERI		
(451)	Opening balance	(674)	(488)
719	Transfers into reserves	761	579
(941)	Transfers out of reserves	(1,425)	(1,226)
(674)	FLOOD AND DRAINAGE EAST TAIERI	(1,338)	(1,135)
	FLOOD AND DRAINAGE LEITH		
(12,635)	Opening balance	(11,900)	(12,272)
1,570	Transfers into reserves	1,570	960
(836)	Transfers out of reserves	(954)	(241)
(11,900)	FLOOD AND DRAINAGE LEITH	(11,283)	(11,552)
	FLOOD AND DRAINAGE LOWER CLUTHA		
(682)	Opening balance	(1,085)	(1,598)
1,757	Transfers into reserves	1,843	626

Forecast Financial Information

(2,160)	Transfers out of reserves	(2,935)	(1,827)
(1,085)	FLOOD AND DRAINAGE LOWER CLUTHA	(2,177)	(2,799)
FLOOD AND DRAINAGE LOWER TAIERI			
2,934	Opening balance	1,127	3,342
1,355	Transfers into reserves	1,374	765
(3,162)	Transfers out of reserves	(4,405)	(3,704)
1,127	FLOOD AND DRAINAGE LOWER TAIERI	(1,904)	402
FLOOD AND DRAINAGE TOKOMAIRIRO			
43	Opening balance	(215)	(207)
175	Transfers into reserves	192	80
(434)	Transfers out of reserves	(691)	(572)
(215)	FLOOD AND DRAINAGE TOKOMAIRIRO	(714)	(700)
FLOOD AND DRAINAGE WEST TAIERI			
(2,634)	Opening balance	(3,500)	(3,349)
988	Transfers into reserves	1,033	681
(1,855)	Transfers out of reserves	(2,725)	(2,456)
(3,500)	FLOOD AND DRAINAGE WEST TAIERI	(5,192)	(5,123)
INFRASTRUCTURAL ASSETS			
67,547	Opening balance	69,940	68,389
3,230	Transfers into reserves	5,926	0
(837)	Transfers out of reserves	(896)	0
69,940	INFRASTRUCTURAL ASSETS	74,970	68,389
QUEENSTOWN TRANSPORT			
(2,317)	Opening balance	(1,906)	(1,698)
12,904	Transfers into reserves	12,633	420
(12,492)	Transfers out of reserves	(12,211)	(550)
(1,906)	QUEENSTOWN TRANSPORT	(1,484)	(1,828)
RIVER MANAGEMENT CENTRAL OTAGO			
269	Opening balance	55	55
381	Transfers into reserves	413	(1)
(595)	Transfers out of reserves	(714)	(217)
55	RIVER MANAGEMENT CENTRAL OTAGO	(246)	(163)
RIVER MANAGEMENT CLUTHA			
(451)	Opening balance	(857)	(1,041)
443	Transfers into reserves	491	(31)
(849)	Transfers out of reserves	(1,088)	(420)
(857)	RIVER MANAGEMENT CLUTHA	(1,454)	(1,492)
RIVER MANAGEMENT DUNEDIN			
639	Opening balance	(1,187)	(1,176)
228	Transfers into reserves	268	(42)
(2,055)	Transfers out of reserves	(1,728)	(1,003)
(1,187)	RIVER MANAGEMENT DUNEDIN	(2,647)	(2,221)

Forecast Financial Information

RIVER MANAGEMENT QUEENSTOWN LAKES DISTRICT		
(586) Opening balance	(1,172)	(61)
560 Transfers into reserves	624	(2)
(1,147) Transfers out of reserves	(1,470)	(633)
(1,172) RIVER MANAGEMENT QUEENSTOWN LAKES DISTRICT	(2,018)	(696)
RIVER MANAGEMENT WAITAKI		
964 Opening balance	757	857
650 Transfers into reserves	682	19
(857) Transfers out of reserves	(966)	(213)
757 RIVER MANAGEMENT WAITAKI	473	663
CATCHMENT MANAGEMENT		
219 Opening balance	291	622
1,652 Transfers into reserves	1,833	16
(1,579) Transfers out of reserves	(1,759)	0
291 CATCHMENT MANAGEMENT	366	637
WILDING PINES		
(514) Opening balance	(526)	(667)
250 Transfers into reserves	257	(17)
(263) Transfers out of reserves	(270)	0
(526) WILDING PINES	(540)	(683)
905,443 TOTAL RESERVES	936,323	927,027

Forecast Financial Information

Prospective Statement of Cashflows for the year ended 30 June 2026

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
	CASH FLOWS FROM OPERATING ACTIVITIES		
	Receipts from non-exchange transactions		
64,893	Rates Receipts	73,823	68,467
21,991	Grant income and subsidies	23,814	25,162
10,856	Other receipts	15,105	3,321
	Receipts from exchange transactions		
9,765	Interest and investment income	7,635	6,090
18,000	Dividends	20,000	20,000
3,649	Other receipts	3,908	13,371
(118,334)	Payments to suppliers and employees	(133,215)	(132,095)
(9,424)	Interest and other costs of finance paid	(7,363)	(5,464)
1,396	NET CASH INFLOW / (OUTFLOW) FROM OPERATING ACTIVITIES	3,707	(1,148)
	CASH FLOWS FROM INVESTING ACTIVITIES		
500	Proceeds from sale of Property, Plant and Equipment	2,567	5,846
0	Property Held for Sale	0	
(750)	Managed Fund	(750)	(750)
(17,643)	Purchase of Property, Plant and Equipment	(12,105)	(17,931)
(1,350)	Purchase of intangible assets	(298)	(2,625)
(19,243)	NET CASH INFLOW / (OUTFLOW) FROM INVESTING ACTIVITIES	(10,585)	(15,461)
	CASH FLOWS FROM FINANCING ACTIVITIES		
5,000	Proceeds from borrowings	7,500	24,700
	Port Otago Limited Lending		(17,700)
0	Repayment of borrowings	0	
5,000	NET CASH INFLOW / (OUTFLOW) FROM FINANCING ACTIVITIES	7,500	7,000
(12,848)	NET INCREASE / (DECREASE) IN CASH AND CASH EQUIVALENTS	622	(9,608)
15,303	CASH AND CASH EQUIVALENTS AS AT 1 JULY	2,455	13,677
2,455	CASH AND CASH EQUIVALENTS AS AT 30 JUNE	3,077	4,069

Forecast Financial Information

Reconciliation of Net Surplus to Net Cash from Operating Activities

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
(418) NET SURPLUS(DEFICIT) FROM ACTIVITIES	1,596	730
ADD(DEDUCT) NON CASH ITEMS:		
3,302 Depreciation and amortisation	3,380	3,075
(1,493) Other (gains)/losses	(1,274)	(4,958)
5 Bad Debts	5	5
1,396 NET CASH FROM OPERATING ACTIVITIES	3,707	(1,148)

Schedule of Capital Expenditure

2024/25 LTP \$000s	2025/26 LTP \$000s	2025/26 Annual Plan \$000s
ENVIRONMENTAL		
150 Air Monitoring	154	153
35 Public Awareness	0	
530 Water Monitoring Sites	544	542
21 Harbour Mgt	22	21
100 Biodiversity	257	153
0 Hazards	0	0
158 Compliance	62	8
TRANSPORT		
0 Transport	0	0
FLOOD PROTECTION & CONTROL WORKS		
0 Alexandra Flood Protection	0	0
150 Leith Flood Protection	205	102
300 Lower Clutha Flood & Drainage	822	613
1,650 Lower Taieri Flood Protection	2,465	4,190
930 West Taieri Drainage	1,664	1,656
100 East Taieri Drainage	411	460
100 Tokomairiro	359	358
1,395 Dunedin River Mgmt	909	598
0 Clutha River Mgmt	21	20
0 Wānaka River Mgmt	0	0
COUNCIL		
9,650 Property	2,182	9,663
800 Vehicles	822	818
2,625 Computers & Software	1,196	894
250 Plant	257	256
50 Sundry	51	51
18,993 TOTAL	12,402	20,556

Summary of Accounting Policies

Reporting entity

The Council is a regional local authority governed by the Local Government Act 2002.

The Council Group (Group) consists of the Council and its subsidiary Port Otago Limited (100% owned). The Port Otago Limited Group consists of Port Otago Limited, its subsidiaries, associates and joint ventures.

The primary objective of the Council is to provide goods or services for the community or social benefit rather than making a financial return. Accordingly, the Council has designated itself and the Group as public benefit entities for financial reporting purposes. The prospective financial information contained in this Annual Plan relates to the Council only as the group parent. The Council has not presented group prospective financial statements because the Council believes that the parent prospective financial statements are more relevant to users.

The main purpose of prospective financial statements in the Annual Plan is to provide users with information about the core services that the Council intends to provide ratepayers, the expected cost of those services and as a consequence how much the Council requires by way of rates to fund the intended levels of service.

The level of rate funding required is not affected by subsidiaries except to the extent that the Council obtains distributions from those subsidiaries. Distributions from the Council's subsidiary Port Otago Limited are included in the prospective financial statements of the Council. The Prospective Financial Statements of Council are to be adopted by Council 25 June 2025.

Statement of Compliance

The prospective financial statements have been prepared in accordance with PBE FRS 42, Prospective Financial Statements, and in accordance with Tier 1 PBE Standards appropriate for public benefit entities, as it relates to prospective financial statements.

The actual results achieved for any given financial year are likely to vary from the information presented and may vary materially depending upon the circumstances that arise during the period. The prospective financial information is prepared in accordance with Section 93 of the Local Government Act 2002. The information may not be suitable for use in any other capacity. No actual results have been incorporated in these prospective financial statements.

Council is responsible for the prospective financial statements presented, including the appropriateness of the assumptions underlying the prospective financial statements and all other required disclosures

Basis of Accounting

The prospective financial statements have been prepared on the historical cost basis, except for the revaluation of certain assets. They are presented in NZ dollars, rounded to the nearest thousand.

Standards and interpretations issued but not yet adopted

PBE Standards and interpretations that have recently been issued or amended but are not yet effective and have not been adopted by the Group for the Annual Plan are outlined below:

- Amendments to PBE IPSAS 1 – Disclosure of fee for audit firm's services; effective for periods commencing 30 June 2024
- PBE IPSAS 46 – Measurement; effective for periods commencing 1 January 2025
- PBE IPSAS 47 – Revenue; effective for periods commencing 1 January 2026
- PBE IPSAS 48 – Transfer Expenses; effective for periods commencing 1 January 2026

Council expects to adopt the above standard in the period in which it becomes mandatory. Council anticipates that the above standard is not expected to have a material impact on the financial statements in the period of initial application; however, a detailed assessment has yet to be performed.

Forecast Financial Information

Significant Accounting Policies

Revenue recognition

Revenue is recognised to the extent that it is probable that the economic benefits or service potential will flow to the Group and the revenue can be reliably measured, regardless of when the payment is being made.

Revenue from non-exchange Transactions	
TYPE	RECOGNITION AND MEASUREMENT
Rates revenue	Rates revenue is recognised as income when levied. Council levies general rates for those functions that are assessed as providing benefits to all ratepayers within each of the constituent districts and city, and levies targeted rates where functions benefit a defined group of ratepayers.
Grants and subsidies	Grants and subsidies are recognised upon entitlement, as conditions pertaining to expenditure have been fulfilled.
Other fee income	Other fee income from non-exchange transactions is recognised when the supplies and services have been rendered.

Revenue from exchange Transactions	
TYPE	RECOGNITION AND MEASUREMENT
Dividend income	Dividend income is recognised on the date of the dividend declaration.
Interest revenue	Interest revenue is recognised on a time proportionate basis using the effective interest method
Revenue from port services	Revenue from port services is recognised in the accounting period in which the actual service is provided.
Revenue from the rendering of services	Revenue from the rendering of services, including relating to contracts and consent application that are in progress at balance date, is recognised by reference to the stage of completion of the transaction at balance date, based on the actual service provided as a percentage of the total services to be provided.
Rental income from operating leases	Rental income from operating leases is recognised on a straight line basis over the term of the relevant lease. Initial direct costs incurred in negotiating and arranging an operating lease are added to the carrying amount of the leased asset and recognised as an expense on a straight-line basis over the lease term.
Fees and charges	Fees and charges are recognised as income when supplies and services have been rendered. Fees received from the following activities are recognised as revenue from exchange transactions: resource consent processing, pest animal and plant contract work, grazing leases and licenses and enforcement work.

Other gains and losses

Gains and losses on the sale of investment property, property, plant and equipment are recognised when an unconditional contract is in place, and it is probable that the council will receive the consideration due and significant risks and rewards of ownership of assets have been transferred to the buyer.

Where a physical asset is acquired for nil or nominal consideration, the fair value of the asset received is recognised as revenue. Assets vested in the council are recognised as revenue when control over the asset is obtained.

Trade and other receivables

Trade and other receivables are recorded at the amount due, less an allowance for expected credit losses (ECL).

The Council and Group apply the simplified ECL model of recognising lifetime ECL for short-term receivables.

In measuring ECLs, receivable have been grouped into rates receivables, and other receivables, and assessed on a collective basis as they possess shared credit risk characteristics. They have then been grouped based on the days past due. A provision matrix is then established based on historical credit loss experience, adjusted for forward looking factors specific to the debtors and economic environment.

Rates are "written off"

- When remitted in accordance with the Council's rates remission policy and
- In accordance with the write-off criteria of sections 90A (where rates cannot be reasonable recovered) and 90B (in relation to Maori freehold land) of the Local Government (Rating) Act 2002.

Other receivables are written-off when there is no reasonable expectation of recovery. Indicators that there is no reasonable expectation of recovery include the debtor being in liquidation or the receivable being more than two years overdue.

Intangible assets

Computer software

Computer software assets are stated at cost, less accumulated amortisation and impairment. The amortisation periods range from 1 to 5 years.

Impairment

At each reporting date, Council reviews the carrying amounts of intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any). Where the asset does not generate cash flows that are independent from other assets, Council estimates the recoverable amount of the cash-generating unit to which the asset belongs.

Property, plant and equipment

Property, plant and equipment consist of the following.

Operational assets

Operational assets include council-owned land, endowment land, buildings and plant and vehicles.

Infrastructural assets

Infrastructural assets deliver benefits direct to the community and are mostly associated with major flood protection and land drainage schemes. Infrastructural assets include floodbanks, protection works, structures, drains, bridges, culverts, bus hubs and shelters.

Transport infrastructure assets and hardware deliver benefits to the transport bus network in Whakatipu and Dunedin.

Restricted assets

Endowment land is vested in the council by the Otago Regional Council (Kuriwao Endowment Lands) Act. The Act restricts disposition of this land to freeholding initiated by lessees.

(A) Cost

Land and buildings are recorded at cost or deemed cost less accumulated depreciation and any accumulated impairment losses.

Forecast Financial Information

Other property, plant and equipment is recorded at cost less accumulated depreciation and any accumulated impairment losses. Cost includes expenditure that is directly attributable to the acquisition of the assets. Where an asset is acquired for no cost or for a nominal cost, it is recognised at fair value at the date of acquisition. When significant, interest costs incurred during the period required to construct an item of property, plant and equipment are capitalised as part of the asset’s total cost.

(B) Depreciation

Operational assets, with the exception of land, are depreciated on a straight-line basis to write-off the cost of the asset to its estimated residual value over its estimated useful life.

Infrastructural assets including floodbanks, protection works and drains and culverts are constructions or excavations of natural materials on the land and have substantially the same characteristics as land, in that they are considered to have unlimited useful lives, and in the absence of natural events, these assets are not subject to ongoing obsolescence or deterioration of service performance, and are not subject to depreciation. Other infrastructural assets are depreciated on a straight-line basis to write off the cost of the asset to its estimated residual values over its estimated useful life.

Expenditure incurred to maintain these assets at full operating capability is charged to the surplus/deficit in the year incurred.

The following estimated useful lives are used in the calculation of depreciation:

Operational Assets	Life
Buildings- Council	10- 50 years
Pland and vehicles- Council	3 -20 years
Buildings and improvements- Port	10- 50 years
Whaves- Port	15- 70 years
Vessels and floating plant- Port	5 -30 years
Plant, equipment and vehicles- Port	3 - 30 years
Infrastructural Assets	Life
Floodbanks	Unlimited
Protection works	Unlimited
Drains	Unlimited
Culverts	Unlimited
Structures	8- 100 years
Bridges	33- 100 years
Transport infrastrucutre and hardware	5 -15 years

(C) Disposal

An item of property, plant and equipment is derecognised upon disposal or recognised as impaired when no future economic benefits are expected to arise from the continued use of the asset.

Any gain or loss arising on derecognition of the asset (calculated as the difference between the net disposal proceeds and the carrying amount of the asset) is included in the surplus/deficit in the period the asset is derecognised.

Critical judgements and assumptions

The council owns a number of properties that are held for service delivery objectives as part of the council’s various flood protection schemes. The receipt of market-based rental from these properties is incidental to holding these properties. These properties are accounted for as property, plant and equipment.

Investment property

Investment property is property held to earn rentals and/or for capital appreciation. Investment property is measured initially at cost and subsequently at fair value. Gains or losses arising from changes in the fair value of investment property are reported in the surplus/deficit in the period in which they arise.

Forecast Financial Information

Subsequent expenditure is charged to the asset's carrying amount only when it is probable that future economic benefits associated with the item will flow to the group and the cost of the item can be measured reliably. The fair value of investment property reflects the director's assessment of the highest and best use of each property and, amongst other things, rental income, from current leases and assumptions about rental income from future leases in light of current market conditions. The fair value also reflects the cash outflows that could be expected in respect of the property.

No depreciation or amortisation is provided for on investment properties. However, for tax purposes, depreciation is claimed on building fit-out and a deferred tax liability is recognised where the building component of the registered building exceeds the tax book value of the building. The deferred tax liability is capped at the amount of depreciation that has been claimed on each building. Gains or losses on the disposal of investment properties are recognised in the surplus/deficit in the period in which the risks and rewards of the investment property have been fully transferred to the purchaser.

Borrowing costs are capitalised if they are directly attributable to the acquisition or construction of a qualifying property. Capitalisation of borrowing costs will continue until the asset is substantially ready for its intended use. The rate at which borrowing costs are capitalised is determined by reference to the weighted average borrowing costs and the average level of borrowings.

Fair value of property portfolio assets (includes investment property, property held for sale and property in development)

The fair value was determined using valuation techniques via a combination of the following approaches:

- Direct capitalisation: The subject property rental is divided by a market derived capitalisation rate to assess the market value of the asset. Further adjustments are then made to the market value to reflect under or over renting, additional revenue and required capital expenditure.
- Discounted cash flow: Discounted cash flow projections for the subject property are based on estimates of future cash flows, supported by the terms of any existing lease and by external evidence such as market rents for similar properties in the same location and condition, and using discount rates that reflect current market assessments of the uncertainty in the amount and timing of the cash flows.
- Sales comparison: The subject property is related at a rate per square metre as a means of comparing evidence. In applying this approach a number of factors are taken into account, such as but not limited to, size, location, zoning, contour, access, development potential / end use, availability of services, profile and exposure, current use of surrounding properties, geotechnical and topographical constraints.

Employee entitlements

Provision is made for benefits accruing to employees in respect of wages and salaries, annual leave, long service leave and sick leave when it is probable that settlement will be required, and they are capable of being measured reliably.

Provisions made in respect of employee benefits expected to be settled within 12 months are measured at their nominal values using the remuneration rate expected to apply at the time of settlement.

Provisions made in respect of employee benefits which are not expected to be settled within 12 months are measured as the present value of the estimated future cash outflows to be made by council in respect of services provided by employees up to reporting date.

Equity

Equity is the community's interest in council and is measured as the difference between total assets and total liabilities. Equity is disaggregated and classified into a number of reserves.

Reserves are a component of equity generally representing a particular use to which various parts of equity have been assigned. Reserves may be legally restricted or created by council.

Restricted and council created reserves

Restricted reserves are those subject to specific conditions accepted as binding by council and which may not be revised by council without reference to the courts or a third party. Transfers from these reserves may be made only for certain specified purposes or when certain specified conditions are met.

Forecast Financial Information

Also included in restricted reserves are reserves restricted by Council decision. Council may alter them without references to any third party or the courts. Transfers to and from these reserves are at the discretion of Council.

Prudence disclosures

The purpose of this statement is to disclose council’s planned financial performance in relation to various benchmarks to enable the assessment of whether council is prudently managing its revenues, expenses, assets, liabilities, and general financial dealings.

The council is required to include this statement in its Annual Plan in accordance with the Local Government (Financial Reporting and Prudence) Regulations 2014 (the regulations). Refer to the regulations for more information, including definitions of some of the terms used in this statement.

Benchmark		Planned	Met
Rates affordability benchmark			
• Income	Total rates will not exceed 60% of Operating Revenue	50.20%	Yes
• Increases	Total rates increase will not exceed 14%	5.50%	Yes
Debt affordability benchmark	The quantified limit is that debt cannot exceed 175% of the total revenue	46.20%	Yes
Balanced budget benchmark	Council meets the balanced budget benchmark if its planned revenue equals or is greater than its planned operating expenses	101%	Yes
Essential services benchmark	Council meets the essential services benchmark if its planned capital expenditure on network services equals or is greater than expected depreciation on network services	707%	Yes
Debt servicing benchmark	Planned borrowing costs are equal to or less than 10% of its planned revenue.	4%	Yes

Notes

1. Rates affordability benchmark

(1) For this benchmark,—

- 1
- the council’s planned rates income for the year is compared with a quantified limit on rates contained in the financial strategy included in the council’s long-term plan; and
- 2
- the council’s planned rates increases for the year are compared with quantified limit on rates increases for the year contained in the financial strategy included in the council’s long-term plan.

(2) The council meets the rates affordability benchmark if—

- 1
- its planned rates income for the year equals or is less than each quantified limit on rates; and
- 2
- its planned rates increases for the year equal or are less than each quantified limit on rates increases.

2. Debt affordability benchmark

(1) For this benchmark, the council’s planned borrowing is compared with a quantified limit on borrowing contained in the financial strategy included in the council’s long-term plan.

(2) The council meets the debt affordability benchmark if its planned borrowing is within each quantified limit on borrowing.

3. Balanced budget benchmark

(1) For this benchmark, the council’s planned revenue (excluding development contributions, vested assets, financial contributions, gains on derivative financial instruments, and revaluations of property, plant, or equipment) is presented as a proportion of its planned operating expenses (excluding losses on derivative financial instruments and revaluations of property, plant, or equipment).

(2) The council meets the balanced budget benchmark if its revenue equals or is greater than its operating expenses

4. Essential services benchmark

(1) For this benchmark, the council’s planned capital expenditure on network services is presented as a proportion of expected depreciation on network services.

Forecast Financial Information

(2) The council meets the essential services benchmark if its planned capital expenditure on network services equals or is greater than expected depreciation on network services.

5. Debt servicing benchmark

(1) For this benchmark, the council's planned borrowing costs are presented as a proportion of planned revenue (excluding development contributions, financial contributions, vested assets, gains on derivative financial instruments, and revaluations of property, plant, or equipment).

(2) Because Statistics New Zealand projects Otago's population will grow more slowly than the national population is expected to grow, it meets the debt servicing benchmark if its planned borrowing costs equal or are less than 10% of its planned revenue.

Forecast Financial Information

Rate Funding and Funding Impact Statements

Funding Impact Statement

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
SOURCES OF OPERATING FUNDING			
29,046	General rates, UAGC, and rates penalties	32,143	31,160
35,846	Targeted rates	41,680	37,306
21,991	Subsidies and grants for operating purposes	23,814	25,162
4,364	Fees and charges	4,729	13,621
27,765	Interest and dividends from investments	27,635	27,587
10,136	Local authorities fuel tax, fines, infringement fees, and other receipts	14,279	3,066
129,149	Total operating funding (A)	144,280	137,903
APPLICATIONS OF OPERATING FUNDING			
118,109	Payments to staff and suppliers	132,984	132,095
9,574	Finance costs	7,517	5,464
75	Other operating funding applications	77	0
127,758	Total applications of operating funding (B)	140,578	137,559
1,391	Surplus (deficit) of operating funding (A – B)	3,702	344
SOURCES OF CAPITAL FUNDING			
0	Subsidies and grants for capital expenditure	0	
0	Development and financial contributions	0	
5,000	Increase (decrease) in debt	7,500	24,700
500	Gross proceeds from sale of assets	2,567	5,846
0	Lump sum contributions	0	
0	Other dedicated capital funding	0	
5,500	Total sources of capital funding (C)	10,068	30,546
APPLICATION OF CAPITAL FUNDING			
	Capital expenditure		
0	• to meet additional demand	0	
2,625	• to improve the level of service	1,759	1,211
16,368	• to replace existing assets	10,643	19,345
(12,103)	Increase (decrease) in reserves	1,367	(9,613)
0	Increase (decrease) of investments	0	19,947
6,891	Total applications of capital funding (D)	13,769	30,890
(1,391)	Surplus (deficit) of capital funding (C – D)	(3,702)	(344)
0	Funding balance ((A – B) + (C – D))	(0)	(0)

Forecast Financial Information

Reconciliation of Funding Impact Statement to Statement of Comprehensive Revenue and Expense

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
	Surplus/(Deficit) of operating funding per funding 1,391 impact statement	3,702	344
	ADD/(DEDUCT)		
	(3,302) Depreciation	(3,380)	(3,075)
	1,493 Other Gains/(Losses)	1,274	3,461
	0 Other	0	
	Surplus/(Deficit) from activities per Statement of (418) Comprehensive Revenue and Expense	1,596	730

Funding Impact Statement - Calculation of Rates for the 2025/2026 year

Rating Base Information

The rating base information on the following pages comprises the rating base for the entire Otago region as a whole made up of Central Otago, Dunedin, Clutha, Queenstown Lakes and Waitaki districts.

The rating base for 30 June 2026 is the rating base estimate used for the preparation of this Annual Plan 2025/26. The comparative rating base is for the preceding year ended 30 June 2025 and was used for the rates for the period 2024/25.

Otago Region	Rating base Information for the year ended 30 June 2026	Rating base Information for the year ended 30 June 2025
Total number of rating units	136,202	134,931
Total capital value of rating units	155,863,474,309	154,646,588,059
Total land value of rating units	89,014,470,850	87,500,840,800

Forecast Financial Information

Rates charged on a capital value basis							
Source of funding and activities				Estimated rates payable including GST			
				Capital Value	Capital Value	Capital Value	
Valuation system and basis of calculation	Matters for differentiation	Est. Revenue sought for 2025-26 including GST	\$500,000	\$1,000,000	\$5,000,000		
General rates							
Contributes to all activities of council	Capital value	Where the property is situated	Allocated as:	\$26,875,868			
			Central Otago	\$3,319,756	\$89.16	\$178.32	\$891.60
			Clutha	\$1,849,177	\$88.10	\$176.19	\$880.95
			Dunedin	\$7,494,335	\$83.78	\$167.55	\$837.75
			Queenstown	\$12,616,714	\$86.48	\$172.96	\$864.80
			Waitaki	\$1,595,886	\$88.73	\$177.46	\$887.30
Targeted rates – refer to maps of targeted rating areas							
Flood protection and control works							
Leith flood protection scheme	Capital value	Where the property is situated within the defined scheme area	Allocated as:	\$1,444,846			
			Direct benefit zone	\$722,423	\$212.00	\$424.01	\$2,120.05
			Indirect benefit zone	\$722,423	\$8.40	\$16.79	\$83.95
Lower Taieri flood protection scheme	Capital value	Where the property is situated using approved classifications	Allocated as:	\$1,239,539			
			Lower Taieri Flood Protection WF1	\$352,911	\$712.86	\$1,425.72	\$7,128.60
			Lower Taieri Flood Protection WF2	\$744,885	\$712.86	\$1,425.72	\$7,128.60
			Lower Taieri Flood Protection EF1	\$800	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF2	\$1,032	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF3	\$21	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF4	\$465	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF5	\$3,744	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF6	\$40	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF7	\$1,818	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF8	\$103,855	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF9	\$21,603	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF10	\$8,259	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF12	\$18	\$16.02	\$32.03	\$160.15
			Lower Taieri Flood Protection EF13	\$88	\$16.02	\$32.03	\$160.15

Forecast Financial Information

Rates charged on a capital value basis						
				Estimated rates payable including GST		
Source of funding and activities	Valuation system and basis of calculation	Matters for differentiation	Est. Revenue sought for 2025-26 including GST	Capital Value	Capital Value	Capital Value
				\$500,000	\$1,000,000	\$5,000,000
Lower Clutha flood and drainage scheme	Capital value	Where the property is situated using approved classifications	Allocated as:	\$1,267,626		
			Flood Protection & Drainage A	\$54,923	\$3,855.33	\$7,710.66
			Flood Protection & Drainage B	\$208,941	\$1,530.78	\$3,061.56
			Flood Protection & Drainage C	\$389,863	\$1,445.74	\$2,891.48
			Flood Protection & Drainage D	\$70,196	\$907.12	\$1,814.25
			Flood Protection & Drainage E	\$64,942	\$481.92	\$963.84
			Flood Protection & Drainage F	\$47,435	\$56.70	\$113.39
			Flood Protection & Drainage U1	\$5,740	\$1,530.91	\$3,061.82
			Flood Protection & Drainage U2	\$308,790	\$510.26	\$1,020.52
			Flood Protection & Drainage U3	\$25,491	\$113.39	\$226.78
Flood Protection & Drainage U4	\$91,305	\$85.04	\$170.09			
Tokomairiro drainage scheme	Capital value	Where the property is situated within the defined scheme area	Allocated as:	\$176,561		
			Tokomairiro Drainage A	\$1,899	\$87.70	\$175.41
			Tokomairiro Drainage B	\$5,358	\$87.70	\$175.41
			Tokomairiro Drainage C	\$8,193	\$87.70	\$175.41
			Tokomairiro Drainage D	\$19,689	\$87.70	\$175.41
			Tokomairiro Drainage E	\$21,333	\$87.70	\$175.41
			Tokomairiro Drainage F	\$70,652	\$87.70	\$175.41
			Tokomairiro Drainage U1	\$49,437	\$48.66	\$97.32
River and waterway management						
City and district waterway and river management	Capital value	Where the property is situated	Allocated as:	\$2,861,672		
			Central Otago	\$588,207	\$15.80	\$31.60
			Clutha	\$558,153	\$26.59	\$53.18
			Dunedin	\$305,375	\$3.42	\$6.83
			Waitaki	\$758,386	\$42.16	\$84.33
			Queenstown Lakes	\$651,551	\$4.46	\$8.93
Catchment management rate						
	Capital value	Where the property is situated	Allocated as:	\$6,212,746		
			Central Otago	\$767,410	\$20.61	\$41.22
			Clutha	\$427,464	\$20.36	\$40.73
			Dunedin	\$1,732,424	\$19.36	\$38.73
			Waitaki	\$368,912	\$20.51	\$41.02
			Queenstown Lakes	\$2,916,536	\$19.99	\$39.98

Forecast Financial Information

Rates charged on a capital value basis						
Source of funding and activities	Valuation system and basis of calculation	Matters for differentiation	Est. Revenue sought for 2025-26 including GST	Estimated rates payable including GST		
				Capital Value	Capital Value	Capital Value
				\$500,000	\$1,000,000	\$5,000,000
Transport						
Dunedin passenger transport	Capital value	Where the property is situated within the defined scheme area, and differentiated on basis of land use:	Allocated as:	\$12,322,998		
		Class A		\$3,209,695	\$493.59	\$987.17
		Class A – non-residential	Class B			
		Class B – others	* Dunedin	\$9,045,905	\$131.62	\$263.24
			* Waitaki	\$67,398	\$139.40	\$278.81
						\$1,316.20
						\$1,394.05
Wakatipu passenger transport	Capital value	Where the property is situated within the defined scheme area, and differentiated on basis of land use:	Allocated as:	\$4,050,114		
		Class A		\$966,992	\$83.72	\$167.44
		Class A – non-residential	Class B	\$3,083,122	\$41.86	\$83.72
		Class B – others				\$418.60
Rates charged in a fixed rate basis (per property)						
Source of funding and activities	Valuation system and basis of calculation	Matters for differentiation	Est. Revenue sought for 2025-26 including GST	Estimated rates payable including GST		
Uniform Annual General Charge						
Contributes to all activities of council	Fixed charge per rating unit		Calculated as \$x per rating unit	\$8,958,622	\$73.48	\$73.48
Wilding trees	Fixed charge per rating unit		Calculated as \$xper rating unit	\$293,825	\$2.41	\$2.41
Emergency management	Fixed charge per rating unit		Calculated as \$x per rating unit	\$4,600,078	\$37.73	\$37.73
Navigational safety	Fixed charge per rating unit	Charged to all district excluding Queenstown Lakes who have a separate harbourmaster service.	Calculated as \$x per rating unit	\$1,016,003	\$11.18	\$11.18

89

Forecast Financial Information

Effect of Rating

2024/25 LTP \$000s		2025/26 LTP \$000s	2025/26 Annual Plan \$000s
29,046	General Rates	32,143	31,160
	Targeted Rates		
5,916	Catchment Management Rate	9,272	5,402
210	Farm Monitoring rate	291	0
3,730	Emergency Management rate	4,018	4,000
250	Wilding Pines rate	257	256
4,332	Biosecurity	4,871	4,899
839	Harbour Management	892	883
	Targeted River Management rates		
498	Central Otago	516	511
443	Clutha	491	485
228	Dunedin	268	266
509	Whakatipu/Wanaka	572	567
627	Waitaki	666	659
	Targeted Transport rates		
9,559	Dunedin Public Transport	10,727	10,716
3,707	Whakatipu Public Transport	3,572	3,522
49	Ōamaru Public Transport	105	0
	Targeted Flood and Drainage rates		
1,256	Leith Flood Protection	1,256	1,256
1,034	Lower Clutha Flood Protection & Drainage	1,100	1,102
1,044	Lower Taieri Flood Protection	1,099	1,073
828	West Taieri Drainage	868	869
646	East Taieri Drainage	684	685
140	Tokomairiro Drainage	153	154

Schedule of Fees and Charges

Scale of Charges

The following scale of charges is to be applied where indicated to activities included in this Schedule of Fees and Charges.

Charge	From 1 July 2024	From 1 July 2025
Staff time per hour:		
• Management	\$215	\$215
• Team Leader/Principal	\$195	\$195
• Senior Technical	\$175	\$175
• Technical	\$150	\$150
• Field Staff	\$150	\$150
• Administration	\$115	\$115
• Specialist Expert Services. For example: Science, Hazards or Engineering time.	\$175	\$175
Disbursements	Actual	Actual
Additional Site Notice	Actual	Actual
Advertisements	Actual	Actual
Vehicle use per kilometre	As per IRD Published Rates	As per IRD Published Rates
Harbourmaster vessel per hour	\$395	\$395
Travel and accommodation	Actual	Actual
Testing charges	Actual	Actual
Consultants	Actual	Actual
Commissioners	Actual	Actual
Councillor Hearing fees per hour:		
• Chairperson	\$100	\$116
• Members	\$80	\$93
• Expenses	Actual	Actual

Resource Management Act – Section 36 Charges

Set out below are details of the amounts payable for those activities to be funded by fees and charges, as authorised by Section 36(1) of the Resource Management Act 1991 (RMA).

Resource Consent Application Fees

Note that the fees shown below are a deposit to be paid on lodgement of a consent application and applications for exemptions in respect of water measuring devices. The deposit will not usually cover the full cost of processing the application, and further actual and reasonable costs are incurred at the rate shown in the scale of charges. GST is included in all fees and charges. Costs for applications are typically invoiced at the end of process.

Pre-application Work

We offer a pre-application service to help customers. The first 30 minutes of pre-application advice or review of application documents is free of charge. We will always advise before we start charging for application advice. For larger pre-application projects we may invoice before, during, and after the process is complete. Fees payable for pre-application work carried out before a consent application is lodged with council will be incurred at the rates shown in the scale of charges.

Forecast Financial Information

Deposits		From 1 July 2024	From 1 July 2025
Publicly Notified Deposits:³		\$25,000	\$25,000
Non-Notified and Limited Notification Deposits:³			
	First consent	\$3,000	\$3,000
	Subsequent consents	\$100	\$200
Other Application Types			
	Variation to Conditions – s127	\$3,000	\$3,000
Fixed Fees			
	Single Bore	\$1,365	\$1,365
	Single farm dairy effluent storage and discharge to land	None	\$5,000
	Single dairy effluent discharge to land	None	\$3,500
	Small scale contaminated land disturbance	None	\$3,500
	Exemption under regulation 7A of the Water Metering Regulations	\$250	\$250
	Exemption under regulations 9 or 10 of the Water Metering Regulations	\$600	\$600
	Transfer consent holder and certificate	\$200	\$200
Hearings			
	Hearings	Per Note 2 below	Per Note 2 below
	Payment for Commissioner request – s100A	Per Note 4 below	Per Note 4 below
Objections			
	Payment for Commissioner request – s357AB	Per Note 4 below	Per Note 4 below
Transfer of Consent Holder and Certificates Deposits:			
	Priority Table	\$200	\$200
	Certificate of Compliance	\$2,000	\$2,000
	All Other Costs	As per Scale of Charges	As per Scale of Charges

Notes:

- For additional permits in respect of the same site, activity, applicant, time of application and closely related effect as the first application. Applications for more than one activity require an additional deposit for each activity. The \$200 deposit is required for each additional activity applied for in an application this deposit amount includes a one-off compliance administration fee of \$100
- An interim invoice of costs to date in addition to a deposit payable shall be 90% of the cost of a hearing as calculated by council in accordance with information contained in the application file and using the scale of charges. The amount payable will be due at least 10 working days before the commencement of the hearing. If the amount is not paid by the due date, then the council reserves the right under S36(7) of the Resource Management Act to stop processing the application. This may include cancellation of the hearing.
 - Should a hearing be cancelled or postponed due to the non-payment of the charge, the applicant will be invoiced for any costs that arise from that cancellation or postponement
 - Following completion of the hearing process, any shortfall in the recovery of hearing costs will be invoiced, or any over-recovery will be refunded to the applicant

Forecast Financial Information

- 3 Where actual and reasonable costs are less than the deposit paid, a refund will be given.
- 4 Where an applicant requests under s100A (for a consent hearing) or under s357AB (for the hearing of an objection) an independent commissioner(s); the applicant will be required to pay any increase in cost of having the commissioner(s).

Use of consultants for resource consents

If ORC uses an external consultant for the processing of a consent, or to provide technical input into the application, then the full actual and reasonable costs of the consultant are charged to the applicant. This may include instances where the applicant makes a request for urgency, the application involves complex and/or technical matters or a peer review is necessary. ORC will also charge the applicant for time spent managing the consultant. ORC will advise the applicant before engaging a consultant.

If ORC uses a consultant to commission a report under section 92(2) of the RMA, the full cost of the consultant is charged to the applicant.

Review of Consent Conditions

Following the granting of a consent, a subsequent review of consent conditions may be carried out at either the request of the consent holder, or as authorised under Section 128, as a requirement of Council. Costs incurred in undertaking reviews requested by the consent holder will be payable by the consent holder at the rates shown in the Scale of Charges above

Reviews initiated by Council will not be charged to consent holders.

Forecast Financial Information

Compliance Monitoring

Performance Monitoring

The following charges will apply to the review of performance monitoring reports for all consent holders, except those listed in 'fees for specific consent holders' section below. The charges shown are annual fixed fees per performance monitoring report or plan and are inclusive of GST.

Resource Consent Monitoring and Annual Administration Charges	From 1 July 2024	From 1 July 2025
One-off compliance administration fee to be charged on all new applications. Covers the cost of compliance monitoring systems. This is included in the consent deposit and fixed fees above and only to be charged if a deposit or fixed fee is not paid.	\$180	\$180
One off compliance set up fee to be charged on all new applications (subsequent consents) covers the cost of compliance monitoring systems. This is included in the consent deposit and fixed fees above and only to be charged if a deposit or fixed fee is not paid.	\$100	\$100
Ongoing compliance administration fee to be charged on consents with Performance Monitoring requirements.	\$60	\$62
Late performance monitoring fee to be charged as required.	\$180	\$180
Annual Consent Compliance Monitoring Charges		
Compliance monitoring charge for each other item due during the financial year (unless covered by one of the fees below). Examples include management plans, provision of photos, bore logs, notifications, record of complaints, annual reports.	\$85	\$87
Annual charge for the receipt and processing of telemetered water take data/information (including verifications returns).	\$220	\$230
Each additional telemetered water measuring device.	\$60	\$62
Annual charge for the receipt and processing of manual and data logger water take data/information (including verification returns), excludes those who hold a WEX for the installation of telemetry.	\$280	\$290
Each additional non telemetered water measuring device	\$120	\$125
Annual charge for the receipt and processing of all returns relating to small/simple discharge consents.	\$100	\$102
Annual charge for the receipt and processing of all returns relating to medium/moderately complex discharge consents.	\$375	\$390
Annual charge for the receipt and processing of all returns relating to large/complex discharge consents.	\$1,100	\$1,145
Annual charge for the receipt and processing of all returns relating to simple/small earthworks consents.	\$325	\$335
Annual charge for the receipt and processing of all returns relating to standard/medium earthworks consents.	\$1,050	\$1,075
Annual charge for the receipt and processing of all returns relating to complex/large earthworks consents. Very large developments may be set up as major clients.	\$2,200	\$2,250
Inspection reports for small dams	\$175	\$175
Inspection reports for large dams	\$340	\$340
Structural integrity report	\$120	\$125
CMA Structure Permit (Annual Charge)	\$30	\$30
Low Flow Monitoring Charges		

Forecast Financial Information

Kakanui at McCones	\$400	\$410
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Fees for Specific Consent Holders

Performance monitoring will be charged as 100% of actual costs where applying the fixed charges listed above do not represent a fair and reasonable charge.

This includes major consent holders who hold a large number of individual consents and/or consents which contain complex monitoring requirements. It also includes consents where data or information is consistently submitted in a way which generates significant extra costs for council.

Additional charges may be incurred for new consents granted during the year.

Resource Consent Monitoring

Resource consent audits

Audits and site inspections for monitoring consents will be as follows:

Resource Consent Monitoring audit fee	From 1 July 2024	From 1 July 2025
Coastal permit – structure	\$250	\$300
Coastal permit – mooring	\$200	\$250
Bore inspection	\$350	\$400
Small/simple on-site waste water discharge consent	\$350	\$450
Dairy Audit fee per inspection	New	\$500

All other audits of resource consents will be charged at the actual and reasonable cost incurred using the scale of charges. This includes, but is not limited to:

- Staff time to carry out an inspection (including travel), assess any information provided by consent holders, report back to consent holders and follow up any non-compliance (if required).
- Any disbursements related to the monitoring, including sampling and testing costs and any specialist or technical advice needed.

Resource consent non-compliance

Where non-compliance with resource consent conditions is identified, all follow-up work and enforcement action related to the consent non-compliance will be charged at the scale of charges. For clarification, these costs are additional to the ‘resource consent audit’ costs above.

This includes, but is not limited to:

- Staff time to consider the non-compliance, prepare reports and correspondence, and any disbursements (e.g. sampling services, technical advice) related to consent non-compliance
- Costs for generating and issuing enforcement notices
- Inspections to determine compliance with an enforcement order or abatement notice to confirm that the required action has been taken and full compliance with the notice is achieved
- Reactive site visits as a result of an incident notification (e.g. a complaint about water pollution or odour discharge), the consent holder is only charged if the consent is breached and non-compliance is observed
- Costs for external consultants/contractors (actual charges).

Other compliance activities

The following activities will be charged at the actual and reasonable cost incurred, using the scale of charges:

- Performance and compliance monitoring of permitted activities under a National Environmental Standard, including but not limited to freshwater, plantation forestry and storing tyres outdoors
- Monitoring compliance of farm operators with freshwater farm plan regulations and receiving notifications and audit reports of freshwater farm plans
- Monitoring compliance certificates.

Forecast Financial Information

Non-compliance, incidents and complaints

Pollution Incidents and non-compliance with permitted activity rules

Where non-compliance with the RMA or permitted activity rules in regional plans or National Environment Standards is identified, the actual and reasonable costs and expenses incurred may be charged at the scale of charges. This includes, but is not limited to:

- Dealing with initial response to the pollution incident such as initial enquiries and site visit
- Enforcement work including staff time for investigating, monitoring and reporting and any disbursements (e.g. sampling services and technical advice) related to the non-compliance
- Costs of any actions required to avoid, remedy, or mitigate the adverse environmental effect, including the remediation and clean-up.

Gravel inspection and management

Gravel extraction fee — \$0.66 per cubic metre (incl. GST). Up to a maximum of \$6,600 per consent per year.

Resource monitoring

Water or air monitoring work carried out for external parties — scale of charges.

Private plan changes

Work carried out on privately initiated plan changes — scale of charges.

Building Act 2004 — Section 243 charges

Dam safety and building control

The following table of charges and deposits will apply to the dam safety and building control activity.

Activity	Description	Deposit	2025/26 Fees
Issue of Certification of Acceptance (CoA)	Receive, process and grant or refuse applications for CoA	\$2,000	Scale of Charges plus MBIE/BRANZ levies where applicable*
Project Information Memorandum (PIM) for a Dam	Receive, process and issue PIM applications	-	Scale of Charges
Dam Safety	Dangerous dams, earthquake-prone dams, and flood-prone dams – inspections and enforcement	-	Scale of Charges
	Consider and approve (or refuse) dam classifications	-	Fixed Fee - \$115
	Approve or refuse dam safety assurance programmes	-	Fixed Fee - \$285
	Receive annual dam safety assurance programme compliance certificates	-	Fixed Fee - \$60
Notices to Fix (NTF)	Issue of NTF	-	Scale of Charges
	Inspection(s) of building work under NTF	-	Scale of Charges
Any other activity under the Building Act			Scale of Charges

*Ministry of Business, Innovation and Employment (MBIE) and Building Research Association of New Zealand (BRANZ) levies apply to CoA applications where the estimated value of building work is greater than \$20,000. The Otago Regional Council is required to collect these levies from the applicant on behalf of MBIE and BRANZ. The levies quoted are as required by regulation and may change in accordance with amendments made to regulations.

Biosecurity Act — Section 135 charges

Pest Management Strategy implementation

Work carried out resulting from inaction of landowners not complying with council’s Pest Management Strategy for Otago. The scale of charges applies.

Review of rabbit control programmes from non-compliant farms and work associated with ensuring implementation of those programmes — scale of charges.

Local Government Act — Section 150 charges

Transport licensing exempt services

Apply to register or vary an existing registration — scale of charges; deposit payable of \$575.

Bylaw application processing

Processing bylaw applications with the scale of charges applying and deposit payable of \$300.

Local Government Official Information and Meetings Act — Section 13 and Resource Management Act Section 36(1)

Information requests

Information requests that require more than half an hour to respond to and multiple copies of council reports. The scale of charges applies.

Local Government (Rating) Act 2002 — Section 88 charges

Postponement

A postponement fee to cover administration and financial costs may be charged on postponed rates — scale of charges.



Council Meeting - 25 June 2025



Schedule of Fees and Charges

– from 1 July 2025

Scale of Charges

The following Scale of Charges is to be applied where indicated to activities includes in this Schedule of Fees and Charges.

Charge	From 1 July 2024	From 1 July 2025
Staff time per hour:		
- Management	\$215	\$215
- Team Leader/Principal	\$195	\$195
- Senior Technical	\$175	\$175
- Technical	\$150	\$150
- Field staff	\$150	\$150
- Administration	\$115	\$115
- Specialist Expert Services. For example: Science, Hazards or Engineering time.	\$175	\$175
Disbursements	Actual	Actual
Additional Site Notice	Actual	Actual
Advertisements	Actual	Actual
Vehicle use per kilometre	As per IRD Published Rates	As per IRD Published Rates
Harbourmaster vessel per hour	\$395	\$395
Travel and accommodation	Actual	Actual
Testing charges	Actual	Actual
Consultants	Actual	Actual
Commissioners	Actual	Actual
Councillor Hearing fees per hour:		
- Chairperson	\$100	\$116
- Member	\$80	\$93
- Expenses	Actual	Actual

Resource Management Act – Section 36 Charges

Set out below are details of the amounts payable for those activities to be funded by fees and charges, as authorised by Section 36(1) of the Resource Management Act 1991.

Resource Consent Application Fees

Note that the fees shown below are a deposit to be paid on lodgement of a consent application and applications for exemptions in respect of water measuring devices. The deposit will not usually cover the full cost of processing the application, and further actual and reasonable costs are incurred at the rate shown in the scale of charges. GST is included in all fees and charges. Costs for applications are typically invoiced at the end of process.

Pre-Application Work

We offer a pre-application service to help customers. The first 30 minutes of pre-application advice or review of application documents is free of charge. We will always advise before we start charging for application

advice. For larger pre-application projects we may invoice before, during, and after the process is complete. Fees payable for pre-application work carried out before a consent application is lodged with Council will be incurred at the rates shown in the scale of charges.

Deposits		From 1 July 2024	From 1 July 2025
Publicly Notified Deposits:³		\$25,000	\$25,000
Non-Notified and Limited Notification Deposits: ³	First consent	\$3,000	\$3,000
	Subsequent consents	\$100	\$200
Other Application Types			
	Variation to Conditions – s127	\$3,000	\$3,000
Fixed Fees			
Single Bore		\$1,365	\$1,365
Single farm dairy effluent storage and discharge to land		None	\$5,000
Single dairy effluent discharge to land		None	\$3,500
Small scale contaminated land disturbance		None	\$3,500
Exemption under regulation 7A of the Water Metering Regulations		\$250	\$250
Exemption under regulations 9 or 10 of the Water Metering Regulations		\$600	\$600
Transfer consent holder and certificate		\$200	\$200
Hearings			
Hearings		Per Note 2 below	Per Note 2 below
Payment for Commissioner request – s100A		Per Note 4 below	Per Note 4 below
Objections			
Payment for Commissioner request – s357AB		Per Note 4 below	Per Note 4 below
Transfer of Consent Holder and Certificates Deposits:			
Priority Table		\$200	\$200
Certificate of Compliance		\$2,000	\$2,000
All Other Costs		As per Scale of Charges	As per Scale of Charges

Notes:

1. For additional permits in respect of the same site, activity, applicant, time of application, and closely related effect as the first application. Applications for more than one activity require an additional deposit for each activity. The \$200 deposit is required for each additional activity applied for in an application this deposit amount includes a one-off compliance administration fee of \$100.
2. An interim invoice of costs to date in addition to a deposit payable shall be 90% of the cost of a hearing as calculated by Council in accordance with information contained in the application file and using the scale of charges. The amount payable will be due at least 10 working days before the commencement of the hearing. If the amount is not paid by the due date, then the Council reserves the right under S36(7) of the Resource Management Act to stop processing the application. This may include cancellation of the hearing.
 - i. Should a hearing be cancelled or postponed due to the non-payment of the charge, the applicant will be invoiced for any costs that arise from that cancellation or postponement.
 - ii. Following completion of the hearing process, any shortfall in the recovery of hearing costs will be invoiced, or any over recovery will be refunded to the applicant
3. This deposit is to be paid as the initial deposit if you request public notification when your application is lodged with Council, or when there is a decision made to publicly notify your

application. This is as well as the other costs associated with notified applications. Where actual and reasonable costs are less than the deposit paid, a refund will be given.

4. Where an applicant requests under s100A (for a consent hearing) or under s357AB (for the hearing of an objection) an independent commissioner(s); the applicant will be required to pay any increase in cost of having the commissioner(s).

Use of Consultants for resource consents

If ORC uses an external consultant for the processing of a consent, or to provide technical input into the application then the full actual and reasonable costs of the consultant is charged to the applicant. This may include instances where the applicant makes a request for urgency, the application involves complex and/or technical matters or a peer review is necessary. ORC will also charge the applicant for time spent managing the consultant. ORC will advise the applicant before engaging a consultant.

If ORC uses a consultant to commission a report under section 92(2) of the RMA, the full cost of the consultant is charged to the applicant.

Review of Consent Conditions

Following the granting of a consent, a subsequent review of consent conditions may be carried out at either the request of the consent holder, or as authorised under Section 128, as a requirement of Council. Costs incurred in undertaking reviews requested by the Consent Holder, or as authorised under Section 128 will be payable by the Consent Holder at the rates shown in the Scale of Charges above.

Compliance Monitoring

Performance Monitoring

The following charges will apply to the review of performance monitoring reports for all consent holders, except those listed in ‘Fees for Specific Consent Holders’ section below. The charges shown are annual fixed fees per performance monitoring report or plan, and are inclusive of GST.

Resource Consent Monitoring and Annual Administration Charges	From 1 July 2024	From 1 July 2025
One off compliance set up fee to be charged on all new applications 1 st consent. Covers the cost of compliance monitoring systems. <i>This is included in the consent deposit and fixed fees above and only to be charged if a deposit or fixed fee is not paid.</i>	\$180	\$180
One off compliance set up fee to be charged on all new applications (subsequent consents) covers the cost of compliance monitoring systems. <i>This is included in the consent deposit and fixed fees above and only to be charged if a deposit or fixed fee is not paid.</i>	\$100	\$100
Ongoing compliance management fee to be charged on consents with Performance Monitoring requirements.	\$60	\$62
Late performance monitoring fee to be charged as required.	\$180	\$180
Annual Consent Compliance Monitoring Charges		
Compliance monitoring charge for each other item due during the financial year (unless covered by one of the fees below) examples include management plans, provision of photos, bore logs, notifications, record of complaints, annual reports.	\$85	\$87
Annual charge for the receipt and processing of telemetered water take data/information (including verifications returns)	\$220	\$230
Each additional telemetered water measuring device	\$60	\$62
Annual charge for the receipt and processing of manual and data logger water take data/information (including verification returns), excludes those who hold a WEX for the installation of telemetry.	\$280	\$290

Each additional non telemetered water measuring device	\$120	\$125
Annual charge for the receipt and processing of all returns relating to small/simple discharge consents.	\$100	\$102
Annual charge for the receipt and processing of all returns relating to medium/moderately complex discharge consents.	\$375	\$390
Annual charge for the receipt and processing of all returns relating to large/complex discharge consents.	\$1,100	\$1,145
Annual charge for the receipt and processing of all returns relating to simple/small earthworks consents.	\$325	\$335
Annual charge for the receipt and processing of all returns relating to standard/medium earthworks consents.	\$1,050	\$1,075
Annual charge for the receipt and processing of all returns relating to complex/large earthworks consents. Very large developments may be set up as major clients.	\$2,200	\$2,250
Inspection reports for small dams (RMA Consents)	\$175	\$175
Inspection reports for large dams (RMA Consents)	\$340	\$340
Structural integrity report	\$120	\$125
CMA Structure Permit (Annual Charge)	\$30	\$30
Low flow monitoring charges		
Kakanui at McCones	\$400	\$410

Fees for Specific Consent Holders

Performance monitoring will be charged as 100% of actual costs where applying the fixed charges listed above do not represent a fair and reasonable charge. This includes major consent holders who hold a large number of individual consents and/or consents which contain complex monitoring requirements. It also includes consents where data or information is consistently submitted in a way which generates significant extra costs for Council.

Additional charges may be incurred for new consents granted during the year.

Resource consent monitoring

Resource consent audits

Audits and site inspections for monitoring consents will be as follows:

Resource Consent Monitoring audit fee¹	From 1 July 2024	From 1 July 2025
Coastal permit – structure	\$250	\$300
Coastal permit – mooring	\$200	\$250
Bore inspection	\$350	\$400
Small/simple on-site waste water discharge consent	\$350	\$450
Dairy Audit fee per inspection (note - to cover and replace dairy targeted rate)	NEW	\$500

¹ costs are charged on a per consent basis.

All other audits of resource consents will be charged at the actual and reasonable cost incurred using the Scale of Charges. This includes, but is not limited to:

- Staff time to carry out an inspection (including travel), assess any information provided by consent holders, report back to consent holders and follow up any non-compliance (if required).
- Any disbursements related to the monitoring, including sampling and testing costs and any specialist or technical advice needed.

Resource consent non-compliance

Where non-compliance with resource consent conditions is identified, all follow-up work and enforcement action related to the consent non-compliance will be charged at the Scale of Charges. For clarification, these costs are additional to the 'resource consent audit' costs above.

This includes, but is not limited to:

- Staff time to consider the non-compliance, prepare reports and correspondence, and any disbursements (eg sampling services, technical advice) related to consent non-compliance.
- Costs for generating and issuing enforcement notices.
- Inspections to determine compliance with an enforcement order or abatement notice to confirm that the required action has been taken and full compliance with the notice is achieved.
- Reactive site visits as a result of an incident notification (eg a complaint about water pollution or odour discharge), the consent holder is only charged if the consent is breached and non-compliance is observed.
- Costs for external consultants/contractors (actual charges)

Other Compliance Activities

The following activities will be charged at the actual and reasonable cost incurred, using the Scale of Charges:

- Performance and compliance monitoring of permitted activities under a National Environmental Standard, including but not limited to Freshwater, Commercial Forestry and Storing Tyres Outdoors.
- Monitoring compliance of farm operators with freshwater farm plan regulations and receiving notifications and audit reports of freshwater farm plans
- Monitoring Compliance Certificates.

Non-Compliance, Incidents and Complaints

Pollution incidents and non-compliance with permitted activity rules

Where non-compliance with the RMA or permitted activity rules in Regional Plans or National Environment Standards is identified, the actual and reasonable costs and expenses incurred may be charged at the Scale of Charges. This includes, but is not limited to:

- Dealing with initial response to the pollution incident such as initial enquiries and site visit.
- Enforcement work including staff time for investigating, monitoring and reporting and any disbursements (eg , sampling services and technical advice) related to the non-compliance.
- Costs of any actions required to avoid, remedy, or mitigate the adverse environmental effect, including the remediation and clean-up

Gravel Inspection and Management

Gravel extraction fee – \$0.66 per cubic metre. Up to a maximum of \$6,600 per consent per year.

Resource Monitoring

Water or air monitoring work carried out for external parties – Scale of Charges.

Private Plan Changes

Work carried out on privately initiated plan changes – Scale of Charges.

Building Act 2004 – Section 243 Charges

Dam Safety and Building Control

The following table of charges and deposits will apply to the Dam Safety and Building Control activity.

Activity	Description	Deposit	From 1 July 2024	From 1 July 2025
Issue of Certification of Acceptance (CoA)	Receive, process and grant or refuse applications for CoA	\$2,000	Scale of Charges plus MBIE/BRANZ levies where applicable*	Scale of Charges plus MBIE/BRANZ levies where applicable*
Project Information Memorandum (PIM) for a Dam	Receive, process and issue PIM applications	-	Scale of Charges	Scale of Charges
Dam Safety	Dangerous dams, earthquake - prone dams, and flood-prone dams – inspections and enforcement	-	Scale of Charges	Scale of Charges
	Consider and approve (or refuse) dam classifications	-	Fixed Fee - \$115	Fixed Fee - \$115
	Approve or refuse dam safety assurance programmes	-	Fixed Fee - \$285	Fixed Fee - \$285
	Receive annual dam safety assurance programme compliance certificates	-	Fixed Fee - \$60	Fixed Fee - \$60
Notices to Fix (NTF)	Issue of NTF	-	Scale of Charges	Scale of Charges
	Inspection(s) of building work under NTF	-	Scale of Charges	Scale of Charges
Any other activity under the Building Act		-	Scale of Charges	Scale of Charges

*Ministry of Business, Innovation and Employment (MBIE) and Building Research Association of New Zealand (BRANZ) levies apply to COA applications where the estimated value of building work is greater than \$20,000. The Otago Regional Council is required to collect these levies from the applicant on behalf of MBIE and BRANZ. The levies quoted are as required by regulation and may change in accordance with amendments made to regulations.

Biosecurity Act – Section 135 Charges

Pest Management Strategy Implementation

Work carried out resulting from inaction of landowners not complying with Council’s Pest Management Strategy for Otago. The ‘Scale of Charges’ applies.

Review of Rabbit Control Programmes from non-compliant farms, and work associated with ensuring implementation of those programmes – Scale of Charges.

Local Government Act – Section 150 Charges

Transport Licensing Exempt Services

Apply to register or vary an existing registration - Scale of Charges; deposit payable of \$575.

Bylaw Application Processing

Processing bylaw applications with the ‘Scale of Charges’ applying and deposit payable of \$300.

Local Government Official Information and Meetings Act – Section 13 and Resource Management Act Section 36(1)

Information Requests

Information requests that require more than half an hour to respond to, and multiple copies of Council reports. The ‘Scale of Charges’ applies.

Local Government (Rating) Act 2002 – Section 88 Charges

Postponement

A postponement fee to cover administration and financial costs may be charged on postponed rates – scale of charges.

10.3. Rates Report and Rates Resolution

Prepared for:	Council
Report No.	CS2522
Activity:	Governance Report
Author:	Sarah Munro, Finance Manager - Reporting
Endorsed by:	Nick Donnelly, General Manager Finance
Date:	25 June 2025

PURPOSE

- [1] The purpose of this report is to provide details of each of the rates to be set, and to recommend that Council adopts the rates resolution for the 2025-2026 financial year.

EXECUTIVE SUMMARY

- [2] Following the adoption of the Annual Plan 2025-2026, Council is required to adopt a rates resolution, which formally sets the rates for the 2025-2026 financial year.
- [3] The rates resolution is attached to this report.
- [4] A table is attached to this report showing the rates effect of the rates contained in the rating resolution on a range of properties within the Otago region. The table includes rates for the 2024-2025 year for comparative purposes.

RECOMMENDATION

That the Council:

- 1) **Receives** this report and the attached 2025-2026 Rating Resolution examples report.
- 2) **Adopts** the Rating Resolution for the 2025-2026 financial year.

DISCUSSION

GENERAL RATES

- [5] The GST inclusive general rate requirement for the 2025-2026 year of \$35,834,000 represents an increase of 7.3% on the 2024-2025 rate of \$33,403,000.
- [6] Of the general rate requirement, the total amount of rates to be collected by way of Uniform Annual General Charge is \$8,959,000 equating to a charge of \$73.48 (including GST) on each rateable property compared to \$69.36 in the 2024-25 year.
- [7] General rates, excluding the portion collected as a Uniform Annual General Charge, are charged on a capital value basis.

Equalisation of Capital Values

- [8] Revaluations of property for rating purposes are conducted on a cyclic three-yearly basis.

- [9] The Queenstown District was revalued in the current rating year 2024-2025. The Waitaki and Clutha Districts were reviewed in the prior rating year 2024-2023. Dunedin City and the Central Otago Districts revaluation was carried out in 2023-2022.
- [10] Council obtained a certificate of projected values from Quotable Value Limited that provides an assessment of the overall “equalised” capital values of the city and each of the districts within Otago, as at the common date of 1 September 2024.
- [11] The equalised values are applied to apportion the general rate amount to be collected on a capital value basis from the region as a whole and are also applied in those instances where rates are to be collected on a common basis where the rating base takes in more than one district.
- [12] The following table shows the equalised values for the city and districts as at 1 September 2024 that are applicable for 2025-2026 rates and the comparative equalised values applicable to the 2024-2025 rates.

Equalised capital values of Otago region				
	Value for the 2025/2026 year		Value for the 2024/2025 year	
City/District	Value \$billion	District %	Value \$billion	District %
Central Otago	18.923	12.33%	18.360	12.83%
Clutha	10.669	6.95%	8.810	6.16%
Dunedin	43.119	28.10%	41.761	29.19%
Queenstown	71.407	46.53%	66.662	46.59%
Waitaki (part)	9.337	6.08%	7.480	5.23%
Total	153.455	100.00%	143.073	100.00%

Significant General Rate Amounts

- [13] The following are the significant general rate amounts to be levied on the basis of capital value:

	General Rates 2025/2026 (GST Inclusive) \$	General Rates 2024/2025 (GST Inclusive) \$
Contact Energy Limited:		
Clyde Hydro Dam	126,540	122,839
Roxburgh Hydro Dam	61,942	60,130
Dunedin Waste Water Business Unit:		
Three major facilities	156,236	149,942
Total	344,718	332,911
Percentage of total general rates	0.96%	1.00%

- [14] The amount of general rate to be collected from these ratepayers, and the percentage of these rates in relation to the total general rate, is not considered unreasonable given the effects of the presence and operations of these properties.

RIVER AND WATERWAY MANAGEMENT RATES

- [15] The targeted rates to be levied for the purposes of maintenance and enhancement of rivers and waterways within the territorial authority city/districts and within the Lower Waitaki river area are as follows:

River and waterway management rates (inclusive of GST)		
Rating Area	2025/2026 \$	2024/2025 \$
Central Otago District	588,207	572,295
Clutha District	558,153	509,312
Dunedin City	305,375	262,627
Queenstown-Lakes District	651,551	585,882
Waitaki District	758,386	721,128
Total	2,861,672	2,651,244

- [16] River and waterway management rates are assessed differentially on the rateable capital value of all rateable land situated within the territorial authority city/districts.

FLOOD AND DRAINAGE SCHEME RATES

- [17] The targeted rating levels for the various flood protection and drainage scheme rating districts are as follows:

Flood and drainage scheme rates (inclusive of GST)		
Targeted Rating district	2025/2026 \$	2024/2025 \$
Rates charged on a capital value basis:		
Lower Taieri Flood	1,233,478	1,200,659
Lower Clutha Flood and drainage	1,267,626	1,189,523
Tokomairiro Drainage	176,560	161,346
Leith Flood protection	1,444,846	1,444,845
Rates charged on an area basis:		
West Taieri Drainage	999,884	951,671
East Taieri Drainage	787,956	742,768
Total	5,910,350	5,673,858

- [18] These rates are levied on either a classified or differentially targeted basis in accordance with assessed benefits.

Lower Taieri

- [19] The total rate requirement for Lower Taieri is set on the capital value within each of the relevant classifications. The Lower Taieri Scheme has 2 differentials. WF1 and WF2 mapping area is in one differential paying 89% of the rate requirement. The second differential is EF1 – EF10, EF12 and EF13 mapping area paying 11% of the rate requirement.

Tokomairiro Schemes

- [20] The total rate requirement for Tokomairiro is set on the capital value within each of the relevant classifications. The Tokomairiro Scheme has 2 differentials. Tokomairiro A to F

mapping area is in one differential paying 72% of the rate requirement. The second differential is Tokomairiro U1 mapping area paying 28% of the rate requirement.

Leith Flood Protection

- [21] This rate is set on a capital value basis comprising two classifications, the Direct Benefit Zone and the Indirect Benefit Zone. The Direct Benefit Zone is a mapped area that contributes 50% of the rate requirement. The remaining 50% rate requirement is attributed to the Indirect Benefit Zone which includes all properties in the Dunedin City area excluding those in the Direct Benefit Zone.

Lower Clutha

- [22] The total rate requirement for this scheme is set on the capital value within each of the 10 relevant mapped area classifications.

West Taieri Drainage

- [23] This rate is set on an area basis within a defined mapped area. All mapped areas of the scheme WD1 – WD5 pay the same differential.

East Taieri Drainage

- [24] This rate is set on an area basis within a defined mapped area. All mapped areas of the scheme ED1, ED2, ED4, ED5, ED7- ED10 pay the same differential.

DUNEDIN TRANSPORT RATE

- [25] The Dunedin transport services targeted rate is to be levied on two classifications of ratepayer, Class A and Class B.

- [26] Class A ratepayers are made up of those properties within the inner city and St Kilda/St Clair areas that do not have a land use description of any of the following:

- Residential: bach,
- Residential: multi-use within residential, multi-use residential,
- Residential: multi-unit,
- Residential: single unit excluding bach,
- Residential: vacant, and
- MU: Residential.

- [27] Class B comprises all properties within the transport services targeted rating area other than those designated as Class A. Class A ratepayers will pay a differential rate equating to 3.75 times the amount paid by Class B ratepayers.

- [28] Dunedin Transport rates to be levied are as follows:

Dunedin Transport Rate (inclusive of GST)		
Classification	2025/2026 \$	2024/2025 \$
Class A	3,209,650	2,869,388
Class B	9,113,348	8,123,494
Total	12,322,998	10,992,882

QUEENSTOWN TRANSPORT RATE

[29] The Queenstown transport services targeted rate is to be levied on two classifications of ratepayer, Class A and Class B. Class A ratepayers will pay a differential rate equating to 2.0 times the amount paid by Class B ratepayers.

[30] Class A ratepayers are made up of those properties within the Queenstown Transport Services Rating Area that have the land use description of:

- Commercial: Retail, Multi-use within Commercial, and Services,
- Community Services: Multi-use within Community Services,
- Multi-use: Commercial,
- Residential: Public Communal-licensed, and Public Communal-unlicensed,
- Transport: Air Transport, and Multi-use within Transport, and
- Recreational: Entertainment, Multi-use within recreational, Active indoor, Active outdoor, Passive indoor, and Passive outdoor.

[31] Class B comprises all properties within the Queenstown Transport Services rating area other than those designated as Class A.

[32] The Queenstown transport rates to be levied are as follows:

Queenstown Transport Rate (inclusive of GST)		
Classification	2025/2026 \$	2024/2025 \$
Class A	966,992	1,078,296
Class B	3,083,122	3,184,967
Total	4,050,114	4,263,263

WILDING TREE RATE

[33] The Wilding Tree rate will be levied on a targeted uniform basis on all rateable land situated within the Otago region.

[34] The GST inclusive rate requirement of \$293,825 for the 2025-2026 year represents an increase of 2.20% on the amount of \$287,495 levied in the 2024-2025 period.

CIVIL DEFENCE AND EMERGENCY MANAGEMENT RATE

[35] The Civil Defence and Emergency Management rate will be levied on a targeted uniform basis on all rateable land situated within the Otago region.

[36] The GST inclusive rate requirement of \$4,600,078 for the 2025-2026 year represents an increase of 7.24% on the amount of \$4,289,646 levied in the 2024-2025 period.

NAVIGATIONAL SAFETY RATE

- [37] The Navigation safety rate will be levied on a targeted uniform basis on all rateable land situated within the Otago region with the exclusion of land in Queenstown Lakes District.
- [38] The GST inclusive rate requirement of \$1,016,003 for the 2025-2026 year represents an increase of 5.34% on the amount of \$964,494 levied in the 2024-2025 period.

CATCHMENT MANAGEMENT RATE

- [39] The Catchment management rate is to fund Council's biodiversity, land and water implementation, water quality remediation and integrated catchment management activities. It will be assessed differentially on the rateable capital value of all rateable land situated within the territorial authority city/districts.

Catchment Management Rates (inclusive of GST)		
Classification	2025/2026 \$	2024/2025 \$
Central Otago	767,410	860,003
Clutha	427,464	483,268
Dunedin	1,732,424	1,940,385
Queenstown	2,916,536	3,107,412
Waitaki (part)	368,912	412,674
Total	6,212,745	6,803,472

BIOSECURITY RATE

- [40] The Biosecurity rate is to fund the management of pest plants and animals. It will be assessed differentially on the rateable land value of all rateable land situated within the territorial authority city/districts.

Biosecurity Rates (inclusive of GST)		
Classification	2025/2026 \$	2024/2025 \$
Central Otago	662,381	609,154
Clutha	429,773	395,097
Dunedin	1,474,988	1,346,404
Queenstown	2,754,184	2,343,180
Waitaki (part)	313,078	287,807
Total	5,634,403	4,981,642

OAMARU TRANSPORT RATE

- [41] In the prior year a rate of \$56,350 Oamaru transport services targeted rate was charged on a targeted uniform basis on all rateable land. This rate is not being charged in the current year.

DAIRY MONITORING RATE

- [42] In the prior year a Dairy Monitoring rate of \$241,500 was levied on a targeted uniform basis on all rateable land, situated within the Otago region that operates a Dairy Farm. This rate is not being charged in the current year.

Due Date and Penalties

- [43] The attached resolution provides that the due date for rates to be paid is 31 October 2025.

- [44] It also provides for penalty dates in November 2025 and May 2026 as follows:

- A 10% penalty will apply to all unpaid rates on 1 November 2025.
- A 10% penalty will apply to all rates levied in previous financial years remaining unpaid on 1 May 2026.

Direct Debit Payment Methods

- [45] Direct debit payment options do not incur a late payment penalty and allow ratepayers to pay rates during the 2025-2026 rating period. Direct debit payment methods include annual, weekly, fortnightly and monthly.

Financial Considerations

- [46] Financial considerations associated with this report have been reported separately as part of the Annual Plan 2025-2026 adoption process.

Significance and Engagement

- [47] Consultation on these rates requirements was undertaken as part of the Long-Term Plan 2024-2034 consultation process with feedback submitted and considered as part of that process. Recommendations were made in regard to rate requirements and the details in the rates resolution reflect the amounts agreed.

Legislative and Risk Considerations

- [48] The Otago Regional Council sets its rates in accordance with the requirements of the Local Government (Rating) Act 2002 - Sections 23 and 24, and the Local Government Act 2002.

Climate Change Considerations

- [49] There are no climate change considerations associated with this report.

Communications Considerations

- [50] There are no communications considerations associated with this report.

ATTACHMENTS

1. Rating Resolution for Adoption 202526 [**10.3.1** - 7 pages]
2. 2025 2026 Rating Resolution examples V 2 [**10.3.2** - 14 pages]

Rating Resolution for Adoption

That in accordance with the provisions of the Local Government (Rating) Act 2002, the Otago Regional Council Annual Plan 2025-2026, and all other power or authorities in that behalf enabling it, the Otago Regional Council sets the following rates for the period commencing on the 1st day of July 2025 and ending on the 30th day of June 2026, namely:

1. General Rates

A Uniform Annual General Charge set under section 15 of the Local Government (Rating) Act 2002 made on every rating unit within the Otago region, assessed as a fixed amount of \$73.48 per rating unit. Revenue sought from the Uniform Annual General Charge amounts to \$8,958,622 (including GST).

A general rate set under sections 13 and 14 of the Local Government (Rating) Act 2002 made on every rating unit within the Otago region, assessed differentially on the rateable capital value of all rateable land situated within the territorial authority districts as detailed below:

District	Rate in \$ on Capital Value	Revenue sought \$
Central Otago	0.00017832	3,319,756
Clutha	0.00017619	1,849,177
Dunedin	0.00016755	7,494,335
Queenstown Lakes	0.00017296	12,616,714
Waitaki	0.00017746	1,595,886
Total		\$26,875,868

2. River and Waterway Management Rates

2.1 Territorial Authority Districts

For the purpose of providing for maintenance and enhancement works of waterways within the Otago region, a targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit, assessed differentially on the rateable capital value of all rateable land situated within the territorial authority districts and the Wakatipu and Wanaka river and waterway management rating districts, as detailed below:

District	Rate in \$ on Capital Value	Revenue sought \$
Central Otago District	0.00003160	588,207
Clutha District	0.00005318	558,153
Dunedin City	0.00000683	305,375
Waitaki District	0.00008433	758,386
Queenstown Lakes District	0.00000893	651,551
Total		2,861,672

3. Flood Protection and Drainage Scheme Rates

3.1 Lower Clutha, Tokomairiro and Lower Taieri Schemes

For the purpose of providing for the maintenance and improvement of works, in the river and drainage schemes listed below, a targeted rate set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, assessed differentially on the rateable capital value of all rateable land within the scheme classifications as detailed below.

The targeted rates set below are the rate in the dollar on the rateable capital value of rateable land situated within each classification.

Lower Clutha Flood Protection & Drainage Scheme		
Classification	Rate in \$ on Capital Value	Revenue Sought \$
A	0.00771	54,923
B	0.00306	208,941
C	0.00289	389,862
D	0.00181	70,196
E	0.00096	64,941
F	0.00011	47,436
U1	0.00306	5,740
U2	0.00102	308,790
U3	0.00022	25,491
U4	0.00017	91,306
Total		1,267,626

Tokomairiro Drainage Scheme		
Classification	Rate in \$ on Capital Value	Revenue Sought \$
A	0.00017541	127,123
B	0.00017541	
C	0.00017541	
D	0.00017541	
E	0.00017541	
F	0.00017541	
U1	0.00009732	49,437
Total		176,560

Lower Taieri Flood Protection Scheme		
Classification	Rate in \$ on Capital Value	Revenue Sought \$
WF1	0.00142572	\$1,097,796
WF2	0.00142572	
EF1	0.00003203	\$135,683
EF2	0.00003203	
EF3	0.00003203	
EF4	0.00003203	
EF5	0.00003203	
EF6	0.00003203	
EF7	0.00003203	
EF8	0.00003203	
EF9	0.00003203	
EF10	0.00003203	
EF12	0.00003203	
EF13	0.00003203	
Total		\$1,233,478

3.2 East Taieri Scheme

For the purpose of providing for the maintenance and improvement of works, in the East Taieri drainage scheme, the following two rates are set:

Targeted Differential Rate

A targeted rate set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, except those rating units situated within classifications ED3 and ED6, assessed differentially on the area of land of all rateable land situated within the scheme classifications as detailed below.

The targeted differential rates set below, are the dollars per hectare of rateable land situated within each classification.

East Taieri Drainage Scheme - Targeted Differential Rate		
Classification	Rate \$ per hectare	Revenue Sought \$
ED1	165.7815	787,956
ED2	165.7815	
ED4	165.7815	
ED5	165.7815	
ED7	165.7815	
ED8	165.7815	
ED9	165.7815	
ED10	165.7815	
Total		787,956

3.3 West Taieri Scheme

For the purpose of providing for the maintenance and improvement of works, in the West Taieri drainage scheme, the following two rates are set:

Targeted Differential Rate

A targeted rate set under sections 16, 17, 18 and 146(1)(b) of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, assessed differentially on the area of land of all rateable land situated within the scheme classifications as detailed below.

The targeted differential rates set below, are the dollars per hectare of rateable land situated within each classification.

West Taieri Drainage Scheme - Targeted Differential Rate		
Classification	Rate \$ per hectare	Revenue Sought \$
WD1	129.7424	999,884
WD2	129.7424	
WD3	129.7424	
WD4	129.7424	
WD5	129.7424	
Total		\$999,884

3.4 Leith Flood Protection Scheme

For the purpose of providing for flood protection works, in the Leith Flood Protection scheme area, a targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit within the scheme area, assessed differentially on the rateable capital value of all rateable land situated within the scheme classifications as detailed below:

Leith Flood Protection Scheme		
Classification	Rate in \$ on Capital Value	Revenue Sought \$
A – Direct benefit zone	0.00042401	\$722,423
B – Indirect benefit zone	0.00001679	\$722,423
Total		\$1,444,846

4. Transport Services Rates

For the purpose of providing for urban passenger transport services within the Dunedin city area and a service to Palmerston, and public passenger transport services within the Queenstown area, targeted rates set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit within the transport rating areas, assessed differentially on the rateable capital value of all rateable land situated within the transport rating classifications, as detailed below:

Dunedin Transport Services Rate		
Classification	Rate in \$ on Capital Value	Revenue Sought \$
Class A	0.00098717	3,209,650
Class B (within Dunedin City)	0.00026324	9,045,905
Class B (within Waitaki District)	0.00027881	67,398
Total		12,322,998

Queenstown Transport Services Rate		
Classification	Rate in \$ on Capital Value	Revenue Sought \$
Class A	0.00016744	966,992
Class B	0.00008372	3,083,122
Total		4,050,114

5. Catchment Management Rate

Rate for the purpose of funding biodiversity, land and water implementation, water quality remediation and integrated catchment management activities. A targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on the capital value of all rateable land situated within the territorial authority districts within the Otago region.

Catchment Management Rate		
	Rate in \$ on Capital Value	Revenue Sought \$
Central Otago	0.00004122	767,410
Clutha	0.00004073	427,464
Dunedin	0.00003873	1,732,424
Queenstown Lakes	0.00003998	2,916,536
Waitaki	0.00004102	368,912
Total		6,212,745

7. Wilding Tree Rate

For the purpose of providing for the control of wilding trees, a targeted uniform rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on all rateable land in the Otago region.

Wilding Tree Rate		
	Uniform rate \$	Revenue Sought \$
All rating units	2.41	293,825
Total		293,825

8. Civil Defence and Emergency Management

For the purpose of providing for Civil Defence and Emergency Management functions undertaken by the Council, a targeted uniform rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on all rateable land in the Otago region.

Civil Defense and Emergency Management Rate		
	Uniform rate \$	Revenue Sought \$
All rating units	37.73	4,600,078
Total		4,600,078

9. Navigational Safety

For the purpose of providing harbour and navigation safety functions undertaken by the Council, a targeted uniform rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, assessed on all rateable land in the Otago region excluding Queenstown Lakes District who have a separate harbourmaster service provided by Queenstown Lakes District Council.

Navigational Safety Rate		
	Uniform rate \$	Revenue Sought \$
All rating units excluding those in Queenstown Lakes District	11.18	1,016,003
Total		1,016,003

10. Biosecurity Rate

10.1 Territorial Authority Districts

For the purpose of managing pest plants and animals through inspections, education and promotion of landowner led initiatives alongside undertaking control works for specified pests including rooks and wallabies within the Otago region. This is a targeted rate set under sections 16, 17 and 18 of the Local Government (Rating) Act 2002, made on every rating unit, assessed differentially on the rateable land value of all rateable land situated within the territorial authority, as detailed below:

District	Rate in \$ on Land Value	Revenue Sought \$
Central Otago	0.00006515	662,380
Clutha	0.00006437	429,773
Dunedin	0.00006167	1,474,988
Queenstown Lakes	0.00006352	2,754,184
Waitaki	0.00006443	313,075
Total		5,634,403

11. Other Matters

11.1 Rate Collection

That the Otago Regional Council collects the rates set and assessed in the Otago region, and that the rates become due and payable on or before 31 October 2025.

11.2 Penalties on Unpaid Rates

Pursuant to Sections 57 and 58 of the Local Government (Rating) Act 2002, penalties will be added to unpaid rates assessed by the Council within the Otago region and due to the Council during the 2025/2026 financial year as follows:

- a) A penalty of 10% to be added to rates assessed during the 2025/2026 financial year, or any previous financial year, and which remain unpaid on 1 November 2025.
- b) A penalty of 10% to be added to rates which have been levied in any previous financial year and which remain unpaid on 1 May 2026.

Penalties will not be added to rate balances where the ratepayer has elected the weekly, fortnightly, monthly direct debit option of payment and where all payments under this payment option are honoured on the due payment date.

Penalties will also not be added to ratepayers who have been in arrears and are in a Group Financial Controller agreed payment plan and where all payments under this plan are being honoured on the due payment dates.

The amount of unpaid rates to which a penalty shall be added shall include:

- Any penalty previously added to unpaid rates under Section 58 of the Local Government (Rating) Act 2002.
- Any additional charges previously added to the amount of unpaid rates, and under Section 132 of the Rating Powers Act 1988.
- Any rates previously levied under the Rating Powers Act 1988 that remain unpaid.

11.3 Valuation and Rating Records

That the valuation rolls and rate records for the rates collected by the Otago Regional Council be made available for inspection during normal working hours at the office of the Council, Philip Laing House, Level 2, 144 Rattray Street, Dunedin.

Attachment to the Rates Resolution Report 2025/26								
Dunedin City	Amount of rate per capital value							
Dunedin Residential	\$500,000		\$800,000		\$1,200,000		\$2,000,000	
Assumed Land Value - Biosecurity rate	\$200,000		\$500,000		\$750,000		\$1,500,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional rates								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	83.78	80.40	134.04	128.64	201.06	192.96	335.10	321.60
Catchment Management Rate (CV)	19.37	21.84	30.98	34.94	46.48	52.40	77.46	87.34
River & Waterway Management (CV)	3.42	2.96	5.46	4.73	8.20	7.09	13.66	11.82
Biosecurity (LV)	12.33	11.29	30.84	28.22	46.25	42.33	92.51	84.66
Leith scheme - indirect benefit (CV)	8.40	8.48	13.43	13.57	20.15	20.35	33.58	33.92
Transport - class B (CV)	131.62	118.17	210.59	189.06	315.89	283.60	526.48	472.66
	258.90	243.12	425.35	399.16	638.02	598.73	1,078.79	1,012.00
Total rates including Leith scheme indirect rate	383.70	361.18	550.15	517.22	762.82	716.79	1,203.59	1,130.06
Add the Leith scheme direct benefit rate margin (CV)	212.01	197.24	339.21	315.59	508.81	473.39	848.02	788.98
Total for properties in the Leith Direct Benefit zone	587.31	549.95	875.92	819.24	1,251.48	1,169.83	2,018.03	1,885.12

Attachment to the Rates Resolution Report 2025/26								
Dunedin City			Amount of rate per capital value					
Mosgiel Residential			\$500,000	\$800,000	\$1,200,000	\$2,000,000		
Assumed Land Value - Biosecurity rate			\$200,000	\$500,000	\$750,000	\$1,500,000		
Assumed hectares			0.050	0.065	0.500	1.000		
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	83.78	80.40	134.04	128.64	201.06	192.96	335.10	321.60
Catchment Management Rate (CV)	19.37	21.84	30.98	34.94	46.48	52.40	77.46	87.34
River & Waterway Management (CV)	3.42	2.96	5.46	4.73	8.20	7.09	13.66	11.82
Biosecurity (LV)	12.33	11.29	30.84	28.22	46.25	42.33	92.51	84.66
Transport - class B (CV)	131.62	118.17	210.59	189.06	315.89	283.60	526.48	472.66
Leith scheme - indirect (CV)	8.40	8.48	13.43	13.57	20.15	20.35	33.58	33.92
Lower Taieri Flood - Class-EF8 (CV)	16.02	15.40	25.62	24.64	38.44	36.96	64.06	61.60
East Taieri rate per ha - Class ED7	8.29	7.91	10.78	10.29	82.89	79.12	165.78	158.24
	283.21	266.43	461.75	434.08	759.35	714.81	1,308.63	1,231.84
Total rates	408.01	384.49	586.55	552.14	884.15	832.87	1,433.43	1,349.90

Attachment to the Rates Resolution Report 2025/26								
Dunedin City	Amount of rate per capital value							
Dunedin Commercial	\$750,000		\$1,000,000		\$1,500,000		\$2,500,000	
Assumed Land Value - Biosecurity rate	\$500,000		\$750,000		\$1,000,000		\$2,000,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	125.66	120.60	167.55	160.80	251.33	241.20	418.88	402.00
Catchment Management Rate (CV)	29.05	32.75	38.73	43.67	58.10	65.51	96.83	109.18
River & Waterway Management (CV)	5.12	4.43	6.83	5.91	10.25	8.87	17.08	14.78
Biosecurity (LV)	30.84	28.22	46.25	42.33	61.67	56.44	123.34	112.88
Transport - class A (CV)	740.38	664.67	987.17	886.22	1,480.76	1,329.33	2,467.93	2,215.55
Leith scheme - indirect (CV)	12.59	12.72	16.79	16.96	25.19	25.44	41.98	42.39
	943.64	863.39	1,263.32	1,155.89	1,887.28	1,726.78	3,166.02	2,896.78
Total Rates	1,068.44	981.45	1,388.12	1,273.95	2,012.08	1,844.84	3,290.82	3,014.84

Attachment to the Rates Resolution Report 2025/26								
Dunedin City			Amount of rate per capital value					
West Taieri Farm	\$1,000,000		\$1,500,000		\$2,500,000		\$4,000,000	
Assumed Land Value - Biosecurity rate	\$765,000		\$1,275,000		\$1,615,000		\$1,870,000	
Assumed hectares	15		20		30		50	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	167.55	160.80	251.33	241.20	418.88	402.00	670.20	643.21
Catchment Management Rate (CV)	38.73	43.67	58.10	65.51	96.83	109.18	154.92	174.68
River & Waterway Management (CV)	6.83	5.91	10.25	8.87	17.08	14.78	27.32	23.64
Biosecurity (LV)	47.18	43.18	78.63	71.96	99.60	91.15	115.32	105.54
Leith scheme - indirect (CV)	16.79	16.96	25.19	25.44	41.98	42.39	67.16	67.83
Lower Taieri Flood - Class WF1 (CV)	1,425.72	1,391.89	2,138.58	2,087.84	3,564.30	3,479.73	5,702.88	5,567.56
West Taieri rate per ha - Class WD1	1,946.14	1,852.17	2,594.85	2,469.55	3,892.27	3,704.33	6,487.12	6,173.89
	3,648.93	3,514.57	5,156.91	4,970.36	8,130.92	7,843.56	13,224.92	12,756.35
Total Rates - Non-Dairy Farm	3,773.73	3,632.63	5,281.71	5,088.42	8,255.72	7,961.62	13,349.72	12,874.41
Add Dairy Farm uniform rate	-	561.63	-	561.63	-	561.63	-	561.63
Total Rates - Dairy Farm	3,773.73	4,194.26	5,281.71	5,650.05	8,255.72	8,523.25	13,349.72	13,436.04

Attachment to the Rates Resolution Report 2025/26								
Queenstown Lakes District			Amount of rate per capital value					
Wakatipu Residential			\$500,000	\$1,000,000	\$1,500,000	\$2,000,000		
Assumed Land Value - Biosecurity rate			\$250,000	\$500,000	\$750,000	\$1,000,000		
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
	113.62	107.38	113.62	107.38	113.62	107.38	113.62	107.38
Variable charges (capital value/land value/hectares)								
General rate (CV)	86.48	97.53	172.96	195.05	259.44	292.58	345.92	390.10
Catchment Management Rate (CV)	19.99	26.49	39.98	52.97	59.97	79.46	79.96	105.94
River & Waterway Management (CV)	4.47	4.99	8.93	9.99	13.40	14.98	17.86	19.98
Biosecurity (LV)	15.88	16.90	31.76	33.80	47.64	50.70	63.52	67.60
Transport - class B (CV)	41.86	54.19	83.72	108.38	125.58	162.57	167.44	216.76
	168.68	200.10	337.35	400.19	506.03	600.29	674.70	800.39
Total Rates	282.30	307.48	450.97	507.57	619.65	707.67	788.32	907.77

Attachment to the Rates Resolution Report 2025/26								
Queenstown Lakes District			Amount of rate per capital value					
Wanaka Residential			\$500,000	\$1,000,000	\$1,500,000	\$2,000,000		
Assumed Land Value - Biosecurity rate			\$250,000	\$500,000	\$750,000	\$1,000,000		
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
	113.62	107.38	113.62	107.38	113.62	107.38	113.62	107.38
Variable charges (capital value/land value/hectares)								
General rate (CV)	86.48	97.53	172.96	195.05	259.44	292.58	345.92	390.10
Catchment Management Rate (CV)	19.99	26.49	39.98	52.97	59.97	79.46	79.96	105.94
River & Waterway Management (CV)	4.47	4.99	8.93	9.99	13.40	14.98	17.86	19.98
Biosecurity (LV)	15.88	16.90	31.76	33.80	47.64	50.70	63.52	67.60
	126.82	145.91	253.63	291.81	380.45	437.72	507.26	583.62
Total Rates	240.44	253.29	367.25	399.19	494.07	545.10	620.88	691.00

Attachment to the Rates Resolution Report 2025/26								
Queenstown Lakes District Wakatipu Commercial <i>Assumed Land Value - Biosecurity rate</i>	Amount of rate per capital value							
	\$500,000		\$1,000,000		\$1,500,000		\$2,000,000	
	\$250,000		\$500,000		\$750,000		\$1,000,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
	113.62	107.38	113.62	107.38	113.62	107.38	113.62	107.38
Variable charges (capital value/land value/hectares)								
General rate (CV)	86.48	97.53	172.96	195.05	259.44	292.58	345.92	390.10
Catchment Management Rate (CV)	19.99	26.49	39.98	52.97	59.97	79.46	79.96	105.94
River & Waterway Management (CV)	4.47	4.99	8.93	9.99	13.40	14.98	17.86	19.98
Biosecurity (LV)	31.76	16.90	63.52	33.80	95.28	50.70	127.04	67.60
Transport - class A (CV)	83.72	108.38	167.44	216.76	251.16	325.14	334.88	433.52
	226.42	254.29	452.83	508.57	679.25	762.86	905.66	1,017.15
Total Rates	340.04	361.67	566.45	615.95	792.87	870.24	1,019.28	1,124.53

Attachment to the Rates Resolution Report 2025/26								
Central Otago District			Amount of rate per capital value					
Alexandra Residential	\$500,000		\$1,000,000		\$1,500,000		\$2,000,000	
Assumed Land Value - Biosecurity rate 2023/2024	\$250,000		\$500,000		\$750,000		\$1,000,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	89.16	86.55	178.32	173.11	267.48	259.66	356.64	346.21
Catchment Management Rate (CV)	20.61	23.51	41.22	47.01	61.83	70.52	82.44	94.02
River & Waterway Management (CV)	15.80	15.64	31.60	31.28	47.40	46.93	63.20	62.57
Biosecurity (LV)	16.29	15.12	32.58	30.24	48.86	45.37	65.15	60.49
	141.86	140.82	283.72	281.65	425.57	422.47	567.43	563.29
Total Rates	266.66	258.88	408.52	399.71	550.37	540.53	692.23	681.35

Attachment to the Rates Resolution Report 2025/26								
Central Otago District	Amount of rate per capital value							
Central Otago Farm	\$700,000		\$1,400,000		\$2,100,000		\$2,800,000	
Assumed Land Value - Biosecurity rate 2023/2024	\$562,500		\$1,125,000		\$1,687,500		\$2,250,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	124.82	121.17	249.65	242.35	374.47	363.52	499.30	484.70
Catchment Management Rate (CV)	28.85	32.91	57.71	65.82	86.56	98.73	115.42	131.63
River & Waterway Management (CV)	22.12	21.90	44.24	43.80	66.36	65.70	88.48	87.60
Biosecurity (LV)	36.65	34.03	73.29	68.05	109.94	102.08	146.59	136.10
	212.44	210.01	424.89	420.01	637.33	630.02	849.78	840.03
Total Rates - Non-Dairy Farm	337.24		549.69		762.13		974.58	
Add Dairy Farm uniform rate	-	561.63	-	561.63	-	561.63	-	561.63
Total Rates - Dairy Farm	337.24		549.69		762.13		974.58	

Attachment to the Rates Resolution Report 2025/26								
Clutha District	Amount of rate per capital value							
Balclutha Residential	\$400,000		\$500,000		\$650,000		\$850,000	
Assumed Land Value - Biosecurity rate	\$300,000		\$400,000		\$500,000		\$600,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	70.48	68.03	88.10	85.04	114.52	110.56	149.76	144.57
Catchment Management Rate (CV)	16.29	18.48	20.37	23.10	26.47	30.02	34.62	39.26
River & Waterway Management (CV)	21.27	19.47	26.59	24.34	34.57	31.64	45.20	41.38
Biosecurity (LV)	19.31	17.78	25.75	23.71	32.19	29.64	38.62	35.57
Lower Clutha Flood Protection - Class U2 (CV)	408.21	384.64	510.26	480.80	663.34	625.04	867.44	817.35
	535.56	508.41	671.06	636.99	871.09	826.90	1,135.65	1,078.14
Total Rates	660.36	626.47	795.86	755.05	995.89	944.96	1,260.45	1,196.20

Attachment to the Rates Resolution Report 2025/26								
Clutha District	Amount of rate per capital value							
Milton Residential	\$400,000		\$500,000		\$650,000		\$850,000	
Assumed Land Value - Biosecurity rate	\$300,000		\$400,000		\$500,000		\$600,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	70.48	68.03	88.10	85.04	114.52	110.56	149.76	144.57
Catchment Management Rate (CV)	16.29	18.48	20.37	23.10	26.47	30.02	34.62	39.26
River & Waterway Management (CV)	19.47	19.47	24.34	24.34	31.64	31.64	41.38	41.38
Biosecurity (LV)	17.78	17.78	23.71	23.71	29.64	29.64	35.57	35.57
Tokomairiro Drainage - Class U1 (CV)	38.93	35.56	48.66	44.45	63.26	57.79	82.72	75.57
	162.95	159.33	205.17	200.65	265.54	259.65	344.05	336.35
Total Rates	287.75	277.39	329.97	318.71	390.34	377.71	468.85	454.41

Attachment to the Rates Resolution Report 2025/26								
Clutha District	Amount of rate per capital value							
Clutha Farm	\$500,000		\$1,000,000		\$1,500,000		\$2,000,000	
Assumed Land Value - Biosecurity rate	\$375,000		\$750,000		\$1,125,000		\$1,500,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	88.10	85.04	176.19	170.09	264.29	255.13	352.38	340.17
Catchment Management Rate (CV)	20.37	23.10	40.73	46.19	61.10	69.29	81.46	92.38
River & Waterway Management (CV)	26.59	24.34	53.18	48.68	79.77	73.02	106.36	97.36
Biosecurity (LV)	24.14	22.23	48.28	44.46	72.42	66.69	96.56	88.92
Lower Clutha Flood Protection - Class C (CV)	1,445.74	1,362.26	2,891.48	2,724.51	4,337.22	4,086.77	5,782.96	5,449.02
	1,604.93	1,516.96	3,209.86	3,033.93	4,814.79	4,550.89	6,419.72	6,067.86
Total Rates - Non-Dairy Farm	1,729.73	1,635.02	3,334.66	3,151.99	4,939.59	4,668.95	6,544.52	6,185.92
Add Dairy Farm uniform rate	-	561.63	-	561.63	-	561.63	-	561.63
Total Rates - Dairy Farm	1,729.73	2,196.65	3,334.66	3,713.62	4,939.59	5,230.58	6,544.52	6,747.55

Attachment to the Rates Resolution Report 2025/26								
Waitaki District			Amount of rate per capital value					
Oamaru Residential	\$450,000		\$600,000		\$750,000		\$1,000,000	
Assumed Land Value - Biosecurity rate	\$150,000		\$250,000		\$500,000		\$750,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	79.86	76.54	106.48	102.05	133.10	127.56	177.46	170.09
Catchment Management Rate (CV)	18.46	20.79	24.61	27.72	30.77	34.64	41.02	46.19
River & Waterway Management (CV)	37.95	36.32	50.60	48.43	63.25	60.54	84.33	80.72
Biosecurity (LV)	9.66	8.89	16.11	14.82	32.22	29.64	48.32	44.46
Oamaru public transport (CV)	-	5.45	-	5.45	-	5.45	-	5.45
	145.93	147.99	197.79	198.47	259.32	257.84	351.13	346.91
Total rates	270.73	266.05	322.59	316.53	384.12	375.90	475.93	464.97

Attachment to the Rates Resolution Report 2025/26								
Waitaki District	Amount of rate per capital value							
Waitaki Farm	\$500,000		\$1,000,000		\$1,500,000		\$2,000,000	
Assumed Land Value - Biosecurity rate	\$375,000		\$750,000		\$1,125,000		\$1,500,000	
	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025	2025/2026	2024/2025
Uniform regional charges								
Uniform annual general charge	73.48	69.36	73.48	69.36	73.48	69.36	73.48	69.36
Emergency management uniform rate	37.73	35.63	37.73	35.63	37.73	35.63	37.73	35.63
Wilding trees uniform rate	2.41	2.39	2.41	2.39	2.41	2.39	2.41	2.39
Navigational safety uniform rate	11.18	10.68	11.18	10.68	11.18	10.68	11.18	10.68
	124.80	118.06	124.80	118.06	124.80	118.06	124.80	118.06
Variable charges (capital value/land value/hectares)								
General rate (CV)	88.73	85.04	177.46	170.09	266.19	255.13	354.92	340.17
Catchment Management Rate (CV)	20.51	23.10	41.02	46.19	61.53	69.29	82.04	92.38
River & Waterway Management (CV)	42.17	40.36	84.33	80.72	126.50	121.08	168.66	161.44
Biosecurity (LV)	24.16	22.23	48.32	44.46	72.48	66.69	96.65	88.92
Oamaru public transport (CV)	-	5.45	-	5.45	-	5.45	-	5.45
	175.57	176.18	351.13	346.91	526.70	517.63	702.27	688.36
Total Rates - Non-Dairy Farm	300.37	294.24	475.93	464.97	651.50	635.69	827.07	806.42
Add Dairy Farm uniform rate	-	561.63	-	561.63	-	561.63	-	561.63
Total Rates - Dairy Farm	300.37	855.87	475.93	1,026.60	651.50	1,197.32	827.07	1,368.05

10.4. Environmental Funding

Prepared for: Council

Report No. GOV2572

Activity: Governance Report

Author: Libby Caldwell (Manager Environmental Implementation).

Endorsed by: Joanna Gilroy, General Manager Environmental Delivery

Date: 25 June 2025

PURPOSE

- [1] To present options to Council for approval for the delivery model of the new 'large-scale environmental fund'.

EXECUTIVE SUMMARY

- [2] Through the Long-Term Plan 2024-2034, Council approved the allocation of \$2M per year to fund 'large scale environmental projects, funded by an Otago-wide rate'. The Long-Term Plan details that the additional \$2 million per annum comes into effect from 1 July 2025. Council needs to decide on a delivery model and criteria for the new fund, noting that any decision on the amount of money for the fund, will be through the Annual Plan processes.
- [3] Frequency has supported Council in the development of options for delivery of the fund and these are detailed in the final report on the project. It is recommended that Council implements a delivery model of Prioritised Funding: Structured Purchasing through either an Expression of Interest (EOI) and/or Request for Proposal (RFP) or Direct Engagement, aligned where appropriate to CAP Implementation. This delivery model will achieve the principles of intergenerational impact, facilitation of collaboration across the system and alignment to organisational strategy and strategic direction. Eligibility criteria have been developed to support the implementation of the fund.
- [4] At the Council meeting on 21 May 2025 this paper was left lying on the table to enable staff to provide greater clarity on the eligibility criteria contained within the report. Amendments to this section have been made for the consideration of Council.

RECOMMENDATION

That the Council:

- 1) **Notes** this report.
- 2) **Approves** Option 1 which endorses staff progressing to implement the Prioritised Funding Model 1: Structured Purchasing – ROI, RFP or Direct Engagement, aligned where appropriate to CAP implementation as the model to be used for managing the large-scale environmental fund.

- 3) **Notes** that the establishment date and funding of the large-scale environmental fund is subject to decisions made during the current Annual Plan process and Staff will prepare a finalised implementation timeline post Annual Plan decisions.

BACKGROUND

- [5] Through the Long-Term Plan 2024-2034, Council consulted on a proposed increase in environmental funding of \$500,000 per year from 2025/26 to support large scale environmental projects. Following consultation, Council approved the allocation of \$2M per year to fund 'large scale environmental projects, funded by an Otago-wide rate'. The Long-Term Plan details that the additional \$2 million per annum comes into effect from 1 July 2025.
- [6] Two workshops have been previously held with Councillors, and interviews have been completed with stakeholders and partners. Workshop materials and a list of who was interviewed as part of this project were attached as appendices to the report which was presented to Council on 9 April 2025.
- [7] At the Council meeting on 9 April 2025, Council endorsed the draft principles that were presented which will be used to define 'large-scale' and the delivery models to be detailed to inform a decision on the preferred delivery model. These principles and delivery models are detailed in Attachment 1 and are discussed further throughout this report.
- [8] Council discussed in the workshops, and it was endorsed in the Council meeting on 9 April 2025, that that the large-scale environment fund be based on the following principles instead of setting a specific definition for what is 'large-scale':
- a. **Intergenerational impact** – achieving enduring impacts that are in partnership with mana whenua and communities.
 - b. **Facilitation of collaboration across the system** – ORC should take a leadership role of the funding system, but local leadership and action should be driven by communities.
 - c. **Alignment to organisational strategy and strategic direction** – knowing that the right investment decisions are being made in the right place at the right time to support ORC's strategic directions and goals as set by Council.
- [9] Council endorsed on 9 April 2025, that the final report was to provide further detail on the following funding model options (section 7 of attachment 1). These options are:
- a. A hybrid model that allocates funds by bringing together a structured procurement approach aligned where appropriate to funding the implementation of Catchment Action Plans in line with the ICM process. This would account for funding decisions against a set criteria that invites expressions of interest and also accounts for utilising the mechanisms and processes as part of the ICM process through a direct/expression of interest process and funding via Catchment Action Plans.
 - b. A model that allocated funds via a Joint Venture (such as a collaborative or co-funded approach) in partnership with other entities.

- c. A model that would see funds allocated via a standalone Council Controlled Organisation (such as a Trust). This entity could also be set up to leverage additional investment to support large-scale environmental initiatives. Council asked for this model to be investigated to assess the potential benefits to Council and ratepayers in the long term.

[10] A number of other funding models were discussed in workshops, but not explored further in detail. This information is in the report in Attachment 1. Council also provided direction to focus solely on the new 'large-scale environmental' funding and to not consider this within the context of a review of all funding allocated by ORC to meet environmental outcomes (namely our direct agreements and ECO Fund). This means the ECO Fund will continue to operate in parallel to the new fund.

[11] This paper does not pre-empt any formal decision on the continued existence or amount in the fund (this is through the Annual Plan process), and the delivery model recommended can be successfully implemented with various levels of funding. The Annual Plan process is still underway.

DISCUSSION

[12] Each of the prioritised models are explored throughout the reports prepared by Frequency. For each of the three models strengths and weakness are provided on pages 13-15 of the summary report (Attachment 3) and further detail can be found for each of the prioritised funding models in section 8 of the report (Attachment 1) which covers the benefits and challenges for each of these models. An overview of these models is provided below.

Prioritised Funding Model 1 - Structured Procurement

[13] For Prioritised Funding Model 1 –aligned where appropriate to CAP Implementation the strengths of this model include:

- a. Funding decisions are aligned with organisational strategy (CAPs) and community priorities.
- b. Is underpinned by data, evidence and community-led planning.
- c. Region-wise consistent approach.
- d. CAP development is already a collaborative process, incentivises communities to engage in the planning process when there is potential funding for implementation to follow.
- e. The CAP process assists ORC to measure environmental impact.
- f. Enables enhanced collaboration, stronger relationships with partners and increased coordination with stakeholders.
- g. Likely to be less time and resource intensive than a competitive grant allocating process and likely to be one funding round over three years (enabling three-year contracts to be put in place).
- h. Supports innovation within communities.

[14] The risks associated with this model include:

- a. May be limited capacity within some catchments to manage and administer funding.
- b. Short-term inequity in funding distribution for those areas which don't have CAPs.

- c. Not all communities have mature entities to receive and manage funds which could limit access.
- d. Risk that new processes could duplicate existing mechanisms such as ECO Fund.
- e. Could have impact on existing relationships between community organisations and ORC if those organisations feel they are excluded or don't meet criteria for applications.

[15] It is important to note that with Prioritised Funding Model 1, the Integrated Catchment Management work programme will not have delivered a CAP for every area in the region prior to the funding being available (if approved). The intention of this model is that it does not exclude those areas who do not have CAPs in place yet and it will take some time to roll this programme out region wide. To ensure that there is equity across the region other strategic documents can be utilised to support decision making. This would include alignment to documents such as the ORC Biodiversity and Biosecurity Strategy, Climate Strategy, Regional Pest Management Plan or Strategic Directions.

Prioritised Funding Model 2 – Investing in Joint-Ventures and Co-Funding

[16] For Prioritised Funding Model 2 – Investing in Large-Scale Environmental Initiatives via a Joint Venture or Co-Funding Arrangement the strengths of this model include:

- a. Reduces internal administration and capacity requirements for ORC staff.
- b. Increases coordination of investment decisions across the region.
- c. Potential to solidify a formal partnership with mana whenua and/or a philanthropic investor.
- d. Reduces the perception of conflicts of interest in decision making.
- e. Potential to leverage co-investment opportunities.

[17] The risks associated with this model include:

- a. Funding of overhead fees would be required.
- b. Challenges in aligning the environmental and investment priorities of partners.
- c. Internal cost could be high to establish this model.
- d. Feasibility is not conclusive. Staged processes over the next few years to determine viability would be required.
- e. Minimum of three to five years would be required to fully operationalise.
- f. Success is dependent on long-term commitment to investment and relationship building.
- g. Potential for some inequity in funding distribution as some areas of the region have a higher chance of attracting investment than others. This may not support environmental outcomes sought regionwide if significant co-investment is a requirement.

Prioritised Funding Model 3 – New Council Controlled Organisation

[18] For Prioritised Funding Model 3 – Investing in Large-Scale Environmental Initiatives via a New Council Owned CCO the strengths of this model include:

- a. Independent governance board and structure removes funding decisions from political decisions.

- b. Opportunity to leverage additional funding.
- c. Opportunity for community to have closer involvement in decision making which can support community empowerment.
- d. Could be considered as a medium to long-term option. Further feasibility work is required to determine viability.

[19] The risks associated with this model include:

- a. Investment decisions could become more closely linked to community expectations rather than council priorities or strategy which can lead to reduced accountability to ratepayers.
- b. Would require formal community consultation.
- c. Significant time and resource is required for this option.
- d. Costs associated to managing and monitoring the performance of the entity.

Proposed Eligibility Criteria

[20] The summary report (Attachment 3) details in the Recommendations section what eligibility criteria should include as a minimum. Clear eligibility criteria will enable Council to assess the overall suitability of projects for funding which will enable more informed decision making.

[21] This paper is seeking Council approval of the following eligibility criteria to assist in the assessment of potential funding opportunities. Assessment of projects or programmes occurs against the full list of criteria. Projects do not need to meet every criteria in order to be considered for funding, however a greater alignment with criteria would suggest a stronger fit with the outcomes sought by ORC. The proposed eligibility criteria are as follows:

- a. Alignment with aspirations of Mana Whenua, as expressed in the ORC Strategic Directions and strategy documents created in partnership.
- b. Directly contributes towards achieving priorities identified by ORC and provides a line of sight to those priorities outlined in documents such as Catchment Action Plans.
- c. Initiatives or projects meet the intent of 'large-scale' from an ecological perspective (multifaceted approach).
- d. Investment allows for an increase in scale and/or impact of those projects and initiatives that are already in place (rather than funding new projects or ideas) which are already contributing to environmental outcomes and that demonstrate value for money.
- e. They are a legal entity, able to demonstrate they have capacity, capability and stability (Governance and Financial for example) to deliver 'large-scale' initiatives;
- f. Initiatives are community-led with a high degree of collaboration at all levels of the system.
- g. The extent to which they can act as an umbrella entity and/or collectives of organisations (this should be encouraged but only where appropriate governance and management structures are in place to effectively deliver on requirements).
- h. Their commitment to work together in partnership (with ORC and others), to further enhance collaboration, community activation and sustainable funding and leverage opportunities beyond the initially agreed investment term.

- [22] The above eligibility criteria will enable community organisations to have visibility of the key criteria which will be considered during the funding assessment process.

OPTIONS

Option 1 (recommended)

- [23] Council approves staff progressing to implement the *Prioritised Funding Model 1: Structured Purchasing – ROI, RFP or Direct Engagement, aligned where appropriate to CAP implementation*. This option would enable the fund to be in place and administered within the 2025/26 financial year. The specific reasons why this model is recommended are included in section 8.2 of the Frequency report. This option achieves the intent of the original hybrid model Council was seeking to explore. The report highlights that the CAP process should be a consideration of priority but not in itself be the only consideration of how large-scale funds should be allocated.
- [24] Council approves inclusion of eligibility criteria as detailed in paragraph 21.
- [25] Council endorses the principles on page 4 of the summary report (Attachment 3) (summarised in paragraph 8) being utilised for the definition of ‘large-scale’.

Option 2

- [26] Council provides staff with:
- a. an alternative delivery model to progress to implementation.
 - b. an alternative eligibility criteria to include as a minimum.
 - c. alternative principles to be utilised to define ‘large-scale’.
- [27] This option would result in a delay for stakeholders and community in understanding what principles and funding model are being progressed by ORC for the large-scale environmental fund.

Option 3

- [28] Council does not:
- a. approve any funding delivery model.
 - b. approve the inclusion of eligibility criteria.
 - c. approve the principles detailed in the report being utilised to define ‘large scale’.

CONSIDERATIONS

Strategic Framework and Policy Considerations

- [29] ORC’s strategic directions commit ORC to delivering integrated environmental management, engaging communities and collaborating to deliver. Appropriate design of the large-scale environmental fund will support these objectives.

Financial Considerations

- [30] Funding of \$2 million is included in the budget for the Long-Term Plan 2024-2034, commencing in Year 2 of the Long-Term Plan. This is still subject to the Annual Plan approval process and any decisions through that process.

Significance and Engagement Considerations

- [31] There are no significance and engagement considerations associated with this report.

Legislative and Risk Considerations

- [32] Nil.

Climate Change Considerations

- [33] There are no climate change considerations associated directly with this report, however large-scale environmental funding investment could support climate outcomes.

Communications Considerations

- [34] Given the significant interests of many stakeholders, and the broader community, it will be important to communicate the delivery model for the large-scale environment fund. Communications and engagement plans will be developed.

NEXT STEPS

- [35] Once a decision is made on which delivery model is to be progressed, staff will work to implement the option approved by Council. Staff will ensure that partners, stakeholders and the wider community are updated on Council's decision and are kept informed about the development of the large-scale environment fund. This will include an implementation plan which details important timeframes for potential funding recipients.

ATTACHMENTS

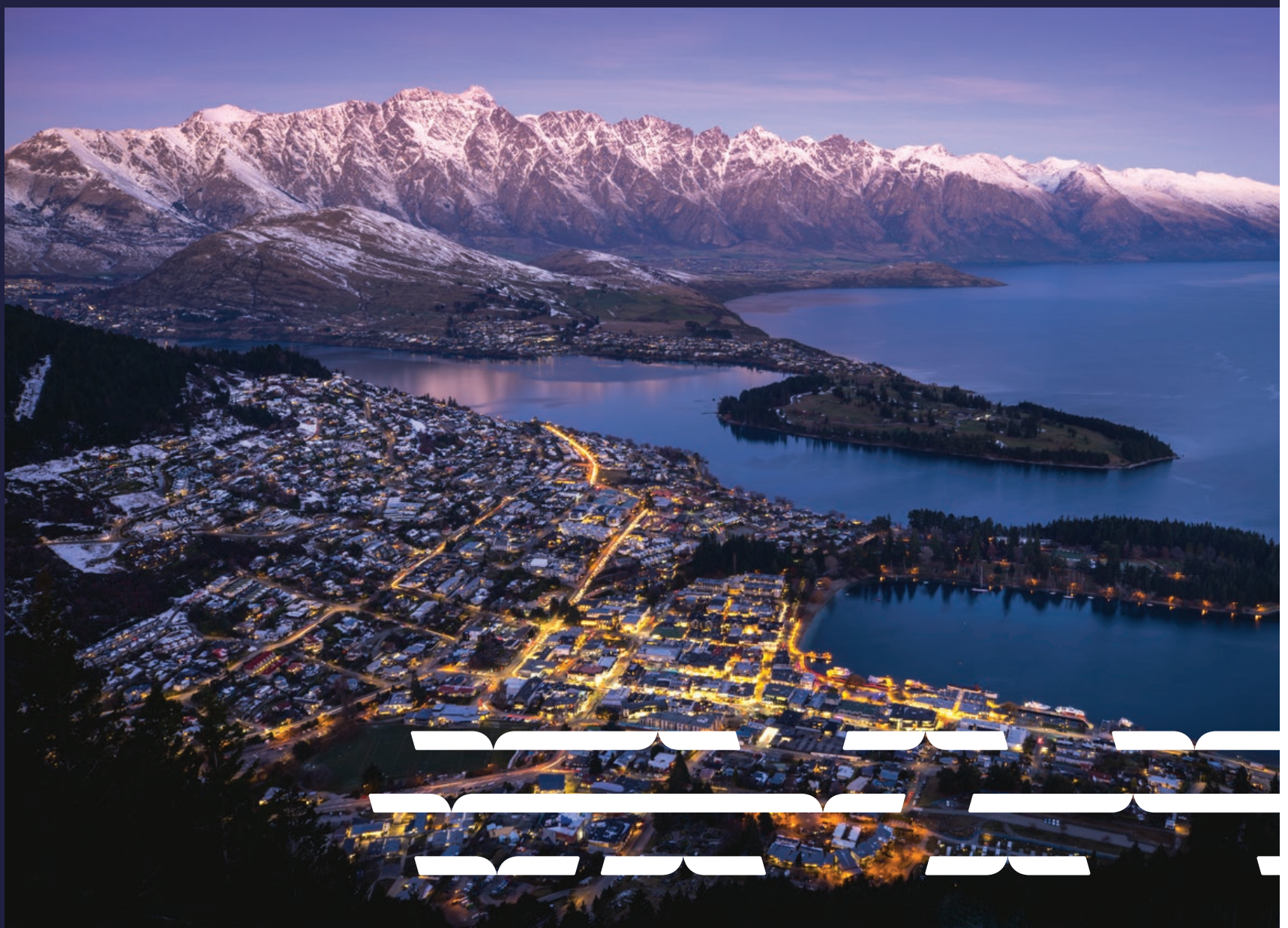
1. FR E-049 ORC Report-v 3 [**10.4.1** - 79 pages]
2. Frequency - ORC Environmental Funding Report - Appendices [**10.4.2** - 222 pages]
3. FR E-049 ORC Report- Summary [**10.4.3** - 21 pages]

Creating a thriving Aotearoa
for future generations

Development and Implementation of 'Large-Scale' Environmental Funding

Analysis and Recommendations for Otago Regional Council

May 2025 | Frequency NZ Ltd



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Table of Contents

Disclaimer 4

1.0 Introduction..... 5

2.0 Problem Statement and Project Scope..... 6

2.1 Introduction..... 6

2.2 ORC Requirements and Project Scope..... 7

3.0 Strategic Context and Background Information..... 8

3.1 Long Term Plan (LTP) 8

3.2 National Policy Statements 10

3.3 National Biodiversity Strategies and Plans 10

3.4 Otago and ORC Strategies and Plans..... 11

3.5 ORC Biodiversity Strategy (2018) and Strategy Review (2025)12

3.6 Integrated Catchment Management and Catchment Action Plans.....12

3.7 Investment in Environmental Implementation..... 13

3.7.1 Jobs for Nature (JfN) 13

3.7.2 ORC Investment..... 13

3.7.2 Other Local Authorities Biodiversity Funding 16

4.0 Large Scale Definition and Criteria 18

4.1 Literature Definitions..... 18

4.1.1 Large scale..... 18

4.1.2 Landscape scale..... 19

4.2 Stakeholder Definitions..... 19

4.2.1 Local Government Definitions..... 19

4.2.2 Stakeholder Feedback 20

4.3 Proposed ORC Definition 22

4.4 Proposed Eligibility Criteria 22

5.0 Literature Review 23

6.0 Partner and Stakeholder Consultation 25

6.1 Mana whenua..... 26

6.2 Territorial Authorities in Otago 26

6.2 Environmental Groups and Delivery Partners across Otago..... 27

6.3 Community and Government Funders..... 28

6.4 Other Local Authorities 28

7.0 Broad Funding Model Analysis and Discussion..... 30

7.1 Introduction..... 30

7.2 Procurement & Grant Making Rules for Public Entities 31

7.3 Procurement Approaches and Prioritisation Framework..... 33

7.4 Funding Model Options.....35

7.4.1 Large-Scale Contestable/Grant Making Fund36

7.4.2 Structured Purchasing Approach – Registration of Interest (ROI) and Request for Proposal (RFP).....38

7.4.3 Funding via the Integrated Catchment Management Programme or by Catchment Action Plan.....41

7.4.4 Devolving ‘Large-Scale’ Funding to a Third Party to Administer & Grow.....45

7.4.5 Joint Venture – Collaborative or Co-Funded Arrangement.....48

7.4.6 Establish a Council Controlled Organisation (CCO).....52

7.5 Summary of Model Alignment to Key Principles and Outcomes55

8.0 Prioritised Funding Model Analysis59

8.1 Introduction.....59

8.2 Prioritised Funding Model 1- Structured Procurement aligned to CAP Implementation60

8.3 Prioritised Funding Model 2 – Investing in Large-Scale Environmental Initiatives via a Joint Venture or Co-Funding Arrangement63

8.4 Prioritised Funding Model 3 – Investing in Large-Scale Environmental Initiatives via a new, ORC owned CCO.....64

8.5 Summary of Prioritised Model Alignment to Key Principles and Outcomes65

9.0 Options & Recommended Approach.....68

9.1 Recommended Approach68

9.2 Alternative Approaches69

10.0 Proposed Plan and Timeline to Implementation.....71

11.0 Recommendations.....73

11.1 Project Recommendations.....74

12.0 Acknowledgements.....76

13.0 Bibliography & Reference List77

14.0 Appendices79

Figure Contents

Figure 1: Large-scale funding options outlined in LTP (2024-34) consultation6

Figure 2: Summary of ORC Strategic Directions 2024-34 Goals9

Figure 3: Timeline of Development and Implementation of Biodiversity Strategy in relation to ‘large-scale’ environmental funding.....12

Figure 4: 2023/24 ECO Fund Allocation.....14

Figure 5: 2024/25 ECO Fund Allocation.....15

Figure 6: Key Terms Used to Articulate a Definition of ‘Large-Scale’ Environmental Funding.....21

Figure 7: Categories of Funding Arrangements with External Parities33

Figure 8: Analysing type of procurement to identify procurement method34

Figure 9: Risk – Value – Cost – Effort Matrix34

Figure 10: Toolkit for Shared Problems Continuum.....48

Figure 11: Summary of Funding Model Features and Alignment to Key Principles and Large-Scale Fund Outcomes55

Figure 12: Models to be included in prioritised analysis and assessment.....58

Figure 13: Summary of Prioritised Funding Model Features and Alignment to Key Principles and Large-Scale Fund Outcomes.....66

Disclaimer

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In addition, the following should be noted:

- We are not qualified investment advisors, financial analysts or accountants and therefore we have not considered detailed accounting or tax implications of the advice in our report.
- Our advice and recommendations are made at a conceptual level, accounting for applicable legislation, rules and regulations in relation to government contracting and procurement (that were accurate and relevant at the time of writing this report), as well as the feedback and learnings from partners and stakeholders.
- Should ORC wish to understand the detailed financial and tax implications of the funding models outlined in this report, they should seek the advice from those qualified to make such a detailed analysis or assessment.
- The observations and advice, as relevant, within this report are made within a historical context (experience and learnings from others that have already taken place). As events and circumstances frequently do not occur as expected, there will usually be differences between predicted and actual results, and those differences may be material. Accordingly, we express no opinion as to how closely the actual benefits and opportunities identified in each funding model will correspond to those predicted and we take no responsibility for the achievement of predicted results.
- This document references high level analysis to inform our findings and recommendations. By its very nature this analysis cannot be regarded as an exact science and the conclusions arrived at in most cases will of necessity be subjective and dependent on the exercise of individual judgement.
- Any reference in this report to financial parameters and impacts has been completed to compare options; it does not constitute formal financial or investment advice and cannot be used or relied upon for this purpose.



Otago Regional Council (ORC) provides environmental funding through various means across the Otago region. This includes both direct and contestable funding which contributes to various environmental outcomes and supports community-led environmental action, in line with the strategic direction of the organisation, national policy statements, strategies and regional planning and regulatory documents that the council is required to adhere to.

This report is the output of a six-month project that we have conducted on behalf of the ORC that sought to investigate the strategic and policy context, the current and past funding environment, an analysis of the research and literature into the effectiveness of funding models and approaches for 'large-scale' or landscape scale environmental outcomes. This was conducted with the purpose of providing advice and recommendations to council in relation to the establishment and administration of a new 'large-scale' environmental fund.

Our work has included significant partner and stakeholder engagement to gain the views and experiences of mana whenua, other local authorities across Otago, environmental organisations and community and government funders in the planning, funding and delivery of environmental initiatives across the region. Additional consultation has been undertaken with regional and territorial authorities around New Zealand Aotearoa to gain a detailed understanding of their investment models to enhance environmental and biodiversity outcomes in their communities.

The new 'large-scale' environmental fund was approved under the Long Term Plan (LTP) 2024-34 process that approved \$2 million per annum of funding be spent to support 'large-scale environmental projects' in the region, funded by a district wide rate. Funds were budgeted for years two and three of the current LTP budget, becoming available from 1 July 2025.¹ An analysis of a range of procurement and funding options was undertaken to

allow council to make an informed assessment regarding a range of investment options that ORC could consider and implement, on their own, or in potential partnership with others.

In addition to our partner and stakeholder engagement, and desktop analysis, Councillors participated in two workshops to discuss possible definitions of large-scale and to determine a long and short list of potential funding model options for investigation. At the conclusion of these workshops, through a Council paper an agreed list of principles the funding seeks to achieve was agreed, as well as a prioritised short list of funding model options that warranted further investigation based on their likelihood of success, achieving value for money and achievement of the councils desired outcomes in the short to medium term.

The purpose of this report is to bring all elements of this work together, combining the detailed research and evidence, partner and stakeholder feedback, aligning this to a range of high-level funding and investment options (that are in line with government procurement rules and best practice), and provide further details of prioritised options and their likely path to transition or implementation. The report concludes with a range of recommendations for ORC to consider, both in terms of implementing the new 'large-scale' funding, as well as opportunities for ORC to achieve greater efficiency and effectiveness in its approach to planning, investing, monitoring and evaluating environmental initiatives across the region (both 'small-scale' and 'large-scale') into the future.

¹ This figure is accurate based on current LTP budget allocations but acknowledges that actual level of funding available may change as part of the Annual Plan process.

2.0

Problem Statement and Project Scope

2.1 Introduction

The LTP 2024-34 consultation outlined that with much of the central government investment into environmental initiatives ending, the impact of this locally would be significant, with less funding available for environmental initiatives into the future than had been available. The consultation document noted that while ORC would not be able to completely fill the gap left by the funding reduction², there was a desire to commit additional investment to help off-set this gap, and ORC proposed that a new environmental fund be established, specifically to support large-scale environmental projects.

Council proposed three investment levels to support the new fund, with the preferred option being an investment of \$500,000 per annum. Initially, Council indicated that their preferred option was to fund this investment from a targeted rate for each of the five districts across the region. An alternative option of a district-wide rate was posed so that funds could be allocated to the greatest areas of need rather than direct to a particular district (relative to the funds a targeted rate would raise for each area).

The draft LTP also noted a desire for council to seek out further investment opportunities from third parties to grow the value of the funding available. A summary of the funding options consulted on in the LTP is outlined in Figure 1 below.

During the consultation process, Council received substantial feedback on the above proposal, with submitters reiterating the uncertainty of ongoing funds and resources available to ensure the continuation of existing pest management and biodiversity projects. Submitters also suggested that ORC should focus investment in this area to also include education and research activities, as well as investing in upskilling communities to engage in large-scale projects.

- The feedback received through the consultation process reinforced the importance of this funding and the need for ORC to continue to support communities to address issues with:
- Funding for large-scale projects
 - Providing clear direction on project funding
 - Flood land resilience
 - Climate change
 - Water quality
 - Air quality
 - Pest management
 - Biosecurity
 - Research activities

Through the deliberations process, council resolved to fund \$2 million per annum for large-scale environmental projects from year two of the LTP (from the 2025/26 financial year), which was to be funded from an Otago-wide rate.

Following sign-off of the LTP, the Environmental Implementation Team sought approval to obtain outside support to determine how this new funding could be established and managed, noting that to date, ORC had not developed an approach or criteria to allocate the additional funding approved through the LTP.





Large-scale environmental funding options		
	Level of Service	Areas Impacted:
Option 1: \$500,000 dedicated funding per year for large-scale environmental projects Rates Impact: See table below	 Increase in ORC level of service	Districts that participate
Option 2: \$1 million dedicated funding per year for large-scale environmental projects Rating Impact: See table below	 Increase in ORC level of service	Districts that participate
Option 3: \$2 million of dedicated funding per year for large-scale environmental projects Rating Impact: See table below	 Increase in ORC level of service	Districts that participate
Option 4: No new funding for large-scale environmental projects Rates Impact: No additional rates	 No change	No change

Figure 1: Large-scale funding options outlined in LTP (2024-34) consultation

² A significant portion of this funding reduction was due to the Jobs for Nature investment ending after a four-year investment by central government.

2.2 ORC Requirements and Project Scope

In July 2024, ORC sought support from an external supplier to analyse the current environmental funding models being used by ORC to support biodiversity outcomes, and to explore funding model options that could be used to inform funding decisions around large-scale projects moving forward. Frequency was engaged in September 2024 to undertake this work and support ORC in resetting the direction of the current investment undertaken by the Environmental Implementation Team – with an initial scope to look at all environmental funding allocated (including the ECO Fund, direct contracting arrangements, and the proposed 'large-scale' fund).

This scope was redefined following the first workshop to focus solely on the 'large-scale' funding and subsequently excluded further review and analysis of the direct contracting arrangements or the ECO Fund (including the General and Incentive funds). The project was broken down into three key phases, with several requirements and milestones agreed. A summary of this is outlined below.

Phase 1: Determining Strategic Priorities and Outcomes

- Plan and facilitate a workshop (or workshops) with ORC Councillors to assist with setting the strategic framework and priorities for future environmental funding. The outcome of this workshop was to achieve alignment on the strategic outcomes and priorities of the fund.
- Complete consultation (in conjunction with ORC) with mana whenua and/or Aukaha and Te Ao Marama (or mana whenua nominated representatives) to understand their priorities, aspirations or concerns for the future development on this fund, its distribution and management.
- Complete an assessment and analysis of the outcomes from the strategic discussions and develop a scope and structure of the delivery of Phase 2.

Phase 2: Analysis and Review of Current State and Potential Future Arrangements

- Complete a desktop review and analysis of the current/ existing/legacy arrangements for the distribution of environmental funding by ORC including contestable and non-contestable sources.
- Provide further analysis to review the suitability of current or existing funding to determine the:
 - Types of funds available and the environmental challenges they seek to address
 - Eligibility and application criteria and processes
 - Alignment to mana whenua priorities and values
 - Models of distribution (such as contestable vs non-contestable, one-off grant vs long term investment)
 - Accountability arrangements
 - Evaluation framework (value for money, outcomes, environmental impact)
- Complete stakeholder consultation to understand views around how the funding could be maximised in the future (building on the strategic outcomes and priorities identified by Council). This consultation was to include existing or previous fund recipients (from both contestable and non-contestable funds), and any other key community stakeholders as identified and agreed by ORC.
- Complete a desktop review and analysis of comparative environmental funding models across New Zealand Aotearoa and internationally (where applicable), with a specific focus on contestable and non-contestable funds. This review was to include interviews with staff or stakeholders involved in similar initiatives in comparable organisations or regions in New Zealand.
- Complete a review and analysis of potential future funding model opportunities for the management and administration of large-scale environmental funds. This was to include reviews of other models in New Zealand Aotearoa and internationally that may be applicable to the Otago context.

All deliverables prepared under Phases 1 and 2 formed the basis of the content of the second Councillor Workshop held in February 2025. The outcomes of the workshop have informed the structure and content of Phase 3 of this project – that is to prepare and present a final report and recommendations for ORC consideration.





Strategic Context and Background Information

A summary of the key legislative and regulatory requirements that ORC is required to consider in relation to large-scale investment/funding decisions is outlined below:

3.1 Long Term Plan (LTP)

Under Section 93 of the Local Government Act (2002), local authorities are required to set out their long-term plan, under consultation, which is required to set out the organisation's priorities for the next ten years. The purpose of the LTP is to:

- Describe the activities of the local authority
- Describe the community outcomes of the local authority's district or region; and
- Provide integrated decision-making and coordination of resources of the local authority; and
- Provide a long-term focus for the decisions and activities of the local authority; and
- Provide a basis for accountability of the local authority to the community.³

In the case of ORC, this strategic document is the Otago Regional Council Strategic Directions 2024-2034, which outlines the ten-year vision and goals for the region. An infographic depicting this vision and the key goals is outlined below in Figure 2.

Under each of the six focus areas, the Council's aspirations are outlined, and the document goes into further detail outlining the goals that ORC wishes to achieve over the next ten years. Many of these goals are directly relevant to the aspirations of the council to protect, improve, and enhance the environment.

These goals and aspirations need to be at the forefront of decisions that Council makes about where it invests and what types of projects or initiatives it invests in. Not all goals outlined in the LTP are directly relatable to 'large-scale' environmental investment, but the goals most relevant are summarised below as follows:⁴


³ Local Government Act (2002), Section 93(1-7)
⁴ These goals and graphics have been taken directly, with permission, from the ORC Strategic Directions Document



Figure 2: Summary of ORC Strategic Directions 2024-34 Goals

Focus Area: Partnership


Goals



- 1. Te Ao Māori concepts of intergenerationally and deeply connected systems are incorporated throughout Council's work programmes.
- 2. Māori and the principle of te mana o te wai are incorporated into our environmental planning, management, and decision making.

Focus Area: Resilience


Goals



- 1. Plans are in place to ensure that the region's most vulnerable communities (geographic and demographic) and ecosystems are resilient in the face of natural hazards.

Focus Area: Climate


Goals



- 1. Plans are in place to ensure that the region's most vulnerable communities (geographic and demographic) and ecosystems are resilient in the face of natural hazards.

Focus Area: Communities

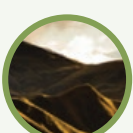
Goals



- 1. Our communities trust us, and they are satisfied with us and the outcomes that we are delivering.
- 2. Our communities are supported and empowered to achieve better environmental outcomes.
- 3. The social, cultural, economic, and environmental wellbeing of Otago is consistently improving.

Focus Area: Environment

Goals



- 1. Ecosystems are healthy, our water and air are clean, and biodiversity loss is arrested across the region.
- 2. We predict and address emerging environmental issues before they arise.
- 3. Our regional plans are effective at ensuring our resources are managed sustainably within biophysical limits in a planned and considered way.

3.2 National Policy Statements

The operating environment for local authorities is continually evolving as statutory, regulatory, and policy systems shift with changes in community expectations and needs, changes in environmental and biodiversity priorities, and the evolution of science and data. The strategic context for environmental funding is no different – with the priorities and actions of ORC being influenced by key pieces of legislation such as the Resource Management Act (1991) which is currently undergoing major reform, and the Biosecurity Act (1993) which is also currently being reviewed.

Under the Resource Management Act, territorial authorities are required to implement ‘national direction’ by giving effect at a regional level to national environmental standards (NES), national policy statements (NPS) and the national planning standards.

The following NPS⁵ are currently in place and ORC is required to give effect to them locally through its regional policy statements (RPS), regional plans, and district plans:

- NPS for Indigenous Biodiversity (2023)
- NPS for Greenhouse Gas Emissions from Industrial Process (2023)
- NPS for Highly Productive Land (2022)
- NPS on Freshwater Management (2020)
- NPS on Urban Development (2020)
- National Policy Direction for Pest Management (2015)⁵
- NPS on Renewable Electricity Generation (2011)
- New Zealand Coastal Policy Statement (2010)
- NPS on Electricity Transmission (2008)

3.3 National Biodiversity Strategies and Plans

Nationally, biodiversity is governed by the Te Mana O Te Taiao Aotearoa - New Zealand Biodiversity Strategy (2020), while the Implementation Plan (2022) sets a pathway for meeting the goals of the strategy and who will be working towards them.

The strategy includes national goals and outcomes for the protection, restoration, and sustainable use of biodiversity, particularly indigenous biodiversity.

The strategy sets out five outcomes to be achieved by 2050:

1. Ecosystems and species from mountain tops to ocean depths are thriving.
2. Indigenous species and their habitats, across New Zealand Aotearoa and beyond, are thriving.
3. People’s lives are enriched through their connection with nature.
4. Treaty partners, whānau, hapū, and iwi are exercising their full role as rangatira and kaitiaki.
5. Prosperity is linked with a thriving biodiversity.

The Implementation Plan sets out a number of actions that the system needs to achieve by 2025. Many of these actions are to be led centrally by DOC and MPI, but regional, unitary, and district councils are tasked with leading the response to a number of these. These action areas will align with the regional planning processes as part of the revised ORC Biodiversity Strategy, which will be consulted on later this year.

DOC leads the strategy and its implementation however ORC has a key role to play in supporting the implementation, with large-scale environmental funding providing opportunities to support the achievement of the strategy’s outcomes.



⁵ Note ORC is required to give effect to this under the Biosecurity Act 1993, while the other NPS are required under the RMA (1991)



3.4 Otago and ORC Strategies and Plans

As noted above, at a regional level, ORC is required to give effect to a number of national policies and standards through the development of local plans, many of which are developed in partnership with the other local authorities in the region.

Currently, a number of strategies exist, with decisions on the future standing and revision of these documents still under review, some pending outcomes of the proposed reforms to the RMA (1991).

Strategically at a regional level, large-scale environmental funding decisions should be made in line with the priorities and approaches outlined in the following plans:

- ORC Air Quality Strategy (2018)⁶
- ORC Biodiversity Strategy (2018)⁷
- ORC Biosecurity Strategy (2019)⁸
- The Future Development Strategy for Ōtepoti Dunedin⁹
- The Future Development Strategy for Queenstown¹⁰
- The Head of Lake Whakatipu Adaptation Strategy¹¹
- ORC Infrastructure Strategy (2024-2054)
- Regional Erosion Control Strategy (2023-2033)
- Regional Wilding Conifer Strategy (2023-2029)
- ORC Climate Strategy (2024)

We note the existence of a number of flood-management strategies that are now largely completed and less relevant to the allocation of large-scale funding into the future.

While not specifically discussed in this report, we also note the Iwi Natural Resource Management Plans that are in place and have been developed by, and are owned by, the Otago and Murihiku rūnaka. They are important documents which aid councils in meeting their statutory obligations under the RMA (1991) and LGA (2002). These documents identify the primary issues associated with natural resource and environmental management from the perspective of rūnaka across the takiwā and should be considered in any decisions relating to implementation of a 'large-scale' environmental funding.

⁶ This strategy is currently under revision and will be replaced with a new strategy in 2025.
⁷ Revision of this strategy is well underway, with community consultation on a draft document to take place later in 2025.
⁸ This strategy will be absorbed into the new Biodiversity Strategy which will supersede this document.
⁹ This is being developed in partnership with Dunedin City Council.
¹⁰ This is being developed in partnership with Queenstown Lakes District Council.
¹¹ This is being developed in partnership with Queenstown Lakes District Council.

3.5 ORC Biodiversity Strategy (2018) and Strategy Review (2025)

The operative ORC Biodiversity Strategy (2018) identifies how ORC will add value and strategic leadership to the biodiversity initiatives of communities and other organisations in Otago. The current strategy identifies how ORC will support and foster coordination and collaboration across the existing 70+ organisations and community groups, as well as private landowners and individuals that work to enhance Otago's biodiversity.

The strategy outlines five desired outcomes which ORC seeks to achieve which are:

- All indigenous species and ecosystems that support them are maintained.
- Threatened indigenous species and ecosystems that support them are actively protected and enhanced.
- People are aware and proud of Otago's biodiversity.
- Kāi Tahu's role as kaitiaki is acknowledged and supported.
- Otago's biodiversity adds value to the regional economy.

These outcomes are underpinned by a range of activities that were set to guide implementation through to 2024/25. The key implementation activities focused on delivery in the areas of:

- Leadership and collaboration
- Education and information sharing
- Monitoring and research
- Regulatory activities

This strategy is currently under review, and we feel it is important to mention the review and its relevance to this project. In an ideal world, funding and investment decisions would follow the development of a revised strategy and implementation plan (after endorsement by partners and approved by Council). Within the short-term, this necessary alignment will not be able to be achieved.

Through this project, we have signalled these challenges to both Council and internally with ORC staff, including consultation with the Biodiversity Strategy Working Group. This was to obtain their input, including their views on the way forward for 'large-scale' funding in the absence of a revised Strategy or Implementation Plan.

Further information on the timing of the Strategy in relation to this work is outlined below in Figure 3. This was presented to Councillors as part of the Second Councillor Workshop.

3.6 Integrated Catchment Management & Catchment Action Plans

Integrated Catchment Management (ICM) is a generic term which refers to the holistic approach to natural resource management, recognising the interconnectedness of land, water, and people, and aims to achieve sustainable outcomes for an entire ecosystem (or catchment). ORC is leading the way in the evolution and implementation of this approach and is focused on facilitating and empowering communities within a catchment to plan how collectively they wish to manage and restore the area.

This approach brings together the community, iwi, stakeholders, and the council to develop a long-term plan (10-year plan) that outlines how the catchment will be protected and managed. Each Catchment Action Plan (CAP) will outline areas of priority and the key outcomes that the community and council wish to achieve for the catchment – with the initial focus being on what should be achieved (that is, the desired outcomes) rather than the how the outcomes will be achieved (that is, what projects should be delivered).

To date, the pilot phase of this work has been completed with the Catlins catchment, and a plan for the Upper Lakes area is currently under development. There are potentially a further eight catchment areas that have been identified by ORC and a process and timeline for the development of these plans is currently in progress internally. Currently, no set funding is available to support the implementation of these CAPs once they have been developed and signed off, but the Catlins Action Plan recently received one-off funding from council in the 2024/25 financial year to support their first stage of implementation.

The ICM and CAP processes are outlined further in Sections 6.0 and 7.0 of this report, as this approach has a strong correlation to the work that was undertaken to define 'large-scale environmental funding' and was identified as a possible framework and model for allocating 'large-scale' funding.



Figure 3: Timeline of Development and Implementation of Biodiversity Strategy in relation to 'large-scale' environmental funding.

3.7 Investment in Environmental Implementation

In the development of this report, it was important to investigate the ways in which these strategies and plans are being implemented on the ground. In the context of this report, this specifically relates to the funding mechanisms that are in place to support environmental implementation and how it contributes to achieving environmental and biodiversity outcomes.

This section outlines the strategically relevant funding mechanisms that have been available or are available to communities across Otago, and that either support or enhance ORC's ability to deliver on their core obligations.

3.7.1 Jobs for Nature (JfN)

The Jobs for Nature (JfN) initiative was launched in mid-2020 as part of a government wide COVID-19 recovery package that had the primary aim of increasing employment in the regions, and with a secondary outcome of creating environmental benefit. Investment was targeted to the regions that were projected to suffer considerable economic and employment losses due to the pandemic. This multi-agency response was administered by the Department of Conservation (DOC), Ministry for the Environment (MfE), Ministry for Primary Industries (MPI), Kānoa, and Land Information New Zealand (LINZ), with an initial funding package of \$1.245 billion. Over the past four financial years, the funding levels have changed, with the funding reduced to \$1.185 billion as a result of government reprioritisation however the funding was only ever intended to be in place for a four-year period.

Successful funding recipients included local government, iwi, charitable trusts, community groups, and private companies. Nationally the initiative had cumulatively funded 524 projects and employed 15,568 people to December 2024¹² (by December 2024 only 958 were still employed under the initiative as many projects had begun to wind down as investment had ended).

The impact of this initiative in the Otago region was significant, with the construction and tourism sectors hit hard by the pandemic. This impact was disproportionately weighted to the Queenstown-Lakes area which relies heavily on tourism to support employment and GDP. Employment estimates made during the pandemic, predicted that employed in the Queenstown-Lakes area would fall by 25.3% between March 2020 and March 2021, with a total projected loss of 7,900 jobs.¹³ Jobs for Nature data to 30 September 2023 showed that \$62.1 million had been invested into Otago across 33 projects, which lead to a contribution of \$103.2 million to GDP and that had supported 491 FTE in jobs.¹⁴

3.7.2 ORC Investment

The initial scope of this project (and our report) was to review all funding allocated by the Environmental Implementation Team and make recommendations on the future use and opportunities for funding allocated under the ECO Fund process (including Incentive Funding), as well as direct funding agreements, and the new 'large-scale' environmental fund.

Following the first workshop, it was agreed that the scope would be refined to focus on the new investment only, noting that ORC had a range of processes in motion and existing agreements in place for the delivery of projects and services, and that the timing was not right to look at their investment package in its entirety. It was agreed that it was strategically imperative to determine where and how 'large-scale' funding/investment 'fitted' before looking at the other funding allocated by council.

Regardless of this change in scope, it has still been important to look at the investment being made by ORC as a whole, to gain a better picture of what investments are being made where, how and for what reasons, so that our advice is made with these arrangements in mind, and so that our advice does not unintentionally lead to recommendations that could create duplication, exaggerate existing gaps, create internal confusion, or create confusion within the sector or communities.

There are a number of existing funding and grant making mechanisms used by the Environment Implementation Team to support on the ground delivery across the region. These include:

- The ECO Fund (General)
- The ECO Fund (Incentive Funds)
- Direct funding arrangements

ORC also contributes other funding related to environmental outcomes, which were outside of our scope of work and have not been considered as part of this work, including the Consent Fee Fund, ad hoc or one-off requests that may receive funding, or nationally funded initiatives such as Toitū Te Hākapupu.

The ECO Fund & Incentive Funds

The ECO Fund was introduced in 2018 to support communities to implement projects that sought to either enhance or promote biodiversity, biosecurity, and water quality outcomes for the region. Since the inception of the Fund, it has evolved and diversified with Incentive Funding introduced in the 2020/21 FY and large-scale biodiversity funding introduced in the 2022/23 FY.

The ECO Fund is administered annually through a contestable funding round held in March. Each category of funding has a specified scope of investment, eligibility criteria, term of investment available (ranging from 1-3 years), and a maximum level of funding available per project. ORC has the ability to amend the categories (and value of each category) each year, subject to council approval, to reflect the needs and demands on the funding from the previous year.

Since its inception, the ECO Fund has supported 166 projects, totalling an investment of \$2.59 million, over ten funding rounds. On average, each funding round has been oversubscribed by 300%. Currently, ORC has one dedicated resource to support all aspects of the management and administration of the fund and grant process, however there are many roles across the organisation that support the ECO Fund process, to ensure that there is a collaborative approach to criteria development and to ensure that strategic alignment is maintained to funding decisions. These other roles across the organisation do not have a specific ECO Fund component to them, but they collectively take a shared responsibility for the administration of the fund as part of their day-to-day work.

The continued demand for funds allocated under the ECO Fund was a significant contributing factor to council approving the establishment of the 'large scale' environmental fund.

¹² This is the number of employees who are or have been working in a Jobs for Nature funded project. This includes all employment types, full time, part time, fixed term and contractors.
¹³ Brunson, N. et al (May 2020).
¹⁴ Jobs for Nature, Annual Review Year 4, June 2024.

The structure and parameters of the ECO Fund in 2023/24 and 2024/25 financial years is outlined below in Figures 4 and 5:

Figure 4: 2023/24 ECO Fund Allocation

2023/24 ECO Fund Allocation					
Fund Type	Total \$\$	Max. \$ allocation p/project	Term of Investment	Scope of Investment	Eligibility
General ECO Fund	\$318,630	\$50,000	1-3yrs	Community projects that protect, enhance or promote ORC environment. Can fund up to 50% salary/wage costs.	<ul style="list-style-type: none">Groups of landownersEducational InstitutionsCommunity groupsIwi/hapū
Incentive Funding – native planting (pest management)	\$50,000	\$15,000	1-3yrs	Native planting or regeneration after the removal of pest plants.	<ul style="list-style-type: none">Groups of landownersEducational InstitutionsCommunity groupsIwi/hapū
Incentive Funding – native planting (water)	\$50,000	\$15,000	1-3yrs	Planting or regeneration of native vegetation in riparian areas to improve water quality.	<ul style="list-style-type: none">Groups of landownersEducational InstitutionsCommunity groupsIwi/hapū
Incentive Funding – biodiversity on private land	\$100,000	\$15,000	1-3yrs	Protecting privately owned land.	<ul style="list-style-type: none">Individual landowners
Incentive Funding – rabbit management.	\$100,000	\$50,000	1-3yrs	Long-term coordinated community-led rabbit management.	<ul style="list-style-type: none">Groups of landownersNFP community groupsSome individual properties
Large Scale Biodiversity	300,000	\$50,000-\$150,000	1 year	Projects with large scale biodiversity outcomes.	<ul style="list-style-type: none">May involve pest management, habitat enhancement, protection of high value areas.

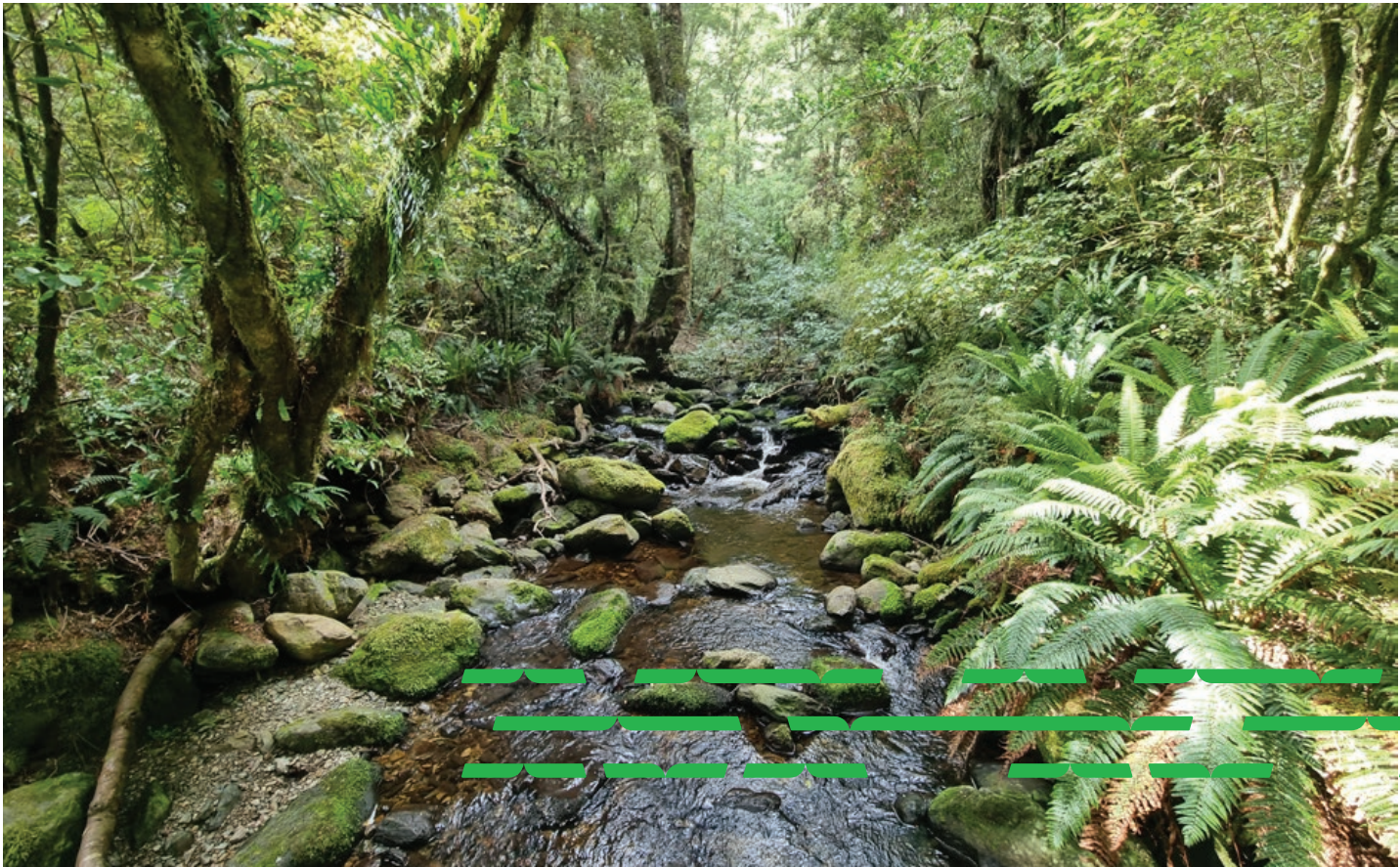


Figure 5: 2024/25 ECO Fund Allocation

2023/24 ECO Fund Allocation					
Fund Type	Total \$\$	Max. \$ allocation p/project	Term of Investment	Scope of Investment	Eligibility
General ECO Fund	\$309,500	\$50,000	1-3yrs	<ul style="list-style-type: none">To protect and enhance Otago's environment.To enable community-led environmental activities.	<ul style="list-style-type: none">Incorporated societies and charitable trustsResident and ratepayer groupsUnincorporated societiesEducational institutionsIwi/hapū
Biodiversity enhancement on protected private land	\$100,000	\$15,000	1-3yrs	<ul style="list-style-type: none">To enhance existing protected areas of biodiversity on private land.To enable private landholders to maintain existing biodiversity.	<ul style="list-style-type: none">Incorporated societiesRegistered charitable trustsIndividual or groups of landholdersPrivate landowners whose property is on Māori customary land, freehold land or Crown land reserved for MāoriIwi/hapū
Sustained rabbit management	\$100,000	\$50,000	1-3yrs	<ul style="list-style-type: none">To manage rabbit populations in new or existing community programme areas.To enable landowners and community to work together to manage rabbit populations.	<ul style="list-style-type: none">Incorporated societies and charitable trustsResident and ratepayer groupsUnincorporated societiesGroups of private landholdersPrivate landowners whose property is on Māori customary land, freehold land or Crown land reserved for MāoriIwi/hapū
Critical source area management on private land	\$50,000	\$15,000	1-3yrs	<ul style="list-style-type: none">To improve water quality.To support private landholder to manage critical source areas for native biodiversity.	<ul style="list-style-type: none">Incorporated societies and charitable trustsPrivate /individual landholdersGroups of private landholdersPrivate landowners whose property is on Māori customary land, freehold land or Crown land reserved for MāoriIwi/hapū
Weed removal and revegetation	\$50,000	\$15,000	1-3yrs	<ul style="list-style-type: none">To improve native vegetation through removal of weeds / pest plants and rehabilitation.To increase area of native terrestrial biodiversity.	<ul style="list-style-type: none">Incorporated societies and charitable trustsResident and ratepayer groupsUnincorporated societiesEducational institutionsIwi/hapū
Large Scale Biodiversity	\$450,000	\$50,000-\$150,000	1 year	<ul style="list-style-type: none">Protect and enhance native biodiversity.To enable larger scale projects for significant biodiversity outcomes aligned with regional priorities.	<ul style="list-style-type: none">Incorporated societiesRegistered charitable trustsIwi/hapu



Direct Funding and Contracts

In addition to the contestable grant process (the ECO Fund) outlined above, ORC also has a number of direct contract and service arrangements with strategically important providers across the region. This direct or non-contestable funding currently makes up 56% of ORCs investment in environmental implementation initiatives and programmes, compared to the 44% invested via contestable funding (all ECO Fund categories).¹⁵

Funding directed under these arrangements supports nationally significant work and the implementation of key policy and strategy documents such as the QEII National Trust and Wilding Conifer Trusts. The length of time that these agreements have been in place is variable, with some long-term and historic arrangements in place.

We make some high-level recommendations regarding the future place and role of the ECO Fund and direct funding arrangements in our recommendations section in Section 12.

3.7.3 Other Local Authorities Biodiversity Funding

In addition to ORC investment, other local authorities within Otago all invest in biodiversity initiatives in their communities, to varying degrees. The scale and nature of these funds are all slightly different, and at a staff level, there is some alignment between the application and administration processes, their eligibility requirements, and timing of the funds to avoid duplication.

Through this process however, both councils and community stakeholders noted that there is opportunity to create closer alignment and potentially more formal partnership arrangements to administer and allocate this type of small-scale, contestable grants across the region, that would be more effective and efficient than the current model, which is being replicated six times across the local authorities and ORC.

It is also important to note that many councils have made (or are in the process of making) changes to their overall approach to funding and grant making at either an environmental or organisational level. The data we provide below has been approved for release by the local authorities and is accurate as of March 2025.

The information provided is all publicly available and the investment each council makes should be viewed considering their level of regulatory responsibility, the strategic priorities they have identified, and the ratepayer base they have access to that supports investment in these types of initiatives.

A summary of the other biodiversity funds available across local authorities is outlined in the tables below.

Dunedin City Council (DCC)	
Fund name	DCC Biodiversity Fund
Funds available	\$81,300 per annum GST exclusive.
Funding rounds per annum	Two: <ul style="list-style-type: none">▪ March (decisions in mid-May).▪ September (decisions in mid-November).
Maximum funds per application	\$5,000 GST exclusive.
Scope or conditions of investment	<ul style="list-style-type: none">▪ Provides up to half the cost of a project, up to \$5,000.▪ Project must be finished within two years.
Eligibility	<ul style="list-style-type: none">▪ Private landowners and community groups can apply.▪ Grants are to support practical activities that benefit native biodiversity including:<ul style="list-style-type: none">- Revegetation plantings of locally appropriate native species.- Weed or predator control that benefits a native ecosystem.- Fencing off native forest remnants or wetlands from stock.- Native fauna projects e.g. nest boxes.- Shared contractor costs.▪ Grants can be used for materials such as plants, traps, herbicide or fencing materials.

Waitaki District Council (WDC)	
Fund name	Waitaki Biodiversity Fund
Funds available	\$30,000 per annum.
Funding rounds per annum	Two per financial year (\$15,000 per funding round).
Maximum funds per application	\$5,000 (inclusive of GST) however larger grants may be considered in exceptional circumstances. There is no minimum amount.
Scope or conditions of investment	Investment and projects are prioritised that: <ul style="list-style-type: none">▪ Protect native habitat through fencing and other measures and provide long term legal protection of native habitat through covenants (i.e. QEII).▪ Manage threats to biodiversity such as pest animals and weeds.
Eligibility	To be eligible for funding, a project principally on private land should either: <ul style="list-style-type: none">▪ Be protected by a formal covenant (i.e. QEII), OR:▪ Be recognised as a Significant Natural Area, OR:▪ Meet the Significant Natural Area criteria.

¹⁵ Based on investment figures for the 2023/24 FY.

Clutha District Council (CDC)	
Fund name	Clutha Biodiversity Funding
Funds available	\$13,514.00 2024/25 FY
Funding rounds per annum	Discretionary allocation (first come, first served basis)
Maximum funds per application	Not stated but allocated on cost share basis, with fund providing up to 50% of the total project costs (GST exclusive and recognising reasonable 'in kind' labour costs invested by the applicant.
Scope or conditions of investment	<ul style="list-style-type: none">▪ Provided for any activities that protect or enhance biodiversity, including but not limited to fencing, planting, pest control and weed control▪ Preference will be given to those biodiversity values that are covered by government priorities, area of significant that are outlined in the District Plan or sites which are recommended for protection by DOC.
Eligibility	Applications must be accompanied by a: <ul style="list-style-type: none">▪ Site Plan▪ Photographs of the project area▪ Quotes for any proposed work▪ Assessment of the significant values of the site that has been undertaken▪ Any other supporting material or information.

Central Otago District Council (CODC)	
Fund name	Council Community Grant (broader than environmental)
Funds available	\$151,000
Funding rounds per annum	One held in 2024/25 due to funds being fully allocated.
Maximum funds per application	Not specified but likely under \$5,000 per application.
Scope or conditions of investment	<p>Community grants are available for projects and activities that enhance the wellbeing of Central Otago communities across the number of categories including social, cultural, environmental, and economic wellbeing.</p> <p>Multi-year grants are available, but these are offered sparingly to ensure sufficient available funding in out-years.</p>
Eligibility	Individuals and groups can apply for projects and activities that meet council criteria.

Queenstown Lakes District Council (QLDC)	
Fund name	QLDC Community Fund
Funds available	<p>QLDC administers an annual budget of approximately \$1.8M to support community funding across three broad outcome areas: people, place, and community. This includes projects focused on community wellbeing, built environment, and natural environment outcomes, among others.</p> <p>As part of this, \$200,000 has been contributed by the Resilience and Climate Action team to specifically support community-led environmental projects.</p> <p>This level of funding applies to the first year of the three-year funding cycle. In the two subsequent years of the triennium, the available funding is significantly lower, with \$180,000 available in 2025/26.</p> <p>QLDC also provides in-kind support to community and volunteer groups.</p>
Funding rounds per annum	One
Maximum funds per application	Not specified, however data from the 2024 recipients outlines the size of grants ranging from \$2,000 - \$125,000. Noting that many of these initiatives were not environmental.
Scope or conditions of investment	<ul style="list-style-type: none">▪ Can be multi-year in one year of the triennium; only single-year funding is available in the subsequent two years.▪ Provides operational funding to support rent, administrative costs and utility costs▪ Provides project funding to support project materials, services and payment of project staff.
Eligibility	<p>Applicants must be:</p> <ul style="list-style-type: none">▪ Be a not-for-profit, charitable, or voluntary entity and a legal entity▪ Have no outstanding debt owing to QLDC▪ Operate within QLDC boundaries▪ Demonstrate sound financial management and provide supporting documentation such as financial reports and project budgets▪ Comply with all QLDC regulatory and statutory requirements relating to the delivery of services and projects▪ Deliver services within the timeframe of the approved funding.





Large Scale Definition and Criteria

Prior to determining an appropriate model for allocating 'large-scale' funding, it was necessary to develop an agreed definition of the meaning of 'large-scale' within the context of ORC and this funding. In the process of determining suitable options for a definition, we conducted a review of the literature and evidence to determine how others define 'large-scale' or 'landscape scale'. During our partner and stakeholder interviews, we also sought input from those we met with to determine what 'large scale' meant to them at an individual and organisational level.

4.1 Literature Definitions

4.1.1 Large scale

As a basic definition, 'large-scale' can be defined as "an action or event that happens over a very wide area or involves a lot of things or people".¹⁶ Equally, the term 'landscape scale' often provided broad and generic language that is difficult to quantify – for example, the Scottish Environment Protection Agency defines landscape-scale as "working in collaboration at a big scale to deliver more benefit for the environment and people."¹⁷

From our review of the literature on terms, the explanations and interpretations of both 'large-scale' and 'landscape scale' have many consistent features, but the interpretation and application of these are highly contextual.

It is important that ORC recognises the contextual importance of the definition when defining and communicating their interpretation of 'large-scale' and how this will apply in the application of the 'large-scale' environmental funding. The consistent variables that the literature determines to constitute large-scale' includes:¹⁸

- **Spatial scale** – defining 'large-scale' from a land-scale perspective which can range from a region to a global scale.
- **Time scale** – using time to determine and define 'large-scale' which could range from years to decades to an intergenerational focus.
- **Biological scale** – defining 'large-scale' by the level of biodiversity complexity that exists in a region through to focusing on entire ecosystems.
- **Evidence scale** – defining 'large-scale' by the level of priority it is deemed to have from a biodiversity science and data perspective.
- **Implementation scale** – defining 'large-scale' by the size of the groups or people leading the response such as the size of the organisation responding to the environmental needs identified or prioritised.
- **Collaboration scale** – using the level of community activation and engagement or the level of cross-organisation or agency collaboration present between communities, agencies, volunteers, and mana whenua to determine what is considered 'large-scale'.

¹⁶ Cambridge Dictionary, Collins Dictionary

¹⁷ Scotland's Environment - [Landscape-scale conservation](#) | [Scotland's environment web](#)

¹⁸ See full bibliography for further information on references used.

- **Financial scale** – using the value of an investment to define the scale of the work, with 'large-scale' being defined by the value of the investment allocated as well as the level of co-investment obtained, or additional funding leveraged from additional sources (such as cross agency, joint ventures, or additional philanthropic investment).

4.1.2 Landscape scale

'Landscape scale' is a more recognisable term in the environmental sector and literature with the term being used more consistently to explain the scale of projects and initiatives in relation to environmental conservation. Scott and James (2007) noted that "landscape scale conservation is a recently derived concept which brings together principles of landscape ecology and biological conservation" and that it is "carried over an area of landscape where the mix of local ecosystems or land uses is repeated in similar form over kilometres-wide areas".¹⁹

The key consideration from the evidence is that landscape scale is based on the premise that the spatial configuration of a landscape has a profound effect on the ecology and biodiversity found within it, but that landscape scale is also complex and at times the elements can be considered contradictory.

Those elements that repeatedly came through the literature as being used to define landscape-scale are as follows:

- **Interconnected** landscapes that have many land uses and
- Where **multiple ecosystems** are present; that may also cover
- **Large** geographical areas; and that may also
- Provide multiple benefits including **environmental, social and economic** to the area
- Where **multiple stakeholder interests** may be present

The right 'scale' for ORC to use in this context will likely be dependent upon the features of the landscape, the people and groups of people involved, consideration of the cultural features of the land as well as the ownership structures (such as protected land vs privately owned land vs Crown land).

4.2 Stakeholder Definitions

During all partner and stakeholder interviews, we asked participants to provide their views and opinions of 'large-scale' and asked for examples of an actual definition they use in practice (for example, other local authorities with 'large-scale' funds in place) and/or their thoughts and interpretation of what 'large-scale' meant to them or what they interpreted 'large-scale' as meaning. This process provided a range of responses, which reinforced the complexity and ambiguity of defining 'large-scale'. It confirmed the notion that it means different things to different people – with the context being critically important.

4.2.1 Local Government Definitions

Some councils we met with have specific funds in place that they define as 'large scale', with the administration of these being conducted in a number of ways. Both Auckland Council and Waikato Regional Council have worked through the process of defining and refining their definitions and approach to 'large-scale' in recent years, to ensure their use of the term is contextually relevant within their organisation and with their suppliers, stakeholders, and ratepayers. Examples of their approaches are outlined below.

Auckland Council

Auckland Council provides funding for 'large-scale' initiatives using a direct procurement method to engage or purchase services from qualified suppliers. Through their recent reviews of their Grant Strategy and the implementation of pilot initiatives (such as the Community Coordination and Facilitation Grant Programme) they have evolved (and are continuing to evolve) their definition of 'large-scale', moving their investment towards those entities mature enough to take on a core delivery role (for services that council may have traditionally delivered in the past).

They recognise 'large-scale' as requiring a partnership approach, where the council and community entity/organisation can enter into a mutually beneficial relationship– where the council plays a key role in supporting the ongoing capability building of these organisations, to ensure they have the capacity and capability to deliver what they have been contracted or funded to do.

Currently, for a project or programme to be deemed 'large-scale' in the eyes of Auckland Council, the following conditions need to be met:

- There are usually multiple land tenure arrangements – this is the situation where more than one person or group holds rights or interests to the same piece of land, where different individuals or entities may have different rights to use, control, or benefit from the land; and
- The project or initiative must be community led; with
- Strong connections to mana whenua; and ideally
- The initiative is governed and managed by an umbrella organisation or entity representing multiple community groups or organisations.

¹⁹ Scott, A.V and James, P. 2007. *What is landscape-scale conservation and how does it apply to urban regeneration?* 7th International Postgraduate Research Conference in the Built and Human Environment. University of Salford, UK.

Waikato Regional Council

Earlier this year, Waikato Regional Council administered funding under their 'Natural Heritage Fund' (NHF) programme where they have developed a comprehensive criterion to communicate to their community what they define as a 'large-scale' investment. The broader Natural Heritage Fund Partnership Programme is not new and has been in place for 15-20 years in the region.

Those wishing to apply to the NHF were required to self-assess against the criteria to determine whether they met the threshold to apply to the fund for projects and initiatives. The self-assessments were then verified by assessors before applicants moved further along the process. Their definition and 'pre-application' criteria include six different components which allow the council to take a multifaceted approach to defining and articulating 'large-scale' within the context relevant to their council and communities.

Applicants need to be able to provide evidence that they are able to meet at least one element of each of the components below (except the 'community led' requirement, where all elements must be met). The key components of the pre-application process include:

- **Landscape scale** where applicants need to meet at least one of the following definitions of landscape scale:
 - Larger than 400 hectares
 - Ecological connectivity through the development and enhancement of an ecological corridor or stepping stone
 - A natural defined or defendable ecological region such as a catchment boundary
 - Ecological variation, incorporating multiple ecosystems
 - Connecting community effort by incorporating multiple groups and/or landowners to achieve landscape scale biodiversity, and a collective approach to delivery these outcomes (for example via a hub or collective).
- **Community led and collaborative** where applicants must be able to demonstrate all of the components of collaboration including:
 - Community are part of the governance and strategic planning
 - There is ongoing volunteer input
 - It is mana whenua led or there is ongoing cultural and mana whenua collaboration, support or leadership
 - There are relationships in place with other relevant stakeholders such as funders, businesses, technical experts or local authorities
- **Involvement and support of mana whenua** where applicants need to provide evidence of at least one of the following:
 - The initiative is mana whenua led, including incorporation of mātauranga Māori into planning and delivery
 - There is active mana whenua involvement in governance
 - Mana whenua is actively involved in the delivery of the initiative
 - There is a letter of support from mana whenua confirming alignment with iwi aspirations
 - There is evidence that a cultural framework, plan or guiding document has been developed and is available
- **There are long-term and inter-generational benefits of their initiative**, where applicants need to demonstrate at least one of the following:
 - A history of success with biodiversity outcomes, and a clear plan for the future which incorporates succession planning (for an established organisation)
 - A clear plan for the future and demonstrate the long-term biodiversity outcomes the organisation is working towards (if a new organisation)

- There are a range of people involved in the initiative who come from diverse backgrounds, cultures, age groups, with a range of expertise to support ongoing success

- **Co-funding needs to be demonstrated** to show that funding is not reliant on council investment. Applicants need to demonstrate one or more of the following:
 - There is confirmed funding from other entities
 - There is significant in-kind volunteer support in place
 - Funding is available through a business model (e.g. tourism)
- Applicants **must provide evidence that landowner support and permission** has been granted by providing a signed letter that outlines support for the initiative or granting of permissions (if applicable)

A copy of the full application form and criteria is included in Appendix 1.

4.2.2 Stakeholder Feedback

Through our interviews and discussions, we asked stakeholders to provide their personal thoughts and opinion on what came to mind for them when the phrase 'large-scale environmental initiatives or projects' was used to describe this fund and the priorities or approach that ORC could take to invest these funds.

A similar approach was also undertaken with elected members during the two Councillor Workshops, firstly to test the level of alignment that existed in their interpretation at the start of the project, and again during the second workshop after they had seen some initial findings from the literature review and partner and stakeholder engagement.

The feedback we received through this process was consistent with the academic evidence and data and reinforced that there is no one single agreed interpretation or understanding of what 'large-scale' can be defined as. The feedback we received was highly contextual and based on the individual experiences and views of the people we spoke with, the community they lived and worked within, and the breadth of knowledge and experience they or their organisation had working across multiple environmental domains.

The word cloud in Figure 6 below outlines the concepts and terms that were regularly and consistently raised during this process, regardless of entity or organisation. The larger the text, the more the term was used to explain the interpretation of 'large-scale'.

At a high level, there is some overall consistency and alignment with the views of council and community stakeholders that 'large-scale' environmental funding should:

- Have an intergenerational focus.
- Be aligned to the aspirations of mana whenua.
- Allow for community-led solutions.
- Focus on change at a landscape or ecosystem level at a catchment level as a minimum.
- Encourage, enable and reward collaboration.
- Provide medium term investment commitments by having funding agreements in place for at least three years.
- Support existing initiatives to up-scale rather than encourage the development of new projects or initiatives.
- Allow for funds to be used to support research, evaluation, education and system enhancement.

Figure 6: Key Terms Used to Articulate a Definition of 'Large-Scale' Environmental Funding



4.3 Proposed ORC Definition

A key deliverable of this work was for us to guide council through the process of developing and agreeing a suitable definition (which include clarification of what environmental domains the funding could look to target) of 'large-scale', that aligned to the intent of what was approved through the LTP. This could include providing clarification of what environmental domains this funding could look to target, as this was not specified as part of the LTP approval process.

At the end of the first Workshop, Councillors agreed that it was more important for this funding to focus on achieving environmental outcomes and impact, rather than focusing on one or more environmental areas (such as investing in biodiversity projects but not air quality). The only exception to this was transport, which was to be excluded as an area of focus under 'large-scale' investment.

The workshop outcomes, our findings from the evidence, and our feedback from stakeholders highlighted and reinforced the challenges and complexity of developing a concise definition that could be linked to a priority list of 'environmental domains', that ORC should seek to invest in. We initially proposed a number of 'draft' definitions for council to consider, but it was felt that none of them effectively reflected the local context, with concerns raised that a rigid definition that may reduce innovation, flexibility, and collaboration when it came time to implement and use the funding.

We concluded that it would be difficult to develop one single clear and concise definition that could encapsulate all necessary elements of 'large-scale' or 'landscape-scale' effectively. As a result, in Workshop Two, we facilitated an alternative approach with councillors, choosing instead to focus on developing and agreeing a set of key principles and outcomes that ORC wanted this investment to achieve (or contribute towards achieving).

Following this process, there was consistent agreement that the intent and role of 'large-scale' environmental funding would be aligned to the environmental impact that council wishes to make, with key principles and outcomes identified that would be used to communicate their intentions, guide decisions around the type of funding model used, and ultimately guide the parameters of how 'large-scale' investment would be made. Councillors confirmed these principles and approach at the Council Meeting held on 9 April 2025. The principles are:

- **Our investment will have contributed to creating intergenerational impact** – that is making investment decisions to support initiatives and projects that are focused on enhancing biodiversity and environmental outcomes for the benefit of future generations. These will either be mana whenua led or supported and will be undertaken in partnership with mana whenua and communities.
- **We will have strengthened and enabled collaboration across the system by providing clear leadership** – this recognises that while the ORC has a statutory and regulatory in environmental stewardship, they also play a key role in leading the wider environmental system (in partnership with key government agencies and local authorities). Through this funding, ORC will work to lead and enable collaboration on the ground that will enhance community leadership and action.
- **We will have made investment decisions that align with our strategic priorities, in partnership with our communities** – this recognises the importance of connecting our organisational and strategic priorities to implementation priorities, and then ensuring our investment contributes towards these. It is ensuring we use our scarce resources effectively to have a positive environmental impact while also delivering value for money to our ratepayers.

4.4 Proposed Eligibility Criteria

The principles and outcomes outlined above are aspirational in nature and allow council to articulate the impact they want this investment to create. Making investment decisions against aspirational outcomes alone will not be sufficient, and it is recommended that along with these core principles, ORC develops a clear criterion to further identify and quantify the elements that ORC defines as 'large-scale' within their local context.

This criterion would be developed in parallel with overall funding model decisions, but refined and confirmed by council staff once a funding model to allocate funds is agreed. This criterion should then be approved by Council.

It is also our recommendation that this criterion be used as a 'screening' or 'pre-procurement' tool to determine eligibility to apply to the 'large-scale' fund ahead of making formal applications. This criterion would then sit alongside more detailed procurement evaluation methodologies (which are discussed in more detail in Sections 7 and 8 of this report). Based on our research and engagement, it is recommended that an eligibility criterion should include the following:

- Initiatives/projects needs to align with the intergenerational aspirations of mana whenua, with a demonstrated level of support obtained for the initiative from mana whenua/papatipu rūnaka.
- Initiatives/projects needs to directly contribute towards achieving priorities identified by ORC and other local authority partners and provide a line of sight to those priorities in documents such as Catchment Action Plans.
- The scale of the initiative or project proposed is sufficient to meet the intent of 'large-scale' from an ecological perspective (that is, a multifaceted approach to enhancing the overall biodiversity of an area, rather than focusing on one element such as invasive mammal control).
- Criterion should be weighted towards allowing for an increase in scale and/or impact of those projects and initiatives that are already in place (rather than funding new projects or ideas), are already contributing achieving environmental outcomes and that are able to demonstrate value for money.
- Criterion should be weighted towards investing funds to legal entities who are able to demonstrate that they have the capacity, capability, and stability (governance and financial for example) to deliver a 'large-scale' initiative.
- Initiatives/projects need to be community-led with a high degree of collaboration at all levels of the system (including local authorities, mana whenua, landowners and other stakeholders).
- Criterion should be weighted towards supporting applications from umbrella entities and/or collectives of organisations (but only where appropriate governance and management structures are in place to effectively deliver on requirements).
- The permitted use of the funds should allow for all types of costs to be met that are deemed reasonable and relevant including staff and personnel costs, administration and overhead costs, and costs to support education, evaluation, and monitoring of deliverables.
- The term and value of the investment granted should be viewed as a two-year investment initially, with opportunities for right of renewal is performance is satisfactory, and funding is ongoing. A maximum term should be outlined to ensure a long-term reliance on council funding is avoided.
- There is collective commitment from ORC and the community organisation/provider to work together in partnership, with the intention of further enhance collaboration, community activation and sustainable funding and leverage opportunities beyond the maximum term of investment.



Literature Review

Phase Two of this project required us to conduct a comprehensive desktop review of the literature from New Zealand Aotearoa and overseas to identify the trends and challenges in community environmental funding and stewardship that existed. This was to not only investigate and understand the most effective environmental initiatives being led and delivered but to also understand what the research and evidence says about the most effective grant making and funding approaches available to ORC.

To inform our approach and recommendations, we sought out, reviewed and considered a large body of evidence-informed or evidence-based data and research that included academic and journal articles, programme and project evaluations, independent reviews and investigations as well as several legislative and regulatory documents, both from New Zealand Aotearoa and internationally.

A detailed summary of this literature review is included in Appendix 2 which outlines the key themes and outcomes from our review of the literature against a number of parameters including:

- The effectiveness of contestable (competitive) vs directed (non-competitive) funding models.
- The effectiveness of funding project delivery vs funding system enhancement, capability building and collaborative activities.
- The effectiveness of investing in ‘umbrella’ entities to achieve efficiencies and outcomes vs repetitive funding into singular entities.
- The evidence linking the length of time investment with the likely achievement of outcomes.
- Evidence indicating the level/value of funding required to warrant the achievement of outcomes or impacts.
- Evidence on the effectiveness of joint funding arrangements either between public agencies or between the public sector and the community and/or charity sectors.
- Existing examples of definitions of large-scale and landscape scale that may be applicable in the ORC context.²⁰
- Examples of funding models, programmes or initiatives that have been successful in sustaining long-term delivery, attracting and leveraging additional funding or attracting significant third-party investment (both within and outside of the environment sector).

²⁰ Note our findings from this area of the literature is outlined and discussed in Section 4.

Legislative and regulatory documents as well as key research and evaluations into grant making activities have been used to inform our assessment and analysis of each funding model outlined in Section 7 and are not necessarily referred to in this section of the report. A full list of the references used in the development of this project are outlined in Section 13 of this report.

The narrative in this section should be read in conjunction with the key themes and feedback we obtained during the partner and stakeholder consultation process (which is outlined in Section 5), as together, these sections identify and outline consistent themes and challenges facing the environmental sector towards achieving sustainable and impactful organisational and environmental outcomes into the future.

Our review of the literature did not provide us substantive concrete evidence that would recommend one single, ‘right’ approach to funding model design and implementation. As is often the case with research, there are differing views or opinions present and there are several external factors that contribute to the success of each initiative, programme or project, such as socioeconomic or political factors. Success can be highly situational and contextual, and not always attributable to the funding model used to support project or programme delivery.

What is clear from our review, is that the body of evidence to support councils and other funders to make effective decisions regarding their funding model design and implementation, is still evolving. There are however consistencies in the trends that emerged from the literature which are summarised below:

- **A movement away from competition to collaboration:** There is consistency and alignment with the view that competitive funding models are detrimental to sector cohesion and the achievement of outcomes. This is evidenced in other sectors outside of environmental management or conservation.
- **The need to professionalise community efforts:** Embedding paid staff and building the infrastructure to support the wider system is vital to achieving outcomes. Having the right expertise to activate volunteers enhances impact.
- **Sustainability needs to be a core guiding principle:** Both ecological and financial sustainability require long-term thinking and a commitment by funders (both government and non-government) and community organisations.
- **Systemic flexibility and responsiveness:** System leadership (which in this case should be provided by ORC) requires a purposeful effort to provide adaptive funding, streamlined processes, and reduced administrative burden for all parties. This requires a deliberate intention to change behaviours and support the system to create a culture of self-sufficiency and sustainability that reduces the reliance and expectation of long-term and ongoing council investment.





Partner and Stakeholder Consultation

A valuable component of this project was to obtain the views and insight from a range of partners, stakeholders (and future potential partners) in relation to current environmental funding models, as well as canvassing thoughts and opinions in relation to future funding models and focus areas for investment.

ORC requested that we speak with their partners and various stakeholders to obtain feedback and insight from:

- **Mana whenua**, initially via Aukaha and Te Ao Marama, with individual rūnaka subsequently invited to participate to gain a better understanding of their intergenerational aspirations for the biodiversity of the region. Note that as part of this process, no individual meetings were held with representatives from Te Ao Marama or any of the papatipu rūnaka.
- **Territorial authorities** located within the ORC boundaries to gain a better understanding of their current biodiversity investment approaches, as well as their views and aspirations for the future large-scale environmental fund.
- **Environmental groups and delivery partners across Otago** that may or may not receive (or have received in the past) funding from ORC to deliver environmental projects or initiatives.
- **Community and philanthropic funders across Otago and nationally**, to better understand their funding drivers and constraints in relation to supporting investment in environmental initiatives, and the potential for future strategic and operational funding alignment.
- **Government agencies and departments** who have a strategic role in environmental management, or who have undergone significant challenge or change in their funding models in recent times.

- **Other local authorities across the motu** (including city, district and regional councils), who currently have either large-scale funds in place, or who manage, administer, co-fund or strategically support several different models to support biodiversity outcomes in their region.
- **ORC Councillors** who play a key role in governing the future development and use of these funds. Engagement with Councillors was conducted via two interactive workshops, Councillor Workshop 1 was held in October 2024 and Councillor Workshop 2 was held in February 2025. Copies of the PowerPoint Presentations and pre-reading packs distributed to Councillors as part of these workshops is included in Appendix 3 (Workshop 1 – Presentation); Appendix 4 (Workshop 1 – Pre- reading and survey); Appendix 5 (Workshop 2 – Pre-reading pack); and Appendix 6 (Workshop 2 – Presentation).

A list of the organisations consulted as part of this project are outlined in Appendix 7, with examples of the questions asked for each type of stakeholder, outlined in Appendix 8 (letter to other local authorities), Appendix 9 (letter to community stakeholders) and Appendix 10 (letter to rūnaka).

It was important that this process allowed stakeholders to provide honest and open feedback in relation to their experiences with funding and contracting in the past and provided the opportunity for them to discuss their challenges openly with the project team. Given that many of these interviews involved the sharing of commercially sensitive information, and/or that ORC is, or has been their funder, the decision was made that the actual data collected from our interviews was to be kept

confidential to the project team and stakeholder in order to preserve the relationship that existed between the stakeholder entity and ORC.

The key themes are summarised below and have been grouped by partner/stakeholder type as identified above.

6.1 Mana whenua

Mana whenua is both a key statutory and strategic partner to ORC and plays an important role in informing the future direction and decisions regarding the investment in 'large-scale' environmental initiatives and projects. During this work, ORC staff consulted with mana whenua via the ORC Mana-to-Mana forum to seek advice on how rūnaka should be engaged and involved in this process. The project team was advised that Aukaha and Te Ao Marama were the best points of engagement, with the opportunity extended to individual rūanaka to be consulted as part of this process. Contact was made with both organisations and a subsequent meeting held with Aukaha.

During our partner consultation, Aukaha facilitated communications with papatipu rūnaka on ORC's behalf, inviting them to participate in this process and offer their thoughts around possible strengths, opportunities, concerns, risks, and challenges they saw through the establishment of a large-scale fund. They were also asked to contribute their thoughts on the scope of a 'large-scale' definition and the parameters of a criteria that could be used for such a fund, as well as the environmental priorities the investment should focus on.

Although no formal hui was held with a collective group or individual rūnaka as part of the project, through our informal discussions with both Aukaha and individuals representing their rūnaka (for example, Edward Ellison), both water quality and the ongoing protection of, and access to mahinga kai was mentioned as being strategically important to mana whenua. It is recommended that further discussions are held with rūnaka, either individually or collectively before parameters or requirements/criteria for a 'large-scale' fund are agreed and implemented.

6.2 Territorial Authorities in Otago

Under the Local Government Act (2002) (LGA), there is a clear delineation of roles and responsibilities for local authorities, with the regulatory roles of regional and unitary councils of protecting the environment made clear in the legislation. However, all local authorities play an active and important role in the protection and enhancement of their natural environments, either in their obligations under the RMA (1991), or through priorities identified by their ratepayers in the long-term planning processes.

Within the ORC boundaries there are six local authorities (including ORC), each with a very different ratepayer base, geographic landscape, and each facing very different, but equally significant environmental challenges. These issues range from environmental degradation caused by climate change factors such as sea level rise, or degradation caused by massive urban development in areas such as Central Otago.

As part of this project, we met with a variety of staff at Waitaki District Council, Clutha District Council, Dunedin City Council, Central Otago District Council, and Queenstown Lakes District Council, who all have an operational, regulatory, and strategic relationship with ORC. These discussions were collaborative and engaging, with staff in these local authorities dedicating significant time, attention and care to provide input and data to support this project.

As outlined in Section 3.7.2, all five local authorities across Otago are currently administering and investing in their own biodiversity grant allocation processes. These processes are currently more aligned to the ORC ECO Fund Model, rather than supporting large-scale investment.

As outlined in the earlier tables, in most cases, the funding the local authorities have available is small, is one-off, and is used to support project costs for community groups or private landowners (such as financial support for pest management).

Throughout the discussions, a range of challenges were raised that are important for ORC to consider in the development of their future 'large-scale' environmental fund. These challenges should also be considered with the context of ORCs other existing grant making and funding structures. The key challenges identified were:

- It is not clear what the definition of 'large-scale' should be, but determining its meaning within the Otago context is vital.
- The current focus on contestable funding and grant allocation processes places a significant administrative burden on staff, especially when the pot of funding available is small and the funds are continually over-subscribed.
- The community groups delivering on the ground are struggling financially and with ongoing cuts to council and central government budgets, there is no reprieve in sight for them.
- Local authorities urged a level of caution to ORC that the new 'large-scale' fund does not perpetuate the reliance on short term funding for groups/organisations, nor that it focuses on investing in new projects.
- There is a desire for a more strategic approach to funding and investment decision making across local authorities in the region to ensure that investment is not being duplicated, to ensure that investment decisions are efficient and effective, and that collectively across the region there is a focus on the achievement of outcomes, supported by best practice and environmental priority.
- Councils may not always be well informed about what projects and initiatives are being funded in neighbouring areas or what is being funded across boundaries within the Otago region. This may be contributing to duplication or gaps in what councils are funding and supporting at a region wide level.
- There is a perception that there is still a lack of up-to-date research and monitoring data to support funding decisions and to provide evidence whether the gains made are sustainable.

The specific themes and recommendations that were made by the local authorities in relation to the development and implementation of a 'large-scale' environment fund were:

- Consideration should be given to the development of a region-wide funding strategy solidify the definition of 'large-scale' funding and how this could complement the 'small-scale' investments and grants that are being made by the other local authorities.
- Ideally large-scale investment decisions would come following the completion of the new/refreshed ORC Biodiversity Strategy.
- Future 'large-scale' environmental funding should focus on the achievement of intergenerational and ecosystem level outcomes.
- It was important to the local authorities that ORC acknowledged that the environmental issues facing each region are different, as is the capacity and capability of environmental organisations and community groups within those areas to deliver a programme or project of 'large-scale'.

6.3 Environmental Groups and Delivery Partners across Otago

There are many volunteer and not-for-profit entities around the region who play a key role in protecting the environment and biodiversity of their local communities and land. These groups range from small volunteer led landowner and resident groups, through to large established charitable trusts who receive funding directly via a government appropriation. In recent years, there has also been a rise in the number of 'umbrella' type entities (both regionally and nationally), who play a key role in supporting the governance and/or operations of groups of smaller entities to create alignment in service delivery and efficiencies in operations (such as Southern Lakes Sanctuary Trust). These groups can focus on aligning the activities of groups working to address a particular environmental issue – such as predator control, or increasingly, they work to coordinate and support the activities of organisations working across multiple environmental domains to achieve landscape scale impact.

These environmental groups and delivery partners receive funding from a range of sources, with the ORC and other local authorities in the region being a key contributor to their activities. Local philanthropic funders such as the Otago Community Trust and Central Lakes Trust have also supported these organisations in the past or currently, with some organisations reporting that they have received or are receiving one-off project grants or have multi-year agreements in place to support their ongoing administration and salary costs.

Most organisations reported receiving funding from multiple sources, and that there was an urgent need for them to investigate and secure additional funding sources to remain financially viable, particularly in the wake of JfN funding ending. The organisations we spoke to also noted that this was becoming increasingly difficult in the current economic environment.

Within the current funding structures of councils (and in some cases community funders), all environmental groups we met with spoke openly regarding the challenges they face when looking to secure ongoing funding. These were consistent across all groups, regardless of their size and structure, and these are important points for local authorities and ORC to consider when making future investment decisions.

The key challenges reported by environmental groups and delivery partners included:

- **The existence of short-term (usually annual) funding cycles and contracting.** While providers understood the political and budgeting cycles of councils (and central government), short-term funding agreements and one-off grants made it hugely challenging for the groups to develop effective long-term strategies or work plans, retain pain staff, or to leverage additional funding without longer term investment security.
- **The application process to obtain these small or one-off grants is incredibly resource intensive and time consuming.** Some groups told us that they are having to secure a paid resource or employ staff to focus on making repeated grant and funding applications – often seeking funding to retain their own paid role within the organisation. They noted that each organisation (including local authorities) and Fund has their own application processes, criteria, and accountability requirements, which can be confusing for groups and create inefficiencies. Frustrations were also noted with the misaligned timing of council grant application processes when these funds are open and closed at different times of the year. Groups noted that these systems were not sustainable in the future.
- The structures and parameters of many of the Funds that these groups can currently access **inadvertently encourages competition between organisations** and are not conducive to encouraging or enhancing collaboration between providers.
- **Funding is often siloed into pots to address a certain environmental or biodiversity issue** (such as pest management or weed management), and while these activities are distinctly different in nature (and cost), achieving real gains often requires an ecosystem approach which is not easy to achieve within current funding structures.
- **Activating volunteers is incredibly challenging without having paid staff** to undertake robust planning and allocation of volunteer time and resources.
- **Obtaining funding to support the maintenance of existing activities is challenging**, as many Funds target investment towards new projects or activities. Providers also reported that they face similar challenges in securing commercial or corporate sponsorship or support, as these businesses are keen to support 'exciting' activities over the more mundane maintenance work that is needed (for example, sending staff to support tree planting days rather than clearing possum traps or releasing plants).
- **Obtaining funding to support education and public relations activities or to effectively evaluate activities and projects was equally difficult to secure.**

Through the discussions, the following key themes emerged that identified options and opportunities for the 'large-scale' environmental fund. These included:

- The opportunity to build stronger relationships between funders (ORC and other local authorities, as well as between local authorities and philanthropic funders) was seen as strategically important to enhancing and supporting stronger collaboration on the ground between organisations.
- It will be vitally important that ORC is able to clearly articulate their vision, aspirations and priorities for the use of the funding, as well as having a clear and criteria reflecting these to ensure that there is clarity on the role and purpose of the 'large-scale' environmental fund. This will allow organisations to clearly determine whether they meet the capability and capacity requirements and expectations of council. Organisations noted that they did not want to undertake resource intensive proposals for funds they had no likelihood of securing.

- There is a desire for this funding to be used more widely than just for the purposes of project delivery. Organisations saw opportunities for the 'large-scale' funding to contribute to enhancing organisational capability, as well as supporting training and education activities for landowners and communities, or to support organisations with evaluation and monitoring activities that would allow them to better articulate the impact and value of their work.
- Community and engagement with the sector will be critical following ORC decisions, as providers will need time to determine how they will respond to a funding proposal, consolidate, and upscale (work and resources) to effectively deliver if successful. This may also include the need to leverage additional funding, depending on the agreed criteria.
- Regardless of the funding mechanism used to allocate 'large-scale' funding, organisations expressed the need for strong leadership and clarity from ORC, noting that they will require ongoing support, if successful in obtaining funding, to ensure they can effectively deliver the outcomes sought.
- Overall, the groups we met with were not supportive of establishing another contestable grant process to allocate 'large-scale' funding, nor did they want to see a focused investment on new projects or initiatives. There was a strong desire for longer-term funding agreements (no less than three years), if ORC wanted to achieve environmental impact and foster collaboration. Some felt that there are already many organisations trying to achieve the same thing in the sector, and a funding mechanism that focused on reducing duplication and addressing gaps within the system would be of value to all groups.

6.4 Community and Government Funders

We undertook limited consultation with community funders and government departments who provide direct funding to community groups and organisations – both within, and outside of the environmental sector. It is important to understand that many entities invest in environmental initiatives outside of local authorities, such as government departments (for example, DOC via their Community Fund – Pūtea Tautiaki Hapori, which is allocated nationally to support community-led conservation projects on public and private land), Class Four Gaming Funding (allocated by organisations such as Pub Charity Ltd, for example), and philanthropic trusts and community foundations (such as Otago Community Trust or the Whakatipu Community Foundation).

Most of these entities have a much broader remit than just supporting environmental projects and initiatives (and some we spoke to don't fund environmental initiatives at all). The purpose of our consultation with these groups was two-fold, firstly to understand their current funding activities and investment decisions in relation to large-scale projects and/or environmental initiatives, and secondly, to assess the appetite for a collaborative or co-investment arrangement with local authorities or regional councils in the medium to longer term.

The feedback relating to their funding priorities and processes highlighted that for these organisations, their Constitution or Deed directs where and what the organisation invests in/ donates to, both from the type of investment made and the geographical area that the investment/donation needs to be directed to. For these entities, if investing in environmental initiatives is strategically not currently a high priority, redirecting investment or donations to this area would require changes to strategic documents and/or approval by their Board. For those philanthropic organisations, investment and donation decisions were often driven by specific donor requests or bequests with no

ability to deviate from the explicit wishes of the donor. This could impact on the ability of these organisations to work with local authorities but should not preclude it.

The funders we consulted spoke of their deliberate and strategic shift away from providing one-off and annualised grants or project funding, where they could. They echoed the challenges with these processes that we have already identified in this report in our literature review and stakeholder consultation. The funders we spoke with noted that they were seeing better value for money in their investment through their support of longer-term funding arrangements and investment in 'system level' capability building activities.

Regardless of the approach implemented to allocate 'large-scale' funding, it would be beneficial for ORC to continue our initial discussions with these funders, to open the door to future and more long-term opportunities for co-investment and co-funding of 'large-scale' environmental initiatives in the medium term. These discussions should be expanded to a wider group of possible collaborative or funding partners than we were able to speak with as part of this project. This could include other funders within the region, such as Central Lakes Trust, or those groups with a national or international remit, such as the Tindall Foundation, NEXT Foundation, New Zealand Nature Fund, or the Nature Conservancy.

6.5 Other Local Authorities

Consulting with other local authorities around the country has provided valuable insight and the opportunity to learn from the experience of other local authorities in their grant making and funding allocation processes. In Phase 1 of this project, we were asked by ORC staff and councillors to investigate some particular models that the staff and elected members were aware were in place around the country and as a result we approached and had discussions, to varying degrees. Those councils that provided significant time and insight included:

- Auckland Council (unitary council)
- Waikato Regional Council
- Hawkes Bay Regional Council (and their delivery partner, Biodiversity Hawkes Bay)
- Taranaki Regional Council (and their delivery partner, Wild for Taranaki).
- Environment Canterbury

Many of the Councils we met with have undergone an evolutionary process to redefine and define their grant making and funding allocation processes in recent years. For some Councils, change was sparked ongoing economic challenges and the need to create efficiencies or from increasing pressure from communities or from community organisations to change the structure of investment, or to address resourcing issues created by high internal administration requirements, or to shift to more effective investment decisions that are better aligned to achieving outcomes.

Regardless of the model that each council has in place, or the level of funding they have available to distribute, all have similar experiences and face similar constraints in this area. These offer valuable insight and learnings for ORC as they move to defining and articulating what 'large-scale' environmental funding means to them. The key themes identified by other local authorities and regional councils is summarised below:



- **There is a deliberate shift away from providing short-term funding agreements** or allocating one-off funding. Councils noted that they knew these approaches provided low funding certainty for organisations which impacted on organisational sustainability and staff retention, provided a limited connection to outcomes, and created a high internal administration burden for councils and their stakeholders.
- **The impact of funding into communities has been amplified where councils have been able to intentionally fund collaborative activities or umbrella entities** that bring together a number of organisations or groups – either at a community level or by environmental issue.
- Implementing **collaborative and connected funding models is easier for unitary councils** where they have an expanded regulatory role, and are a significant landowners compared to regional councils and local authorities alone. Their expanded scope allows for processes to be streamlined, and complexity reduced due to the number of stakeholders involved.
- It is **not always possible in a dynamic and political environment to align strategy and evidence to investment and funding decisions in a linear way** and this can provide ongoing challenges to effectively align strategy and policy development with on the ground delivery.
- There is no **‘one size fits all’ approach to manage grant making or fund allocation activities** to allocate ‘large-scale’ funding. The ‘right’ model for ORC will likely depend on a range of factors such as:
 - The risk appetite of council and councillors.
 - The strength of the partnerships and relationships in the region – high trust is key for meaningful collaboration however.
 - Developing the depth of partnerships and collaborations needed to shift to collaborative funding models take significant time to embed and require ongoing evolution.
 - The funding model implemented will need to be cognisant of the capacity and capability of environmental organisations and other potential funding partners in the region and ORC may need to be prepared to provide ongoing support to grow the capability and capacity going forward.





Broad Funding Model Analysis and Discussion

7.1 Introduction

At the first workshop, council identified several possible funding models that were investigated as part of this project and determine their appropriateness in the ORC context. Six models were identified across the procurement spectrum, from upscaling existing grant making approaches, to full devolution of funding to a third-party entity. We undertook an assessment of each of the models, assessing their strengths, opportunities, weaknesses and risks, as well as identifying the operational and financial implications of their use. The findings of the assessment were presented back to council during the second workshop.

This assessment used a consistent approach for each model to determine its suitability for use within the 'large-scale' environmental funding context. This approach consisted of a review of the model against the following:

- Permitted activities under the Local Government Act (LGA) 2002.
- Permitted for use or application under the New Zealand Government Procurement Rules (4th ed.)²¹ and
- In line with the Office of the Auditor General Government Procurement Guides.
- Existing evidence, literature or evaluation on the effectiveness of the model.
- Experiences and lessons learned from entities who already have this model in place within their organisation (or who have used the model previously).
- The likelihood of the model contributing towards the achievement of the three key principles agreed by council that constitute 'large-scale' in the ORC context.

²¹ Our assessment of suitability has been made against the current Rules (4th edition) and not against the draft Rules outlined in the 5th edition. The future suitability of these models should be revalidated if substantial changes to the Rules are made prior to ORC implementing a 'large-scale' funding model or procurement approach.

7.2 Procurement & Grant Making Rules for Public Entities

Public entities have the responsibility for spending funds obtained from taxpayers and rate payers, and as such are required to adhere to stringent accountability and transparency standards when making decisions around how these funds are spent. Local authorities are experiencing significant increases in costs which has resulted in large rates increases for their communities in the last few years. This situation is unlikely to change in the short term with the ongoing cost pressures facing councils face as well as the urgent need to invest in the maintenance and replacement of strategic infrastructure.

It has never been more important for ORC to ensure that funds obtained from ratepayers are being invested in:

- Supporting the achievement of strategic and organisational goals (to plan and manage for great results)
- Achieving value for money investment (to get the best deal for everyone and play by the rules)
- The right opportunities in the right places and at the right time (to get the right supplier)
- Activities that provide opportunities to leverage and grow investment over time (to get the best deal for everyone)

New Zealand Government Procurement Rules

The New Zealand Government Procurement Rules support sustainable and inclusive procurement through the promotion of good practice for procurement planning, approaching suppliers and community contracting. The Rules must be used if procurement is valued at more than \$100,000 and if procurement is being made by a government department, by the New Zealand Police, or New Zealand Defence Force, and applies to most Crown Entities.

The current set of Rules have been in place since 2019 (4th edition) and are currently under review by the Government, with a proposed 5th edition recently released for consultation. The consultation period closed on 8 April and will be reviewed by Cabinet before confirming any approved changes or a timeline for implementation.

Under the Rules, **ORC is not mandated to apply the Government Procurement Rules but is strongly encouraged to apply them in purchasing processes and decisions.** There have been instances where local authorities have not adhered to best practice and these situations have been highlighted in a number of reviews by the Auditor General.²²

The Rules outline requirements and considerations in procurement decisions in the areas of procurement planning, market research, approaching the market, evaluating responses, and negotiating and awarding contracts.²³

The Rules are governed by five key principles and are highly relevant in not only ORCs approach to 'large-scale' environmental funding, but in all procurement decisions the organisation makes. These principles are:²⁴

- **Plan and manage for great results.** This includes identifying needs and broader outcomes the entity wishes to achieve and then outlining the roadmap or plan to get there. Establishing a team with the right mix of skills and experience is crucial, as is taking the time to understand the market and your likely effect on it. Involving suppliers early and choosing the right process relative to the complexity, level of risk and size of investment.

- **Be fair to all suppliers.** This relates to treating all suppliers fairly, making it easy to do business with government entities while creating competition and encouraging responses from capable suppliers. It includes seeking opportunities for Māori, Pasifika and regional businesses and social enterprises to be involved, clearly explaining how proposals will be evaluated and assessed, as well as giving feedback to unsuccessful suppliers so they have opportunities to improve next time.
- **Get the right supplier.** To ensure the right supplier(s) are selected, public entities need to ensure they're clear about what they're looking to purchase and how suppliers will be assessed, so that the right supplier can be selected based on capability, at a fair price, and on time. Obtaining the right supplier(s) also ensures that they're able to comply with Government Supplier Code of Conduct, and that suitable risks have been identified and managed. Creating and building demand allows for fair and productive relationships as well as encouraging and rewarding suppliers for delivering results.
- **Get the best deal for everyone.** This encourages best overall public value including whole of life costs and benefits for goods and services; while considering social, environmental, economic and cultural outcomes and impacts. The procurement arrangement needs to ensure clear performance measures are in place that are effectively managed and monitored with accountability for results in place.
- **Play by the rules.** Ensuring that public entities act with integrity, and that both parties are accountable, transparent and reasonable. Commercially sensitive information and intellectual property needs to be protected, and public entities need to effectively manage conflicts of interest and stay impartial.

OAG New Zealand Government Procurement Best Practice Guides

The Controller and Auditor General (OAG) sets out procurement guidance for public entities in its Good Practice Guide²⁵ which emphasises the importance of taking a strategic approach to managing the allocation of public funds and recommends developing and agreeing a strategic procurement plan prior to making investment decisions.

In the process to developing and agreeing the strategic procurement plan, the OAG expects that public entities have a thorough understanding of the importance of the procurement in achieving the overall goals and strategy for the organisation, the types of procurement available, and the value and risks associated with the procurement.

Although the key output of this project was to produce a final report and recommendations for council decision making, it does serve a secondary purpose as the content of this report includes the key components required in a Strategic Procurement Plan, and therefore, meets the AOG expectations in this procurement planning.

The best practice guidance provided by the OAG and probity auditors, provides clear recommendations on how purchasing decisions should be conducted through the procurement review process – including the level of independence that is required in the evaluation of proposals seeking investment. This strongly advocates for processes that are conducted independently of elected members and independently of those staff who have a close relationship with those who are seeking funding.

²² Engagement of consultants by Horowhenua District Council — Office of the Auditor-General New Zealand, Queenstown Lakes District Council – Development of Lakeview land — Office of the Auditor-General New Zealand, Local government procurement — Office of the Auditor-General New Zealand

²³ Guides | New Zealand Government Procurement

²⁴ Government procurement principles | New Zealand Government Procurement

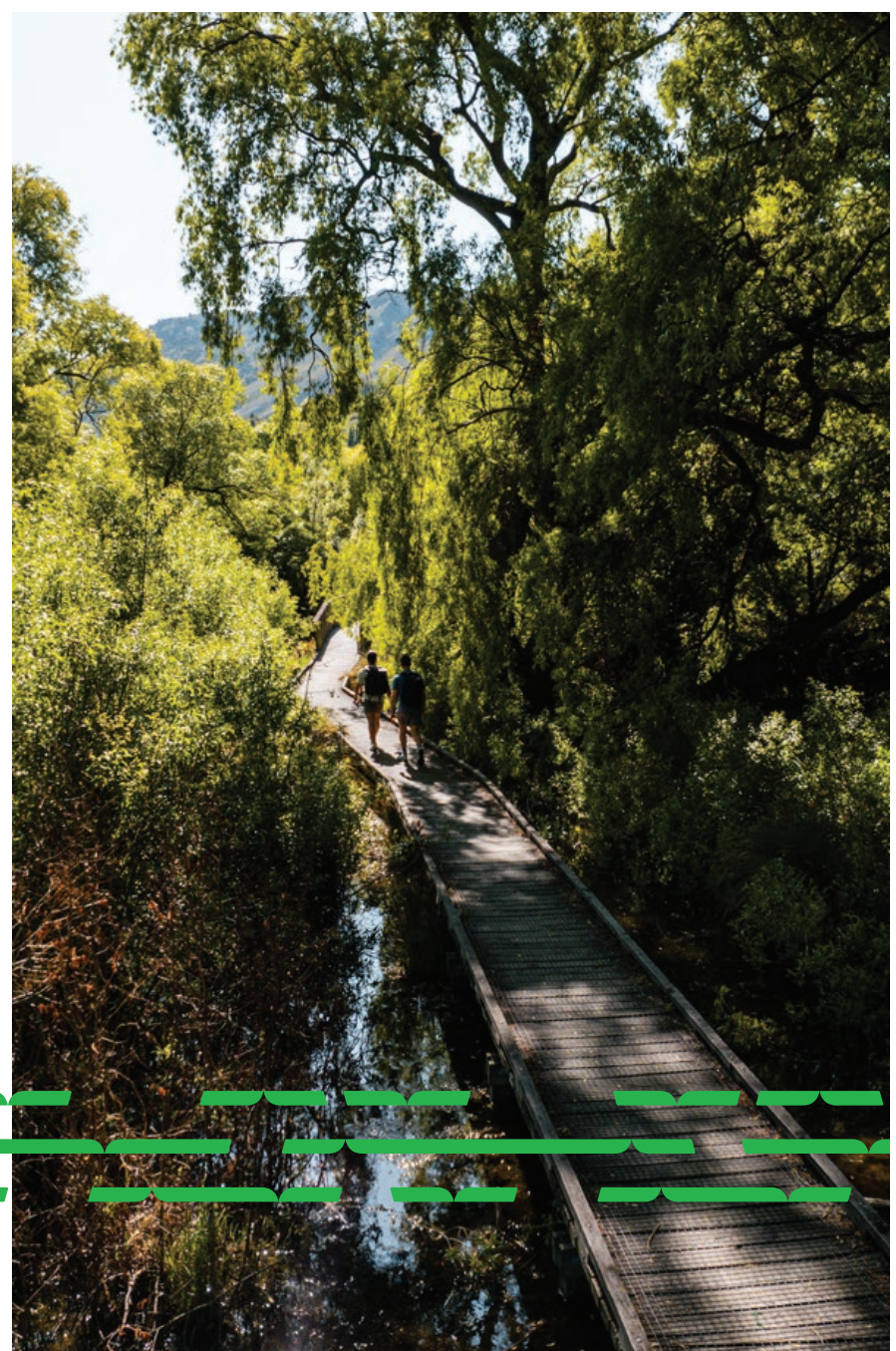
²⁵ Procurement guidance for public entities

We support this approach and recommend that the allocation of 'large-scale' funding is conducted independently of elected members and staff working closely with communities for the following reasons:

- Effective management of perceived or actual conflicts of interest, especially when procurement decisions may involve community organisations or groups representing the community that members are elected to represent, or where staff have worked closely with that organisation (such as in the development of a Catchment Action Plan).
- Elected members are unlikely to have the level of training, qualifications, and expertise required to lead a public sector procurement process.
- Elected members and senior managers (particularly and in this case, specifically CEO and ELT) have several competing commitments and are unlikely to have the time needed to effectively participate in procurement review processes.
- The division between governance and management needs to be maintained with the role of elected members to ensure that the professionals providing the advice are qualified and equipped to do so, not that elected officials are making management recommendations in place of this.

Throughout Sections 7.4.1 – 7.4.6 we outline the proposed procurement approach that in all cases aligns to best practice – assuming that elected members and key staff are not involved in the review process. However, this does not assume any deviation from key council policies – such as ORC Delegations of Authority policy, and it is likely that any procurement (under any model) would not proceed without a level of council endorsement or approval prior to contracting and implementation, depending on the requirements specified in ORC Delegations of Authority policy.

In these sections we have also assumed that the agreed principles and outcomes are the drivers for the 'large-scale' funding approach. Lastly, we have also assumed under all models that an agreed eligibility criteria also drives funding allocation decisions.



7.3 Procurement Approaches and Prioritisation Framework

Permitted Procurement Approaches

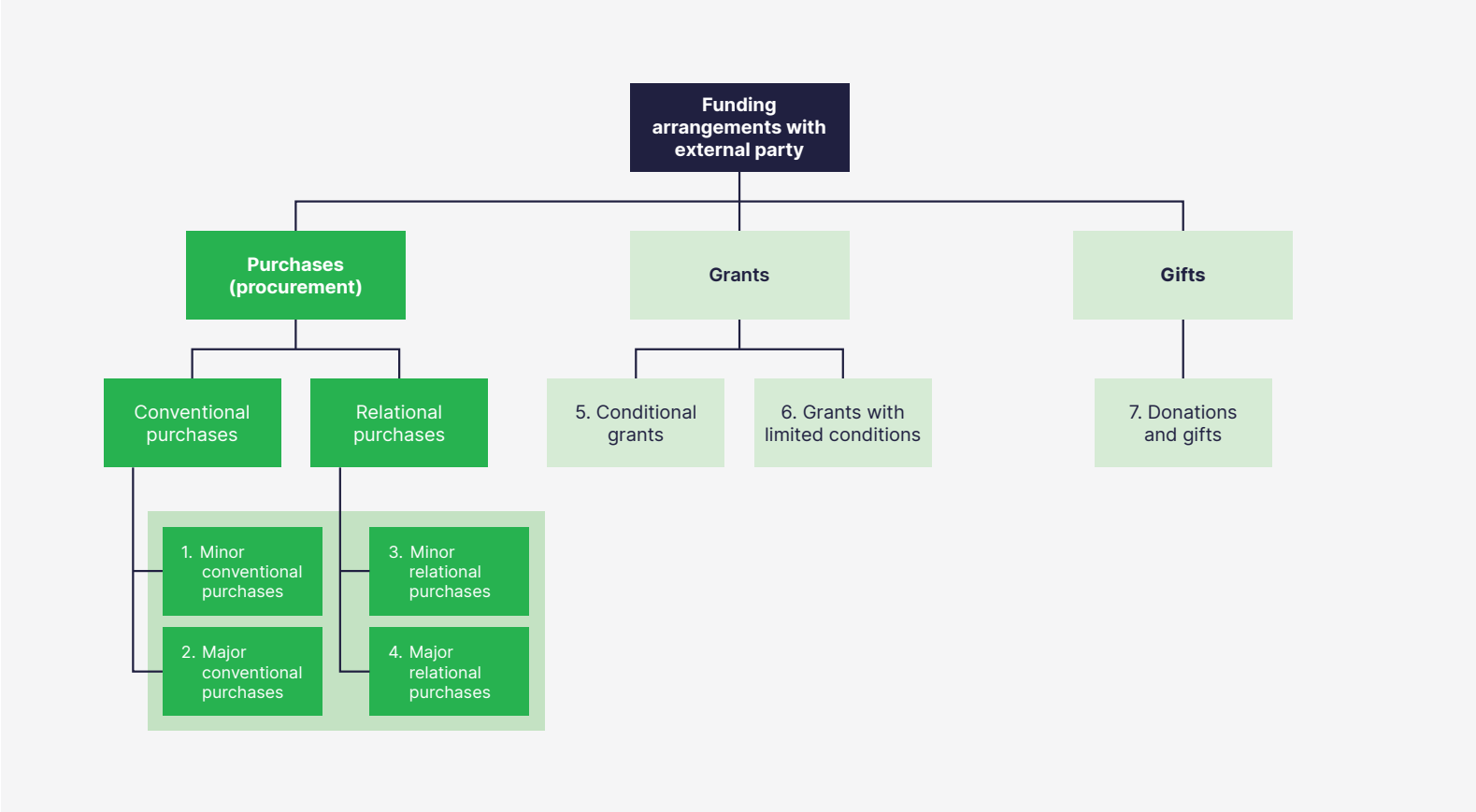
The AOG breaks down funding arrangements with external parties into a number of categories that seek to provide guidance on the type of arrangement or contract that should be used. The most suitable arrangement is based on the intent of the purchase, the procurement methodology needed, the type of contract to be used, the market, and the value of the purchase. These approaches are outlined in Figure 7 below.

For the purposes of this project, 'large-scale' environmental funding would be deemed either a **purchasing (procurement) arrangement or a grant making arrangement**. We have excluded gifting as we do not believe this to be an appropriate funding category to allocate ratepayer funds.

Under a purchasing or procurement approach, we have made the assessment that investment in environmental initiatives or projects would constitute either a **major or minor relational purchase** as more conventional purchases relate to the purchase or development of capital. If considering a grant making approach, we have determined that 'large-scale' environmental funding would be **considered a conditional grant, allowing for reasonable and appropriate accountability of expenditure**. For clarity, the current ECO Fund (General Fund) would be considered a conditional grant.

Our assessment of each funding model considers which arrangement would be most suitable or applicable in each situation and whether the model aligns to one of these funding arrangements.

Figure 7: Categories of Funding Arrangements with External Parties²⁶



26 Taken from the AOG Procurement Guidance document [Part 4: Types of funding arrangements with external parties](#) — Office of the Auditor-General New Zealand.

Procurement Prioritisation Frameworks

In the process of preparing a strategic procurement analysis, it is good practice to undertake a prioritisation exercise utilising a matrix approach to help identify and determine strategic risks and opportunities, potential costs, or value that can be sought from procurement decisions.

During the second Councillor Workshop, councillors were guided through this process, using the six models were initially undertook an assessment of. There are a range of models that can be used to undertake this exercise – and in our assessment, we used a comprehensive matrix known as the RVCE Matrix for Decision Making (Risk, Value, Cost, Effort), which is widely used in project management methodology. It supports decision making and prioritising decision making to assist leaders in developing actions, projects, and decisions that should be avoided, investigated further, considered and prioritised.

Alternatively, the OAG suggests a basic four quadrant approach to identify risks to the organisation from poor contract performance against each dollar spent on the procurement. Examples of these two models are outlined in Figures 8 and 9 below.

It is important to note that no matrix is perfect but does allow for some objectivity in decision making and prioritisation activities. In this context, the experience with Councillors was no different, and while some options did not neatly fit into a certain matrix, or there were differing views about placement, the exercise did allow councillors to identify those models where the risk was either too high, the cost too high, and/or the value too low, to warrant further investigation. The models that were discounted for further analysis are included in the section below; however, if they have been discounted from further investigation, this will be noted.

Figure 8: Analysing type of procurement to identify procurement method²⁷

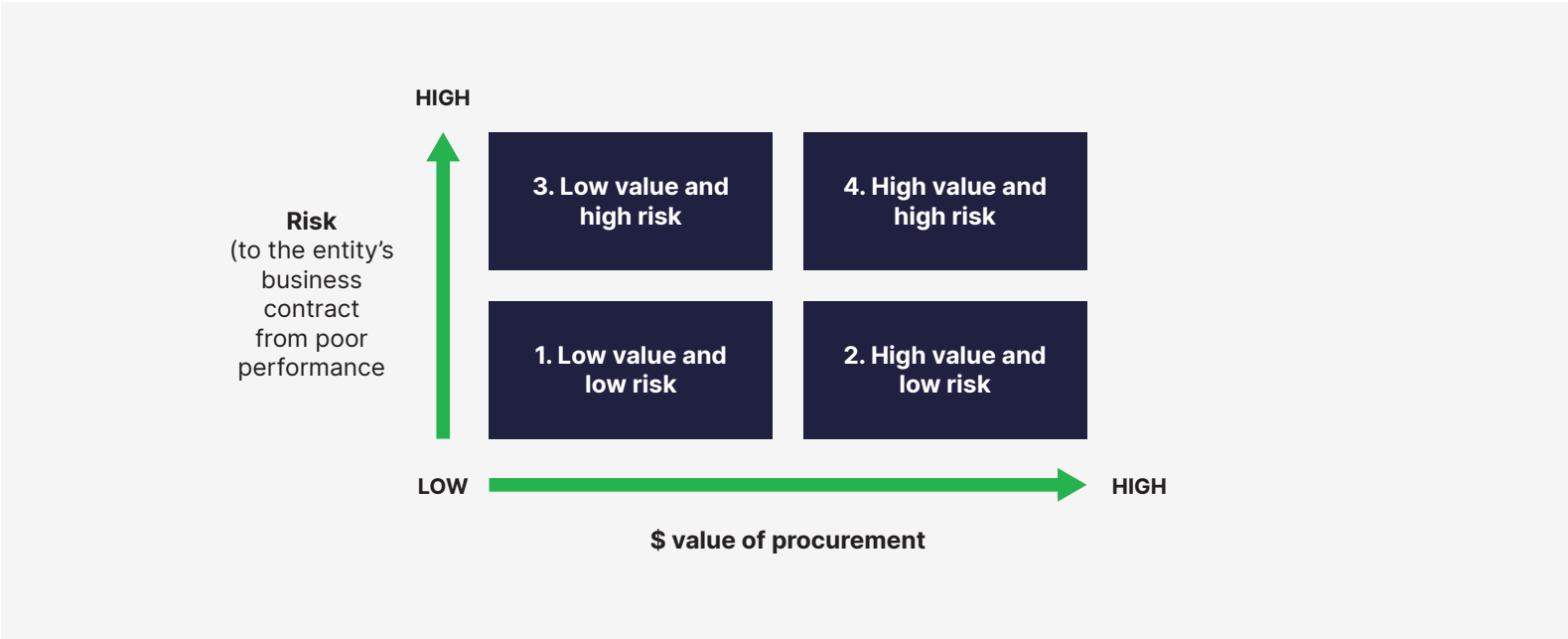
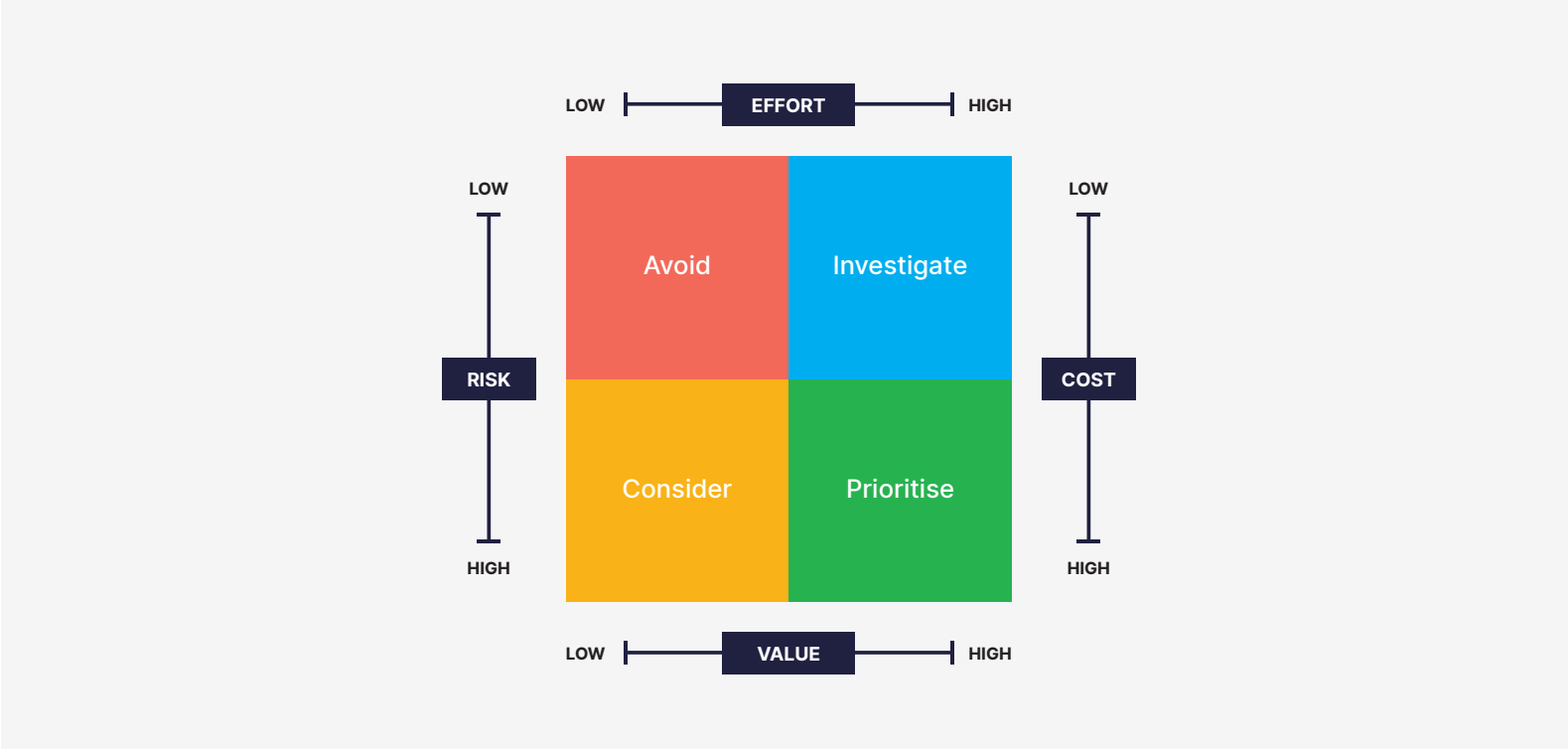


Figure 9: Risk – Value – Cost – Effort Matrix



²⁷ Taken from AOG Procurement Guidance document.



7.4 Funding Model Options

The six models identified during Workshop One and assessed as part of this project fall along a continuum of complexity and risk. The models that were initially considered are outlined below including:

- Large-scale contestable funding or grant making activities (an expansion of the existing ECO Fund).
- A structured procurement approach – such as an ROI, RFP or direct engagement as a relational purchase.
- Funding ‘large-scale’ initiatives via the Integrated Catchment Management (ICM) Programme or by Catchment Action Plans (CAP).
- Devolving ‘large-scale’ funding to a third-party entity (such as a charitable entity or council-controlled organisation [CCO]) to administer on behalf of ORC. This could include the requirement to also grow the value of the investment available.
- Entering into a joint venture (such as a collaborative funding arrangement or co-funding arrangement) with entities which could include neighbouring local authorities, philanthropic funders or a mana whenua partner.
- Establishing a new council-controlled organisation as a non-profit making entity (such as a Trust) to administer the funding on behalf of ORC. This could also include the requirement to leverage additional bequests, donations and investment to grow the overall value of funding available to invest in large-scale initiatives.

Under each model we provide a description of the model and its key features in relation to its use to manage and administer ‘large-scale’ environmental funding for ORC. We include an explanation of how we would envisage this model to be governed and managed in practice, and provide an assessment of the likely strengths, opportunities, challenges and risks of the models use by ORC. This further outlines the operational and financial considerations that ORC should take into account in the assessment of the suitability of the model. Finally, our assessment and analysis considers the likelihood and relevance of the model aligning to the principles and outcomes that ORC seeks to achieve under its definition of ‘large-scale’.

7.4.1 Large-Scale Contestable/Grant Making Fund

Introduction to the Model and Procurement Approach

This model would not look dissimilar to the grant making and funding approaches already being used by ORC such as the ECO Fund. Under this model, 'large-scale' funding would be allocated via a contestable process that would constitute a **conditional grant** under the Government Procurement Guidelines.

The model could be implemented within the current ORC grant system and structures and could run alongside the current ECO Fund process and timing. The additional 'large-scale' investment could be added to the existing ECO Fund budget, with a specific 'large-scale' category being added to the fund or alternatively, these funds could be added to the existing \$450,000²⁸ tagged to 'large-scale biodiversity initiatives' fund that is already established under the ECO Fund (General).

Currently, the ECO Fund is administered on an annual basis, with applications received in March. If 'large-scale' funding was to be added to the ECO Fund, consideration would need to be given whether the new money was administered within, or outside of the current grant making cycle. If aligned to the ECO Fund, applications would not be received until March 2026, resulting in a considerable time delay from the 2024-34 LTP decisions. Establishing a stand-alone funding round outside of the ECO Fund would allow for better management of workload and capacity for both ORC staff and community organisations and would allow for the 'large-scale' fund to develop some independence from the ECO Fund process.

Governance of the Model

This model would be governed in a similar way as currently occurs under the ECO Fund with final investment decisions either being endorsed, or approved by Councillors/Council, depending on the value of the grant (as per the ORC Delegations of Authority policy).

It would be the role of Council to ensure that appropriate grant making best practice and organisational policies have been adhered to, and that value for money decisions have been made as a result. It would not be the requirement or expectation of governance, to review grant applications and make allocation decisions as this would be an operational and management function, unless required under the Delegations Policy.

Council would likely be asked to endorse procurement recommendations and approve the overall allocation of funds under the 'large-scale' grant. They would then receive regular updates on grant implementation and performance as required.

Fund Allocation Process

Under the existing ECO Fund, ORC has a robust criterion in place to administer the fund, including appropriate documentation and processes to support the application process (including an online portal), undertake review of applications and to monitor the delivery of projects to monitor accountability. Although these processes are in place for the ECO Fund currently, the addition of 'large-scale' funding would increase the pool of funds under this grant significantly (by 208%) which would add complexity to the current processes.

In the development of a 'large-scale' contestable fund, ORC would need to develop separate eligibility criteria, application forms, evaluation criteria and funding agreements to reflect the differences in this fund compared to the current ECO Fund parameters.

Consideration would need to be given to the number and value of the grant rounds held to ensure there is no duplication or confusion created between the 'large-scale' fund and the ECO Fund process. If aligning this fund to existing processes, it could be assumed that this grant would be offered annually, which will significantly impact on staff time and resource.

An independent appointments panel would convene and review the applications against the evaluation criteria set by ORC. It would need to be determined whether the Panel was the same or different to that convened for the ECO Fund, and the timing, number of applications received and level of complexity in the review process, would likely dictate whether two different panels were required (but it is assumed that it would).

Ongoing Management of the Model

The ECO Fund is currently managed and administered in-house by the Environmental Delivery Team, with many staff (across many teams) contributing to the administration of the Fund across all stages – from the application process, to providing Panel oversight and review input, to contract/grant award, to monitoring project implementation. In this contestable model, the 'large-scale' funding would be included under the current management model, with this fund also overseen by the Environmental Implementation Team.

Following the grant allocation process, ORC staff would be required to oversee the implementation of projects, ensure accountability documentation is completed and that funds are spent within the agreed parameters. While this report does not specifically recommend an increase in number of staff to manage this process, it is possible that additional resources would need to be allocated to support the administration and management of this Fund. Higher value investment brings higher risk, and therefore the requirement for more robust and complex contracting and monitoring to be in place. It is unlikely that this could be effectively managed within current resources within the Environmental Implementation Team.

Likely Timescale to Full Implementation

This model could be implemented reasonably quickly given the structures are already in place to manage and administer the process. Time would still need to be taken to prepare and develop appropriate documentation to govern and administer the application process.

ORC would need to undertake considerable marketing and communications exercises ahead of opening a 'large-scale' contestable fund, to ensure that there was an understanding in the sector of how this fund differed from the existing ECO Fund categories. This could delay the release of the funds but would reduce ambiguity and hopefully inefficiencies that could be created by organisations applying to the 'wrong' fund.

Suitability of the Model Against 'Large-Scale' Funding Outcomes and Principles

Intergenerational Impact – this model encourages short term investment, focused at project level investment, usually with a singular organisation or entity. There are opportunities to enhance the criterion for the allocation of this funding to better align with the outcomes sought, however this type of fund is usually focused on short term investment, aligned to inputs and outputs.

Facilitation of collaboration across the system – funds of this nature are usually highly contestable and do not foster a system level approach to investment and delivery, and they usually deter or discourage collaboration. While a new criterion could support or enable collaborative proposals or approaches (or look to fund umbrella type entities), in the short term the current system and structures have not likely evolved enough to enable or support this collaborative investment.

Alignment to organisational strategy and strategic direction – this model can enable alignment to strategic direction by determining priorities within the fund criterion, however this type of fund typically requires tight parameters to allow for equity and consistency in evaluation and review of applications. This can reduce the level of innovation and experimentation that can come through a less rigid procurement framework and approach.

²⁸ This is the value approved in 2024/25 FY with funding between \$50,000 to \$150,000 per project, currently available to support projects that will take up to three years to complete.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

In our review of the literature and from the feedback we received in the stakeholder interviews, we formed an assessment of the strengths, opportunities, weaknesses, and risks of this model that ORC considered during the second Council Workshop. A summary of this analysis is outlined below. In addition, further operational and financial considerations for ORC are also outlined in this section.

7.4.1 Large-Scale Contestable/Grant Making Fund	
Strengths	<ul style="list-style-type: none">▪ The administration and management of the funds can be undertaken internally within the existing systems that are already in place.▪ This model could be implemented within a short time frame (quick to stand up).▪ Has the ability to fill an immediate gap created by the ending of Jobs for Nature funding.
Opportunities	<ul style="list-style-type: none">▪ Allows ORC to examine and realign all types of funding under the broad ECO Fund banner to ensure that all types of 'needs' are met across the range of available funds.▪ A consistent approach to fund establishment, allocation and management can provide opportunities to better understand and articulate return on investment.
Weaknesses	<ul style="list-style-type: none">▪ Allocating large-scale funding under existing structures does not ensure that investment is made into the right places, projects and initiatives at the right time.▪ A highly competitive process reduces the ability for Council to work in collaboration with stakeholders and communities to understand where and how investment should be made.▪ A highly competitive process reduces opportunities for collaboration between communities and providers.▪ It is unlikely that the internal resources currently managing the ECO Fund process will have the capacity to stand up and administer a new funding stream of this scale without additional support.▪ This model limits the opportunity for collaborative co-funding discussions with other funders or potential partners.▪ If detailed guidance was not provided around suitable criteria and scale of investment, ORC may make investment decisions based on good ideas rather than science and evidence.
Risks	<ul style="list-style-type: none">▪ This model perpetuates the cycle of highly competitive funding.▪ The short-term nature of the current ECO Fund model reinforces short term funding arrangements which do not support staff continuity and financial sustainability for community organisations.▪ It is likely to discourage collaboration between providers/suppliers which may impact on the level of biodiversity outcomes that can be achieved.▪ May inadvertently fuel a culture of funding 'new' projects rather than maintaining existing initiatives (particularly if the current ECO Fund criteria were used to make funding decisions).▪ May create duplication or enhance gaps in areas in priority areas have been identified through other processes such as the Integrated Catchment Management programme.
Financial Implications	<ul style="list-style-type: none">▪ Can risk investing in the providers/organisation's that are able to or have the resources to write the best funding applications.▪ Investment may not be targeted towards the highest priorities or the best environmental outcomes.▪ Depending on the value of funds available and funding rounds held, it could create financial inefficiencies given the resource intensive nature of administering funding rounds and then managing and monitoring delivery – contestable funds are expensive to administer.▪ Depending on the length of investment, short-term investments are less likely to be able to demonstrate value for money or positive environmental impact.
Operational Implications	<ul style="list-style-type: none">▪ Contestable funds are incredibly time and resource intensive to effectively manage and monitor and it's unlikely that this process could be managed within existing resources.▪ ORC will need to develop and implement a clear communications strategy to articulate how this funding would be different to the existing ECO Fund which may create confusion in communities – requiring greater internal resource to communicate.▪ Consideration of the timing of this Fund will be important to ensure the workload for community organisations and ORC is balanced. The addition of extra ECO Fund application and allocation rounds will have significant operational implications, particularly if the Fund is open to anyone to apply.▪ The current ECO Fund reporting and performance monitoring is likely to be insufficient for larger-scale levels of investment and a new criterion to account for this would need to be considered and developed.▪ This model does not easily allow for sector wide or cross-Council collaboration due to the competitive nature of the application and review process.

7.4.2 Structured Purchasing Approach – Registration of Interest (ROI) and Request for Proposal (RFP)

Introduction to the Model and Procurement Approach

Under this model, 'large-scale' funding would be allocated via a **structured procurement/purchasing approach that would constitute either a minor or major relational purchase** under the Government Procurement Guidelines. Whether the purchase was minor or major would depend on the value and complexity of the purchase.

Implementing this approach would require a more detailed and structured approach than what is required under a conditional grant. This approach would see council undertake a single or multi-staged structured procurement, that require ORC to take a more proactive approach in articulating what it wants to purchase, and the criteria used to assess how purchasing decisions will be made. It could involve the use of the Government Electronic Tendering system (GETs), or another suitable procurement platform and should seek to identify suitable organisations in the first stage of procurement, via a Registration of Interest. This will allow both environmental organisations and ORC to determine who is most suitably placed to receive 'large-scale' funding. The second stage would focus on receiving detailed proposals from compliant organisations who would outline their approach (and the funding they required).

ORC may be able to make a case for a direct source approach if no suitable organisations are identified through the ROI and the RFP process. This would likely be difficult to determine as environmental organisations would likely argue that there is more than one suitable organisation across the region who would have the capability to deliver against Council's requirements. ORC will need to ensure that eligibility criteria is not too stringent or aspirational to avoid this scenario. Furthermore, investing the full budgeted amount into one initiative or organisation would create high risk for Council and would not be a recommended approach.

This structured procurement approach differs from grant making in several ways and allows for:

- Clear pre-procurement or first stage procurement requirements that allow organisations to determine their eligibility or suitability to apply. Those organisations not meeting this threshold can be excluded early in the process which saves everyone time and money.
- A clear criterion to be developed and communicated as part of the procurement process that gives community organisations clarity on what ORC wishes to purchase, and the level of capability and capacity needed by respondents to qualify.
- ORC clearly defining the outcomes and impacts it seeks to purchase but allows the community to respond to how they will achieve the outcomes and impacts (rather than setting a ceiling of funding for a project by category).
- Greater collaboration and engagement between potential funding precipitants and ORC as this process allows for the Council to undertake market briefings, allow for Q&A features through the procurement process, and pre-procurement engagement with potential suppliers (through ECI and EOI processes).
- Is a more appropriate approach to allocating multi-year or longer-term funding that are of a higher value (as service contracts are usually more comprehensive than grant agreements).

Relational purchasing allows for the building of long-term relationships between purchaser and supplier that can be mutually beneficial. This approach values collaboration, trust, and open communication beyond the transactional process to ensure certain benefits and outcomes are achieved. It provides greater flexibility for the Council to encourage or direct collaborative arrangements if the procurement process does not identify

suitable delivery partners at the outset. The procurement process also provides an opportunity for ORC to work alongside more than one possible community organisation to develop a collaborative or more cohesive relationship between ORC and communities.

It is likely that only one procurement process will need to take place over the current agreed timeframe for funding allocation (currently in the LTP as the next two financial years) to account for multi-year arrangements. This model also provides opportunities to leverage other mechanisms to renew funding past this date (30 June 2027), for those organisations meeting or exceeding their key deliverables through contracting arrangements (such as right of renewal) which can reduce the future administration burden on ORC staff and community organisations.

Governance of the Model

This model would be governed in the same way other contracting agreements are within Council, depending on the value of the contract (as per the ORC Delegations of Authority policy).

It would be the role of ORC to ensure that procurement best practice and policies have been adhered to, and that value for money decisions have been made as a result of the processes undertaken. It would not be the requirement or expectation of Councillors, to review funding applications during either stage of the process or to make overall funding decisions as this would be an operational and management function (unless outlined in the Delegations Policy).

Council would likely be asked to endorse procurement recommendations and approve the overall allocation of funds under the 'large-scale' fund. They would then receive regular updates on project implementation and performance as required under the contract/funding agreements.

Fund Allocation Process

As outlined above, funds would be allocated via a two-stage process. Firstly, interested organisations would complete a Registration of Interest (ROI) which would require them to assess their capability of delivering 'large-scale' initiatives against a pre-eligibility criterion to assess whether they qualified to submit a full proposal. The registration process would be advertised on GETs or a similar procurement platform.

Preparing for this process would require ORC to develop a full and detailed RFP document, including a weighted scoring criteria that would be provided to organisations applying. The procurement document would also need to include a response template to guide proposals and ensure that ORC captured all information sought. The procurement pack should include some guidance on the recommended maximum funding that ORC would look to contribute towards initiatives and should also clarify the maximum contract/funding period that council would expect to fund or support projects (such as two years plus possible right of renewals).

This process also provides the opportunity for organisations to submit questions and answers to seek clarification prior to submitting a proposal and further provides opportunities for ORC to host briefing sessions to directly engage with interested organisations prior to receiving applications. These processes all contribute to efficient procurement activities by front ending the planning and administration requirements early in the process and reduces the likelihood of receiving non-conforming or ineligible proposals.

Once proposals were received, they would be assessed against the evaluation criteria by an independent Evaluation Panel that consisted of suitably qualified staff (with possible outside expertise sought) with recommendations prepared for Council. Any procurement recommendation made by the Panel would likely need either endorsement or approval by Council before

proceeding to contracting and delivery – depending on the length of agreement, overall funding value and how the purchase aligned to the ORC Delegations of Authority policy.

Ongoing Management of the Model

As with the contestable grant making process, a structured purchase could be managed internally within ORC by the Environmental Delivery Team who in the absence of a centralised procurement team within ORC, the Environmental Implementation Team would need to design and administer the initial procurement process, including the development of the procurement documentation (including confirmation of the pre-eligibility criteria), RFP documentation and guidance documents, including scoring criteria. It is likely that this team would also need to oversee and respond to questions submitted and facilitate any sector briefings.

An advantage of this model is the administrative efficiency that can be gained through this funding model. Given the level of sophistication in this procurement approach and the financial value that each initiative is likely to attract, it would be recommended that only one funding round was held over the two-years of the funding. This would mean that this process would seek to allocate the total approved value of the funding in one funding round, rather than revising this annually. These administrative processes can further be reduced by including Right of Renewal clauses or ‘stop-go’ mechanisms within the contracting process which rewards high performing organisations and initiatives and allows for contracts and funding to be extended into the next LTP cycle (if the same level of funding were to be approved in out-years) without running additional procurement processes.²⁹

Regular ongoing contract monitoring would be managed by ORC and undertaken by staff with the relevant skills and experience to monitor performance against contracted outputs and outcomes.

Likely Timescale to Full Implementation

This model could be implemented in the short term, with funds allocated by the end of this calendar year. To achieve this, investment in time and resource is needed to ensure that robust and detailed procurement documentation is completed and that timelines, as required under the Government Procurement Rules, can be adhered to.

Ensuring effective communications and support, both internally within ORC and out to the environmental sector, as well as ensuring that ongoing resources are in place, will be vital to support the ongoing and effective management of contract delivery once funds are allocated.

Suitability of the Model Against ‘Large-Scale’ Funding Outcomes and Principles

Intergenerational Impact – this model will focus on developing a longer term, relational approach to service delivery, encouraging multi-entity partnerships with ORC and focusing delivery at a programme level rather than individual projects. There are opportunities to develop the criterion and focus purchasing decisions towards the outcomes sought rather than focusing on inputs and outputs as ORC will purposefully be taking a longer-term view of the procurement, focused on enhancing relationships and the delivery of outcomes, rather than the delivery of a discrete, one-off project within a set time frame.

Facilitation of collaboration across the system – traditional procurement processes are still competitive in nature as they seek to determine the best provider/s who are best placed to achieve the outcomes sought and value for money and therefore can discourage collaboration. There are greater opportunities for collaboration and innovation to be achieved through this process, depending on the procurement mechanism used, and whether the criteria requires collaboration to be evidenced in proposals.

Using a staged process, which allows for engagement with potential providers during the procurement process, can support the achievement of this outcome and longer-term contracting. Bespoke specifications can allow for funding and delivery that is targeted to the delivery and achievement of outcomes linked to collaboration and system wide capability.

Alignment to organisational strategy and strategic direction

– this model can enable alignment to strategic direction by determining priorities within the fund criterion, however there will still need to be rigidity to allow for equity and consistency in evaluation and review of proposals. This can reduce the level of innovation and experimentation that can come through a less rigid procurement framework and approach however, given that this procurement approach establishes a more collaborative and robust relationship between providers and ORC following the award of a contract, the relationship has greater longevity (when compared to a conditional grant) and provides greater opportunities for the council to continue to influence and monitor the achievement of outcomes against strategic priorities within the contract monitoring framework.

Analysis of the Model’s Strengths, Opportunities, Weaknesses and Challenges

In our review of the literature and from the feedback we received in the stakeholder interviews, we formed an assessment of the strengths, opportunities, weaknesses and risks of this model that ORC considered during the second Councillor Workshop. A summary of this analysis is outlined below. In addition, further operational and financial considerations for ORC are also outlined in this section.

²⁹ This may only be applicable and valid for some agreements and may not apply to all funding budgeted or all contracts/projects/initiatives.

7.4.2 Structured Purchasing Approach – Registration of Interest (ROI) and Request for Proposal (RFP)	
Strengths	<ul style="list-style-type: none">▪ Clearly defined procurement process and can direct funding to address higher priority issues or communities.▪ Allows ORC to establish and communicate clear outcomes, requirements and criteria for which purchasing decisions will be made. This can help identify a short list of suitable providers early in the process, and let others know whether they align with Council expectations. This can save everyone time and money.▪ It is likely to be less time and resource intensive than a competitive grant allocating process and there is only likely to be one funding round over the three years (allowing for three-year contracts to be put in place).▪ It can allow for greater innovation and collaboration during the procurement process, particularly if the council provides a market briefing at the start of the procurement process, allows Q&A's to be submitted as part of the process, or where a multi-stage process is run.
Opportunities	<ul style="list-style-type: none">▪ It can drive innovation and collaboration and gives communities a greater ability to propose and outline how they will address the Council's issues/priorities/requirements.▪ Can enable opportunities for Council and providers to work together on long term sustainable funding options.▪ Allows for more robust contracting processes that are available through conditional grant making processes.▪ Given the longer term and higher value, the council has the ability to allow for more robust planning, monitoring, and evaluation activities under the agreement.
Weaknesses	<ul style="list-style-type: none">▪ This model will require substantial upfront internal capacity and capability to get the process established. Planning and undertaking a comprehensive procurement process can take significant time and resources to execute effectively.▪ The criteria could be too narrow to attract a good range of respondents to the procurement.▪ Depending on the agreed criteria, there may be a limited number of community organisations with the capacity and capability to deliver the requirements, or those with capacity and capability may be confined to one geographic area of the region.
Risks	<ul style="list-style-type: none">▪ There may be limited capability of some providers to respond to a formal procurement process such as this which may impact on their willingness to respond. This may place further pressure on small numbers of staff or volunteers within these organisations.▪ This process may impact on existing relationships between community organisations, the ORC if those organisations feel they are being excluded from a process if they do not meet the criteria set out in either the ECO Fund or the 'large-scale' fund. They may not feel that their work is valued by the council.▪ Provider capability may be stronger in one catchment or geographical area, leading to the perception that only one part of ORC area is receiving funding or that funding is not distributed equitably.
Financial Implications	<ul style="list-style-type: none">▪ Risk investing in the providers that are best placed, or with the resources to write the best funding applications.▪ This can be mitigated by a pre-procurement screening process, but this may result in investment in only one or two catchment areas.▪ Investment may not be targeted at the highest priorities or the best environmental outcomes.▪ It will likely require an up-front commitment and commitment to invest the full value of approved funding in one procurement round (rather than by annual or one-off grants). There are both efficiencies and risks in this approach.▪ May place procurement requirements onto community organisations that they are not familiar with or adept at managing. This may require ORC to invest in time and resource to ensure organisations are supported through the process.▪ The length of investment needs to be long enough for there to be mutual benefit to both ORC and communities. If a multi-year term is not agreed, this will be an inefficient model operationally and financially for both council and community organisations.
Operational Implications	<ul style="list-style-type: none">▪ While the procurement process may be less intensive due to a reduced number of applications, the ongoing management and monitoring of contracts/programmes will be more resource intensive than the grant process, requiring a more specialised procurement skill set than may already be in place to effectively administer, manage, and monitor these agreements.▪ The strength of this model will be reliant on the procurement parameters and timings put in place to give ORC time to implement this model effectively, as well as giving respondents suitable time to submit a proposal in response to the Council requirements.

7.4.3 Funding via the Integrated Catchment Management Programme or by Catchment Action Plan

Introduction to the Model and Procurement Approach

Integrated Catchment Management (ICM) is a generic term used to articulate a system-based approach to resource management that looks at a catchment, rather than addressing individual environmental or biodiversity issues as individual parts (such as addressing pest management or water quality issues individually). This approach takes the view that environmental change will come from integrating social, economic, and environmental factors together to achieve landscape scale outcomes.

The ICM programme was approved as part of the ORC 2021-31 LTP, which enabled ORC to facilitate the development, implementation, and review of Integrated Catchment Action Plans in collaboration with iwi and the community. As part of this process, ORC has tentatively identified eight catchment communities that over time, will each have a Catchment Action Plan (CAP) in place which will support active management of natural resources across each catchment.

The ICM process is a community led approach, supported and facilitated by ORC, that focuses the community, iwi, and stakeholders towards action that has a positive environmental impact. ORC supports the planning, implementation, and monitoring of the actions outlined in the CAP, focusing on a coordinated response, ensuring that CAPs are collectively owned by iwi, the community, and ORC. The CAP process is currently being supported with funding from the Ministry for the Environment (MfE), enabling the employment of an ORC staff member until April 2026 to support catchment groups who are wanting to develop a catchment action plan on a smaller scale than is proposed as part of the ICM programme. The plans build on the work already being undertaken by catchment groups and is incorporated into the ORC ICM programme as it is rolled out across the region.

This model is still evolving, with one CAP currently in place and another two in the earlier stages of development. There is currently no set funding stream within ORC to financially support the delivery of initiatives identified in the Action Plans; however, Council did approve a one-off investment of \$100,000 in the 2024/25 FY to support the implementation of the Catlins Catchment Action Plan. The funding required to support ongoing implementation will be significantly higher than what has already been allocated, with the need for ongoing and sustainable funding raised as a concern by some Councillors as well as the community.

Under this model, it is proposed that large-scale funding would become the funding mechanism to fund the implementation of the CAPs. This model would see 'large-scale' environmental funding allocated outside of an openly contestable model, allowing ORC to direct funding to support the implementation of CAPs as they were completed.

This would constitute a closed competitive process or a direct source process under the Government Procurement Rules.³⁰ This would allow ORC to direct funding to support the implementation of CAPs as they were completed. Under a **closed competitive approach**, ORC could request proposals to a limited number of known organisations, which would be feasible when CAPs are confined to a specific region (and therefore a more limited pool of community organisations available to support implementation activities).

ORC may also be able to allocate funding via **direct source funding**, where ORC runs a closed process to request a tender, proposal or quote which is restricted on only one known supplier, in this case allocating funding directly to Catchment Action Groups. A direct source approach does not mean that funds are automatically allocated, these Groups would still need to submit

a proposal that was evaluated, assessed on its value, and that underwent due diligence before ORC determined that the group or entity had the capability to deliver on the required outcomes. This approach would however likely require the Catchment Action Groups to be legal entities which is unlikely to be the case currently.

Alternatively, Council may allocate these funds via a **conditional grant** to align with Implementation Plan delivery. This could be administered within the ECO Fund process as a separate fund tagged for '**CAP Implementation**' however the value needed for such a fund is not yet quantifiable and would likely constitute 'small-scale' investment if considered at a project-by-project scale.

If a group or organisation within the ICM programme governance structure is directly allocated funds to support the implementation of a CAP, further processes will need to be developed and agreed to determine where and how funds are directed to support CAP implementation. This is due to the fact that currently no CAP governance group is a legal entity, and it may still be unknown whether these groups have the capacity required to lead and fund the implementation of projects within the Plan. These governance groups will still likely need the skills and capability of existing community organisations to deliver projects on their behalf.

Governance of the Model

The ICM programme is currently governed at various levels within ORC, with the Council having overall ownership of the programme and serving as the approval function to endorse CAPs, Implementation Plans and Funding.

At an organisational level, the programme is governed by the ICM Working Group which includes elected members, senior staff, mana whenua and representatives from Otago Catchment Communities Inc. The role of the Working Group is to oversee and guide the development of the programme and its ongoing future functioning. They review proposals or identify issues and guide the development and review process of CAPs. They act as the filter to Council, reviewing proposals or escalating issues to Council for endorsement or resolution.

Community governance of the ICM programme is undertaken by Integrated Catchment Groups (ICGs) which include representatives from the CAP area including community representatives, mana whenua, local authority representatives, ORC staff, DOC staff, LINZ staff and other key stakeholders. This group oversees and development of the CAP and presents it to Council to endorsement. This group and their governance function ceases once the CAP has been developed.

Locally, following CAP endorsement by Council, the CAP Governance Group is established to oversee and drive implementation of the CAP. The various groups within all levels of the overall governance structure are supported by the ICM Team within the ORC's Environmental Implementation Team who assist with the facilitation and functioning of all groups involved in the ICM programme.

The governance model above relates to the governance of the ICM Programme and CAP development. We do not propose that any changes are made to this Council approved process. The governance of this model for the context of this report, specifically relates to the governance of funding decisions, not governance of the ICM programme itself.

We propose that this model would be governed in the same way other contracting agreements are within Council, depending on the value of the contract (as per the ORC Delegations of Authority policy). It would be the role of Council to ensure that procurement best practice and policies had been adhered to, and that value for money decisions have been made as a result of the processes undertaken.

³⁰ See Rule 14.

Fund Allocation Process

As highlighted in our introduction to this model, no consistent precedent has currently been set to allocate funds to support CAP implementation, with the funding allocated to the Catlin's CAP Governance Group still in the early stages of implementation. There are a range of procurement approaches available to Council to consider in the longer term – such as a direct funding (which is the case for the funding allocated to the Catlin's CAP), a conditional grant (which may work when only a few CAPs are in place) but this does process does not necessarily align with the intent of the 'large-scale' fund principles. The other option is to allocate funds via a closed competitive approach; however this is only feasible once more CAPs have been developed and endorsed for implementation (there is currently no one for the Catlin's CAP Governance Group to compete with).

For the purposes of our assessment under this model, we have assumed that 'large-scale' **funds would be allocated to CAP Governance Groups via a direct source approach** where funds would be allocated based on a detailed Implementation Plan that was supported by a budget that prioritised activities and outlined a staged implementation over the life of the CAP. This would outline the cost of the investment needed annually, the duration of each project or initiative under the Plan as well as identifying the outcomes that each initiative would achieve or contribute towards. A significant challenge in this approach is that funding would likely be required over a 10-year period to align with the life of the CAP. Over time, the number of CAP's will increase as will the demand for funds.

If CAP Governance Groups are not undertaking project delivery (and the name suggests that they will not), these groups will need to establish their own procurement structures to allocate the funds received from ORC further into the community to support delivery. This may inadvertently create the evolution of multiple pseudo- ECO Fund processes that become replicated across each Catchment Area or Group. Consideration also needs to be given to the ongoing role of existing organisations and legal entities that already support the CAP process on a smaller scale, such as Otago Catchment Communities Inc.

In this scenario (and which is currently the case for the Catlin's), it may be better for Council to hold the funding and allocate it to implementation activities directly, and/or to the most appropriate group to deliver the project or initiative. Caution is also needed here to ensure that Council is also not duplicating the ECO Fund process by replicating processes and structures to support CAP Implementation. This will create significant inefficiencies and pressure on internal resources with a further risk that the intent of 'large-scale' funding will be lost. Attention could become focused on the delivery of many small or one-off projects (even if they are seen to collectively contribute to a landscape scale impact over the long term).

Under this model, and a direct investment approach, Council would need to determine a set investment value for an agreed period of time to allow for CAP Implementation. This would align the priorities, with an agreed budget between the CAP Governance Group and Council. If the CAP Governance Group was not a legal entity, Council will need to work with stakeholders in the Catchment Area to identify and agree a suitable organisation who is able to hold and manage the funds on behalf of the Council and CAP Governance Group.

As the development of CAPs evolves and expands, Council will have less 'large-scale' funds to go around to support the implementation of each CAP. Once the current two-year allocation of funding ends (under the current LTP), the number of completed CAP's will have increased across the region.

At this point, Council will need to consider whether investment to support CAP implementation is equally split across each catchment group or whether investment is made through an objective measure that compares priorities against each

other. This approach will also still need to consider those catchments/communities that still will not have a CAP in place by 30 June 2027.

Ongoing Management of the Model

Under this model, management of the ICM Programme and CAP process would remain unchanged, with this approach only applying to the process of the ongoing management of the allocation of the funding to support implementation of the CAPs.

ICM Programme staff would need to continue to work alongside CAP Governance Groups to source and secure additional and ongoing revenue to support the Implementation Plan past the life of the current approved ORC investment. The Council will need to consider whether this team is currently resourced to the right level to take on this additional function and role which will include the need to determine whether funding allocated is sufficient to fully fund implementation and if not, how ORC will support catchment groups to source additional funding.

Likely Timescale to Full Implementation

Currently one CAP has been completed and endorsed by Council, with a further CAP well underway and a third in the early stages of development. Through the LTP process, Council agreed to implement a staged approach to the implementation of the CAPs, with a schedule and timeline still to be approved by Council.

Implementation of this model in its entirety is likely to take five years to ensure all CAPs are completed and with endorsed Implementation Plans in place. This approach will mean that many communities and Catchment Action Groups will have to wait a long time before they can access the benefits of 'large-scale' environmental funding. This approach is not likely to be supported by ratepayers and environmental groups within those communities who have not yet begun the CAP process or who are unlikely to being this process in the short to medium term.

Suitability of the Model Against 'Large-Scale' Funding Outcomes and Principles

Intergenerational Impact – introducing a funding mechanism that supports the ICM process, and the implementation of community-led CAPs is highly relevant to achieving this outcome, as the CAP process takes a landscape scale approach, involves multiple stakeholders, and takes a long-term approach to environmental management. Funding against a CAP that is supported by evidence and science, that is endorsed by mana whenua, the community, and ORC and that aligns with the community's environmental aspirations to protect the area for future generations, is highly relevant to the alignment of investment to achieving intergenerational impact.

Facilitation of collaboration across the system – the CAP process is inherently based on the premise of collaboration and a joined-up approach to planning by ICM or catchment area, therefore implementing a funding mechanism that aligns with the CAP process would inherently meet this outcome. The prioritised projects and initiatives have already been put through a rigid planning, prioritisation, and sign-off process by the time they appear in CAP, and they have been endorsed by key stakeholders and partners. The challenge in aligning the delivery to the planning element of this work, will be the allocation framework that is used to distribute the funds, and whether this can be achieved without putting highly competitive grant processes in place that could erode the collaborative work already undertaken.

Alignment to organisational strategy and strategic direction – in theory, funding via the CAP mechanism, should create a strong alignment to strategic direction, particularly as the priorities outlined in the plans are aligned to data and evidence. Prioritising all elements within the implementation plans will be the challenge for catchment groups to determine where investment needs to be put first, especially if the funding is not guaranteed for the long term. The way in which Council actually allocates funds

towards the implementation of the Plan can impact the success of this outcome, as there is the risk that low-hanging fruit may be implemented first (to prove value), while more complex pieces of work (that could achieve greater outcomes), may be avoided if their overall value is difficult to prove in the short term. If ORC continues to use the ICM process to guide work in this area, the model to allocate funding in line with the approach will achieve strategic alignment, as long as the intent of 'large scale' funding is maintained.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

In our review of the literature and from the feedback we received in the stakeholder interviews, we formed an assessment of the strengths, opportunities, weaknesses and risks of this model that ORC considered during the second Councillor Workshop. A summary of this analysis is outlined below. In addition, further operational and financial considerations for ORC are also outlined in this section.



7.4.3 Funding via the Integrated Catchment Management Programme or by Catchment Action Plan	
Strengths	<ul style="list-style-type: none">▪ Provides a systematic and structured approach to funding that is grounded in the key principles and outcomes Council seeks to achieve.▪ Allows for a stronger alignment of organisational strategy to community strategy and implementation and community action.▪ Can allow for a phased implementation of the funding approach, that can align to CAP development.▪ A precedent for the process is already set with the CAP process in place. This will continue to evolve and develop in line with best practice.▪ Supports the implementation of a data driven approach which is already supported by ORC and other key partners and is endorsed by mana whenua.▪ The implementation plans are endorsed and supported by ORC, mana whenua and the community and are therefore 'implementation ready' and will require little planning and lead in time before delivery can begin.▪ There is an internal structure already in place to support the coming together of catchment groups and supporting plan development. Allocation of funding through this model could be achieved quickly and cost effectively (but would still require additional resource).▪ Supports cross sector and cross partner/stakeholder collaboration.
Opportunities	<ul style="list-style-type: none">▪ Provides an incentive for communities to come together and commit to the planning process if they know that they will be financially supported by ORC to implement the plan.▪ It allows for greater opportunities to plan and evaluate the projects/initiatives delivered and inform future decision making through data and evidence gained through the development of intervention logic (conducted during the development of the CAP).▪ Provides a framework and funding to directly support communities to implement the CAPs that currently does not exist (linked to incentivisation).▪ Can remove some of the confusion around 'large scale' funding and the decisions around its purpose and process of allocation.▪ Can enhance on the ground collaboration and coordination by actively bringing together mana whenua, community stakeholders and ORC.▪ Can cement ORCs leadership role in the sector by demonstrating an ongoing commitment to support both CAP and implementation in communities.
Weaknesses	<ul style="list-style-type: none">▪ Investment decisions will be driven to those communities 'ready' and 'willing' to develop a CAP with catchments with high environmental needs or priorities missing out or being deprioritised if there is not an achieve CAP process in place.▪ Currently there is not the appetite or resourcing to expedite the development of CAPs across all catchment areas simultaneously. This means that the funding may incentivise communities to develop a plan, but ORC will not be able to effectively meet demand for this within the current ICM approach.▪ The value of the funding available and the level of investment that can be made will dilute over time. For example, Catlins as the only approved plan, could seek the full amount of the funding available in the 'large-scale' fund, but competition for the available funding would increase significantly with more CAPs being implemented.▪ In some catchment areas, suitable governance and management structures may not be in place to hold/spend/allocate ORC funds to support CAP implementation. This is especially true where delivery against the plan needs to be completed by a third party (such as a contractor). These community groups may not have the capacity and capability to manage ratepaying funding in this manner.▪ Capable and reliable community organisations may not have the opportunity to deliver projects or initiatives of 'large-scale' if funds are only able to be allocated to community organisations working in areas that have an approved CAP in place. This may lead to lost opportunities as a response to 'waiting'.
Risks	<ul style="list-style-type: none">▪ ORC's ability to adhere to procurement best practice, accountability and transparency requirements may be limited if funding is not able to be allocated to an experienced community organisation or legal entity to oversee CAP implementation.▪ If entities leading the implementation process are required to allocate grants and small-scale funding to other groups within the community to deliver against the plan, this could create significant inefficiencies by recreating multiple allocation and accountability structures at catchment levels.▪ If CAP implementation is not effectively coordinated and managed to achieve landscape scale impact, the intent and purpose of 'large-scale' funding could be lost, giving rise to ad hoc delivery of a variety of projects that are uncoordinated and unconnected.▪ Community enthusiasm and engagement (and access to suitable volunteers to drive implementation) may wane over time. It is important to note that this could occur regardless.▪ The impact of the investment and outcomes that can be achieved in each community may wane over time as more CAPs are developed and funding is diluted.▪ Work needs to be done to support communities to identify and secure sustainable funding streams to support ongoing delivery (if ORC does not intend on being the sole, long-term funding partner to the CAP implementation process).▪ Groups and communities may struggle to leverage additional investment or resources if they are a newly established group (established in response to there being no suitable legal entity for ORC to invest in) and do not have a strong track record of delivery).
Financial Implications	<ul style="list-style-type: none">▪ Sustainability of the funding – the impact and value will become diluted over time as more CAPs develop and the implementation requirements will be ongoing.▪ Potentially sets the precedent and expectations within communities that ORC is the sole funder of CAP implementation.▪ Risk that some communities will not have the opportunity to access funding, regardless of need, if there is no CAP in progress or in place.▪ May require significant internal resourcing and support to establish and support community 'readiness' for CAP implementation. This is currently being managed internally within existing resources to support the Catlins, but it is not likely sustainable once the process is in varying stages of development across the region.▪ Should MfE funding to support the CAP process cease, ORC will need to source this funding from other internal budgets, or source from outside the organisation.▪ The internal capability and capacity required to shift from CAP development to funding implementation may be different to what is in place.▪ Community readiness may drive funding prioritisation and allocation decisions that may create inequities across the region. That is, community readiness may direct funding decisions rather than environmental need.
Operational Implications	<ul style="list-style-type: none">▪ An increase in internal resourcing, capacity (and potentially different capability) will likely be required as the need to support and invest in implementation activities ramps up.▪ Resources may become spread too thin on the ground over time.▪ Duplication and inefficiencies may occur if projects and initiatives are developed and invested in on a CAP-by-CAP basis rather than looking at opportunities for a region wide approach to meeting outcomes or addressing issues.

7.4.4 Devolving ‘Large-Scale’ Funding to a Third Party to Administer & Grow

Introduction to the Model and Procurement Approach

The Oxford Dictionary defines devolution as the transfer or delegation of power to a lower level, especially by central government to local or regional administration. In this case, we refer to devolution as the process of ORC relinquishing some of its power or authority to a smaller governing body within the region in relation to ‘large-scale’ environmental funding.

Under this model, ORC could devolve roles and responsibilities for ‘large-scale’ funding in several ways, such as:

Allocating the budgeted large-scale funding to an entity inside of the ORC legislative system but with arm’s length control – such as an existing council-controlled entity.³¹ This entity would then have the role and responsibility of administering the large-scale funding on behalf of ORC.³²

OR

Allocating the budgeted large-scale funding to an entity outside of the council legislative and controlled system – but one that has experience and expertise in grant making or funding allocation processes. This entity would then have the role and responsibility of administering the large-scale funding on behalf of ORC. This could be a community funder or charitable entity.³³

OR

Funding the administration costs of a separate third-party entity, whose primary purpose is to leverage additional funds or raise funds on behalf of ORC to raise the profile of the need and increase the overall pool of funds available to invest in large-scale environmental initiatives. Under this option, the function and responsibility for managing and administering the existing ORC funds could either be managed internally by ORC or contracted as a requirement of this entity (in addition to fund leveraging or raising activities). This could be a charitable entity or philanthropic fundraising organisation.

Section 17A(5) of the LGA (2002), allows for the devolution of responsibilities from local authorities to third parties, so long as the entity that is responsible for governance (in this case ORC), ensures that there is a contract or other binding agreement in place to manage these arrangements. By law, an arrangement that would see ORC contract out their roles and responsibilities to allocate funding and/or leverage additional funding on behalf, would be required to clearly specify the following:

- The required service levels; and
- How performance measures and targets were to be used to assess compliance within required service levels; and
- How performance is to be assessed and reported; and
- How the costs of delivery are to be met; and
- How risks are to be managed; and
- What penalties for non-performance may be applied; and
- How accountability is to be enforced.

The LGA (2002), also goes on to outline that these requirements do not apply where ORC is satisfied that:

- The entity responsible for delivery under the agreement is a community group or not-for-profit organisation, and if
- The arrangement does not involve significant cost or risk to the local authority.

Under this model, once a third-party organisation had been identified (**via a ROI or closed tender process**) and contracted by ORC (**under a Letter of Expectation or similar service agreement**) to administer ‘large-scale’ funding, they would be able to allocate the funds through a process that the contracted party considered suitable.

This process would need to align with the Government Procurement Guidelines as the funds they received were obtained from ratepayers. It would be deemed most likely, that a third-party would implement a **conditional grant** to allocate funding on behalf of ORC. If the third-party was able to leverage additional investment to support ORC’s investment, the suitable contracting mechanism to govern and manage this arrangement would need to be determined and agreed by all parties.

Governance of the Model

To implement this model, ORC would need to identify, negotiate with, and confirm a suitable partner to whom it could devolve this funding to under a suitable contract or legal agreement. As well as the requirements outlined in the legislation, this agreement would need to clearly outline the expectations of ORC regarding the parameters and use of the funding, as well as the strategic intent and purpose of the ‘large-scale fund’.

If a requirement was for the contracted entity to raise additional funds to leverage ORC investment, clear KPIs would need to be agreed, and it is further recommended that ORC outlines some parameters that would constitute appropriate fundraising activities, to ensure these are aligned to the values and expectations that ORC wishes to uphold.

Governance of the ‘large-scale funding’ would come under the remit of the contracted partner/entity, with ORC becoming a step removed from the process and having no direct governance oversight of the allocation of the ‘large-scale’ funds. The governance role that Council would assume under this model, would be to ensure that ORC was effectively managing the contracting arrangement between the council and the third party, and not to govern how funds are allocated.³⁴

The exception to this would be where Port Otago was the contracted entity, as they would be required to include the parameters and processes to allocate the large-scale funding as part of their Statement of Intent (SOI) and Annual Report which ORC is required to approve as the shareholder.

Fund Allocation Process

Following the process to identify and contract a suitable third-party entity, it would be the role of the contracted entity to establish the systems and processes to administer and allocate ‘large-scale’ funding on behalf of ORC. It is likely that through the negotiation phase, ORC would request stage-gates or check points to ensure that the fund parameters were developing in line with Council approved process and expectations.

As the entity is tasked with allocating ratepayer funds on behalf of Council, the agreed process to allocate funding would need to align with Government Procurement Rules and best practice guidelines to protect the transparency and validity of the process. This may include having ORC representation on an Evaluation Panel or Fund Allocation Committee.

31 Which in this case would need to be Port Otago as the only CCO owned by ORC.
32 Note that this option has not yet been discussed or socialised with Port Otago to determine the suitability of this option.
33 For example, Otago Community Trust.
34 Unless Council representation was negotiated as part of the agreement.

In the short term, it would be considered most likely that a third-party would implement a conditional grant to allocate funding on behalf of ORC. If the third-party was able to leverage additional investment to support ORC investment, the suitable contracting mechanism to govern and manage this arrangement would need to be determined and agreed by all parties, and the allocation mechanism may change over time.

Following the allocation of funds, the contracted party would report back to ORC against their contracted outputs and outcomes while the entity would continue to monitor the performance of the funds allocated to community organisations to achieve 'large-scale' environmental impacts.

Ongoing Management of the Model

This model would effectively remove the day-to-day management functions that are required in the establishment, administration and monitoring of the 'large-scale' fund. These functions would now reside with the contracted third party and it would be their role (under the service agreement) to plan and execute the application process, review and evaluate applications or proposals (depending on the procurement model used by the third party), allocate funding, and manage delivery and performance against these funding agreements or contracts.

During the negotiation phase of the agreement with the third party, it would be expected that ORC would seek to have an ongoing role in the funding allocation decisions made by the third party to maintain suitable transparency for ratepayer funding. This ongoing role would need to be negotiated from the outset, and the ability of the ORC representative to influence grant/funding decisions may be limited.

Through contract monitoring processes, ORC would then receive regular accountability documentation from the contracted entity that would detail how they were meeting their required KPIs against the agreement. This would relate to either the allocation of 'large-scale' funding and/or the value of additional funds raised or leveraged, depending on the scope of the agreement and the agreed role of the provider.

Although the day-to-day management is transferred to another entity, ORC has an obligation to its ratepayers to effectively monitor the agreement it has in place with the third-party entity. This needs to be undertaken by someone within the organisation that has the capacity and capability to effectively manage the agreement, ensuring that the council's interests are met and that outcomes and value for money are achieved for ratepayers. This will attract an internal cost to the council.

In addition to this internal cost, the third party would seek a management fee to cover the costs of administering the fund on behalf of the council. The fee sought will vary depending on the systems already in place by the entity. For example, if ORC contracted the Otago Community Trust to administer and allocate funds on their behalf, they are likely to already have substantial skills, experience and systems in place to implement this (and a precedent of doing this with other local authorities), and the fee may be smaller than an if the contracted party was Port Otago, as they are unlikely to have grant or funding allocation systems in place to easily administer this funding on behalf of council.³⁵

The key point to note in this model is that the decisions around the criteria for the use of the large-scale funding, the procurement process, the allocation decisions and the monitoring of the programmes or projects funded, becomes a step removed from ORC and therefore at arm's length control from Council. This carries an element of risk for council with decisions around the use of ratepayer funds given the proposed level of investment (currently agreed at \$2 million per annum).

Likely Timescale to Full Implementation

This model could be implemented in the short-term depending on the availability of suitable third-party entities for Council to partner with.

The ability of a third-party entity to leverage additional investment to support the funds provided by ORC and to grow the overall pot of funding available for allocation, is likely to take longer to achieve.

Suitability of the Model Against 'Large-Scale' Funding Outcomes and Principles

Intergenerational Impact – implementing a funding model that is at arm's length from ORC processes will result in Council also becoming at arm's length from the decisions around where investment is directed and to what priorities and communities it is directed to. The ability of ORC to direct this funding towards contributing to intergenerational impact will be dependent on how the entity prioritises investment, the focus it places on purchasing outcomes on behalf of ORC (as opposed to purchasing inputs and outputs). It is not known how effective the entity is at monitoring and reporting on the use of funding and assessing how well those working on the ground are contributing to intergenerational impact through what, and how, they deliver environmental initiatives.

Facilitation of collaboration across the system – under this model, the ability of the fund to continue to foster collaboration across the system will be dependent on the way in which the entity develops and implements the funding criteria and parameters. There are both risks and opportunities to the model achieving this outcome, both dependent on the scale of influence and control the entity has independently of ORC, and the ongoing influence ORC has in terms of influencing focus areas of the funding.

Alignment to organisational strategy and strategic direction – under this model, maintaining a strong alignment to ORC strategy and strategic direction will be challenging as investment decisions will become a step removed from the council decision making process. There are opportunities for ORC to retain this alignment, if staff can retain a role in the prioritisation and investment decisions being made by the third party on behalf of Council. There is a risk that this alignment can reduce over time and maintaining it will require a strong and enduring relationship with the contracted party (built on great communication, and sound contract management skills) to ensure funds are allocated in line with council priorities and strategy.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

In our review of the literature and from the feedback we received in the stakeholder interviews, we formed an assessment of the strengths, opportunities, weaknesses and risks of this model that ORC considered during the second Councillor Workshop. A summary of this analysis is outlined below. In addition, further operational and financial considerations for ORC are also outlined in this section.

³⁵ Note we do not imply here that Port Otago would not have sufficient financial management or accountability systems in place, but more specifically, they are unlikely to have systems in place to manage the collection and review of online grant proposals, for example.

7.4.4 Devolving 'Large-Scale' Funding to a Third Party to Administer & Grow	
Strengths	<ul style="list-style-type: none">▪ It reduces the internal administration and capacity requirements on ORC staff to administer and manage the funding/procurement process.▪ It can allow for more efficient and effective procurement outcomes if contracted entities acting on behalf of ORC have the skills and expertise currently not held within Council.▪ Can keep the Council at arm's length from the procurement process and delivery, which can reduce the perception of conflicts of interest, make the fund more attractive to co-investment opportunities, and may be viewed more favourably by the community and stakeholders.▪ The contracted entity may be more cost effective in providing skills and expertise needed depending on overhead structures and costs.
Opportunities	<ul style="list-style-type: none">▪ May open doors to additional leveraging and co-investment, or philanthropic investment opportunities if the fund is operated outside of the ORC structure and political process.▪ Could allow for funds to be pooled across different organisations that can then be allocated and administered independently so not to favour one organisation or funder over another, contributing to more equitable funding decisions.▪ Provides opportunities for the fund holder to benefit from charitable tax exemptions which could positively affect the overall value of the funds available to grant/allocate.
Weaknesses	<ul style="list-style-type: none">▪ A portion of the ORC investment will need to be retained by the entity as an administration or overhead fee, or this fee will need to be covered from additional ORC funds.▪ Investment decisions are made by people removed from day-to-day delivery who may hold important contextual information and existing relationships.▪ It is not currently known if there are any suitable entities in the region who have the desire, capacity or capability to partner with ORC to implement this model in the short term.▪ Port Otago, as an existing CCTO, is not set up to undertake charitable activities, and this fund does not align with their priorities outlined in their Statement of Intent. Therefore, ORC may need to seek an arrangement with an entity that is completely outside of the local government legislative and regulatory framework.▪ The model will still require significant ORC oversight and management to ensure delivery against KPIs and contract is being achieved.▪ May take some time to stand up and be fully operational, and the ability of this arrangement to leverage additional funding will likely take significant time to achieve.
Risks	<ul style="list-style-type: none">▪ Transparency of the use of ratepayer funds is reduced by devolution to an entity outside of ORC.▪ The entity contracted could be too far removed from the day-to-day work happening in the region, particularly if their core business is not supporting environmental initiatives or investment.▪ The ORC may not be able to find a suitable entity to contract to administer funding on their behalf, or those with suitable capacity and capability may not have a regional mandate across the region (and therefore not know the communities or understand their issues).▪ There is a reputational risk to ORC if the contracted entity does not effectively deliver what was intended, or there is a misalignment in values between the entities, or communities do not feel implementation has been fair, equitable or transparent.
Financial Implications	<ul style="list-style-type: none">▪ The funding available for investment will be diluted (circa 10% p/a) to cover the administration costs met by the contracted entity.▪ The ability (and/or appetite) of an outside entity to raise additional funds/investment on behalf of ORC may be limited.▪ The Council may not achieve value for money if the entity is not capable of effective delivery.▪ May create duplication or gaps in the transfer of information, data, and grant information between organisations.▪ Duplicate funding allocation decisions may be made without insight into who each entity is allocating funding to (noting that ORC has funding streams outside of the large-scale fund).▪ To be cost efficient, all grant making and funding activities undertaken by ORC could be transferred to an outside entity, but this could attract larger overhead costs and increased probity concerns relating to the use of ratepayer funds.
Operational Implications	<ul style="list-style-type: none">▪ The model will take time to set up and establish, especially if there is no entity willing and able to take this role on. ORC will need to establish trusting relationships prior to entering a formal contracting arrangement.▪ It is unlikely that one single entity exists that could take on this role and that also has full regional reach and coverage that aligns with ORC boundaries. This may mean multiple agreements could be required to achieve coverage, which would create a range of risks and financial considerations.▪ Administering this arrangement would still require a significant level of internal capacity and capability to ensure the fund was effectively being administered and aligned to ORC strategy and priorities.▪ The ability of the contracted entity to make sound and effective funding decisions may be at risk if the scope or scale of this fund is outside of their core business, or area of expertise.



7.4.5 Joint Venture – Collaborative or Co-Funded Arrangement

Introduction to the Model and Procurement Approach

Sections 12 and 14³⁶ of the LGA (2002), outline that a *regional council must exercise its powers wholly or principally for the benefit of its district for all or for significantly part of its region, and not for the benefit of a single district*. These sections, however, do not preclude territorial authorities or regional councils from engaging in a joint undertaking, joint activity, or a co-operative activity as would be the case in this proposed model.

Equally, these sections in the legislation do not prevent local authorities from making donations (money, resources, or otherwise) to another local authority, or to another person or organisation outside of the district, region, or outside New Zealand Aotearoa if the authority considers that there are reasonable grounds to do so that create benefit to its district, region, or the communities within. Section 14 (1) further states that a local authority should collaborate and cooperate with other local authorities and bodies, as it considers appropriate, to promote or achieve its priorities and desired outcomes, and make efficient use of resources.

Essentially, the legislation allows for regional councils to undertake collaborative and joint activities in partnership with their local authorities, and other reasonable parties, where there is deemed a benefit to their communities in doing so. Collaborative arrangements look very different depending on the partners involved, the outcome, and purpose of the collaboration, and the regulatory environment. Collaborative practices fall on a spectrum from soft or informal arrangements to hard or more

formal arrangements. A joint venture is at the hardest end of the spectrum and will therefore likely apply in a fewer number of settings.³⁷

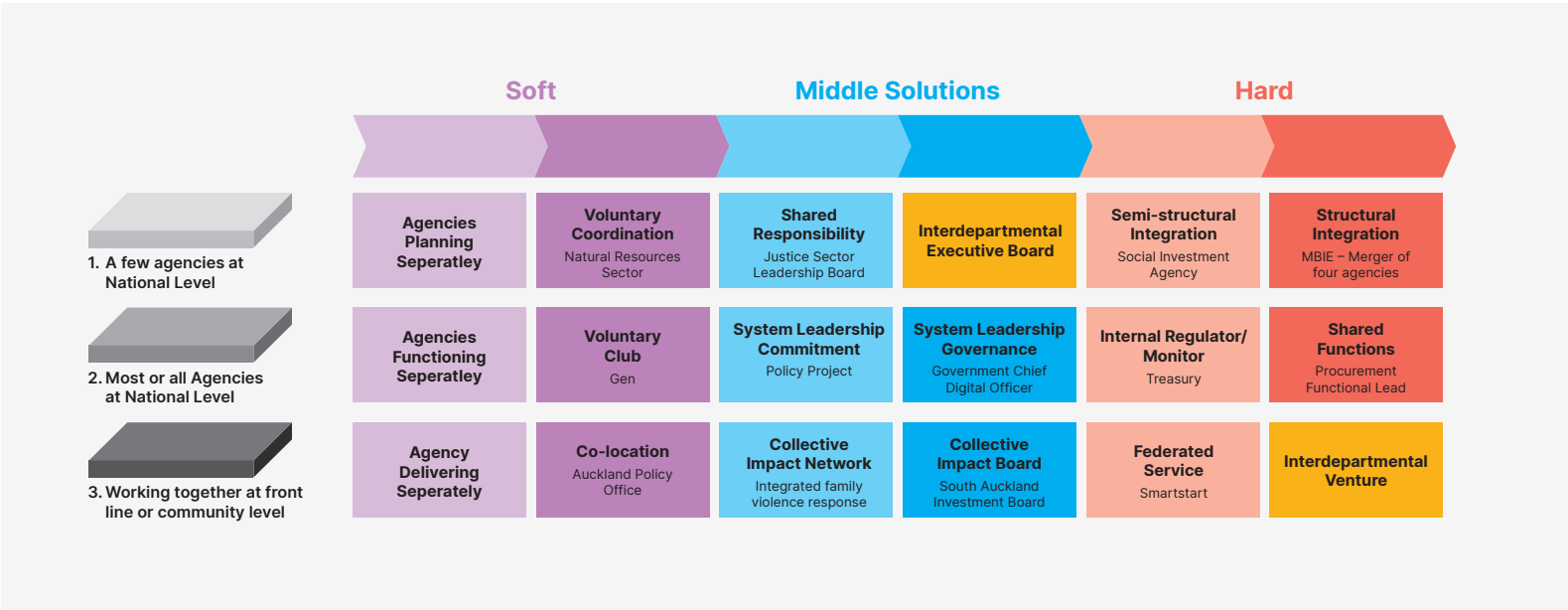
In 2017, the Public Service Commission released a Toolkit for Shared Problems and outlined the continuum of aligning problem contexts with collaborative solutions. While this is focused on central government responses, there is relevance in understanding this continuum from a local government perspective, and the implications for ORC of a joint or collaborative arrangement in the allocation of large-scale funding.

This continuum is outlined in Figure 10 below, noting the most relevant activities on the continuum in this context relate to those in the bottom line of the continuum (where entities are working together at the front line or community levels).

Over recent years, reviews of collaborative models have been investigated with the OAG undertaking a review of local authorities working together in May 2004. While now reasonably outdated, this review did investigate 12 different joint arrangements that were in place across the country, which ranged from staff sharing arrangements, joint procurement, combined planning, and cooperative service delivery models.

The opportunity for ORC to enter a collaborative or joint model to allocate large-scale environmental funding does exist, with a range of options being available for ORC to consider. These models could contribute to enhancing best practice, achieving economies of scale, improving coordination, and collaborative funding of services/projects that contribute to achieving better community and environmental outcomes.

Figure 10: Toolkit for Shared Problems Continuum



36 Section 12(6), subsections (4) and (5), and Section 14(1) (e)
37 Scott and Gill, Public Service Commission & Public Service Act 2020.

It could potentially be argued that if ORC focuses on the development and strengthening of relationships with key stakeholders and the wider funding sector, then a variation of this collaborative model will organically develop over the longer term. Our assessment under this model is taken from the standpoint that a deliberate and intentional joint venture should be the intended outcome, noting that mutually beneficial, high trust and strong strategic relationships will be a precondition for any informal or formal joint venture or collaboration.

Given the size of the available funding, the maturity of the existing relationships and partnerships across the region³⁸, and the current models of investment being used by ORC and other local authorities, we would envisage a collaborative, joint, or co-funded model to constitute one of the following:

A collaborative arrangement between ORC and one or more of the other local authorities in the region.

OR

A collaborative arrangement between ORC and another philanthropic or community partner that either has a regional or national remit to support environmental initiatives. This could include a collaborative arrangement with a community, or philanthropic funder (such as Otago Community Trust), or a central government agency or department (such as DOC).

OR

A collaborative/joint arrangement between ORC and an iwi-based entity such as Aukaha or direct with Ngāi Tahu.

From a procurement perspective, **a joint venture or collaborative/co-funded arrangement could constitute a conditional grant or a relational purchase** under the Government Procurement Guidelines, depending on the scope and scale of the partnership/collaboration.

Governance and Management of the Model

Collaborative arrangements take time to develop, both at a governance and management level, and it’s acknowledged that no one model is the ‘right’ model to implement. The right model is one that meets the needs and aspirations of the partners involved and can work within the financial and regulatory constraints faced by the partners.

At a governance level, there are a range of frameworks and options that can be put in place to govern a collaborative arrangement, however, regardless of a formal mechanism, there will need to be commitment, buy-in, and regular engagement at a CEO and Board/Councillor level to ensure effective leadership.

The scope of the collaboration (taking a continuum approach) for ORC to consider managing and ‘large-scale’ funding could include:

A Formal Partnership or Arrangement (hard end)

This would see ORC enter a formal arrangement with at least one other partner/organisation to outline a framework for the governance and management of pooled or joined funding for investment into large-scale environmental projects of initiatives (with a scope that could also expand over time).

This formal arrangement could include a Service Level Agreement or Shared Service Arrangement between one or more partners and would clearly outline the roles and responsibilities of each partner as well as the accountability mechanisms to ensure transparent and effective use of funds. The parameters of this arrangement would change depending on the nature and purpose of the joint venture, with more stringent requirements

in place if shared funding arrangements were used, compared with an agreement or intent to collaborate to achieve better grant making and funding allocation decisions.

A Memorandum of Understanding (middle solution)

The establishment of a Memorandum of Understanding (MoU) could include a spectrum of governance and management arrangements which could include the existence of a formal steering group or advisory group that exists at a governance and senior leadership level within the partners. This structure would help ensure that duplication is reduced, gaps are identified, and efficiencies are identified in funding decisions. Care would need to be taken with this type of arrangement to ensure that privacy and sensitive financial information are shared appropriately.

Regardless of the formality of the joint venture, or how the partnership develops to shift from softer to harder along the continuum, ORC needs to be cognisant of the following governance (and management) considerations:

- How internal resources and costs would be allocated and managed to support the establishment and operations of the joint venture, and agreement on the internal staff and administrative costs that would be met by ORC and other parties.
- How ORC would support external costs that may be incurred through a joint venture (such as branding and marketing costs to implement a co-funding initiative).
- The decision making and accountability mechanisms that would be used to account for multi-agency investment, particularly if the investment is not equal across partners, and/or where investment is balanced between cash and in-kind investment.
- How the joint arrangements would be monitored and evaluated in relation to both the strength of the relationship or collaboration as well as the success of the co-investment/co-funding.

At a management level, there will need to be a clear understanding of the aspirations and outcomes that the relationship sets out to achieve, and a clear line of sight from governance to the day-to-day management of the relationship and arrangement. Collaborative partnerships rarely succeed where there is an absence of either consistent and aligned goals, values, and approach at either a management or governance level. The way that the arrangement would be managed within ORC will be dependent on the nature and extent of a collaborative or co-funded arrangement, but clear roles and responsibilities will need to be outlined and agreed, particularly if the arrangement requires the pooling or coming together of funds, where one agency may be holding and administering funds on behalf of another.

Fund Allocation Process

This process assumes that the joint venture involves co-investment and goes beyond an MoU or commitment to work together. Following the full establishment of the Joint Venture, funds would be allocated to the collective governance group under a Shared Service Arrangement or Service Level Agreement.

The governance group of the Joint Venture, of which ORC would play a key strategic role, would work together to establish and agree suitable systems and processes for allocating the funds. Under this model, one entity may need to take the ‘lead’ role, offering up the use of their existing systems and structures to support the administration, allocation and monitoring of the funds. It would be inefficient and ineffective to create new and independent systems and structures under this approach with

38 We are specifically referring to the lack of an existing arrangement with a non-government partner or potential co-funder in this example.

suitable mechanisms available to the partners to confirm these types of arrangements, including any suitable administration or overhead fee that might be incurred by the 'lead' partner.

Depending on the size and scale of the investment available, and the number of partners to the joint venture, it is likely that the funding arrangements would evolve over time as the joint venture becomes more sophisticated. It may start as a conditional grant allocation process and evolve to a more structured procurement or purchase arrangement over time (and as investment grows). The impact of the investment initially may be focused towards reducing duplication and increasing efficiencies, which may be achieved through a conditional grant making process that is inherently collaborative in nature.

Funding allocation decisions would be made by an Evaluation Panel which would include representatives from the partners of the Joint Venture, with the outcomes of the process reported back to the ORC by the Governance Group representative.

The Joint Venture may require that ongoing fund administration and management processes are undertaken via a collective management group that includes representatives from the partner organisations (such as a Steering Group). This group could collectively monitor the delivery of contracted outputs and KPIs and report this back to the Joint Venture Governance Group and to ORC.

If over time, the funds allocated by each partner to the collaboration may change, and while it is assumed that ORC would take the lead role in this model, this may change over time if the level of investment made by ORC was to change. This could have an impact on the level of influence ORC had through the funding and allocation processes and in allocation decisions. This could also result in funding allocation processes and decisions moving away from the priorities identified by ORC and closer towards the priorities of other funders (should the value of their funding increase in line with or exceeding that of ORC).

Likely Timescale to Full Implementation

Developing high trust and collaborative models can take significant time to develop and embed and there are several factors that need to come into alignment simultaneously to ensure an arrangement such as this is achievable. This includes alignment of organisational priorities and expectations, budgeting and funding cycles and the need for collective leadership at all levels to make these types of initiatives successful. They require a commitment to look beyond the achievement of operational efficiencies and towards the long-term vision of the collaboration.

Considering the current strengths of the existing partnerships and relationships across the region (as identified during the consultation process), we would anticipate this model to be a longer-term aspiration for Council, with an expected timeframe to full implementation to be at around three to five years. This timeline could change however if the right conditions for collaboration are able to be met sooner.

Suitability of the Model Against 'Large-Scale' Funding Outcomes and Principles

Intergenerational Impact – this model can encourage a long-term view of investment that is based on the aspirations of multiple partners, particularly when mana whenua are key partners in a joint venture or collaborative model. The level of intergenerational impact a joint venture can achieve will, however, be dependent on all partners being able to align their priorities and approaches and collectively agree to continue to support the collaboration for longer than one funding or LTP budget cycle. The ability to achieve intergenerational impact will likely correlate with the ability of the partners to collectively align their priorities and investment.

Facilitation of collaboration across the system – a truly collaborative model by nature allows for more relational approaches to problem solving and service delivery that usually allow for innovation. It is important to distinguish between the collaboration at a funder or regulator level, and collaboration at a community or provider level. For this model to support the achievement of increased collaboration across the system, ORC will need to lead by example, with clear roles and responsibilities in place (and working effectively), before enabling collaboration at a community level. Instilling a culture of collaboration at all levels within the system is ideal in the long term.

Alignment to organisational strategy and strategic direction

– this model can enable alignment to strategic direction if priorities, and criterion for funding are agreed by all partners in the joint venture and are clearly communicated. This could prove challenging where multiple partners may have competing, or misaligned priorities, or where investment or decision-making rights are not equitable across all partners of the collaboration, particularly if ORC did not remain the 'dominant' partner over time. All partners to the Joint Venture will need to be in alignment to ensure investment decisions are aligned to the collective strategy and priorities.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

In our review of the literature and from the feedback we received in the stakeholder interviews, we formed an assessment of the strengths, opportunities, weaknesses, and risks of this model that ORC considered during the second Councillor Workshop. A summary of this analysis is outlined below. In addition, further operational and financial considerations for ORC are also outlined in this section.

7.4.5 Joint Venture – Collaborative or Co-Funded Arrangement	
Strengths	<ul style="list-style-type: none">▪ The model can be developed and scaled up over time – it can grow and evolve as it becomes more mature and embedded, for example, growing the number of partners involved, the level of funds committed or the addition of non-government partners in the joint arrangement.▪ Has the ability to reduce administration and compliance costs of grant making and procurement activities in environmental initiatives across local authorities in the region.▪ Greater coordination of investment decisions across local authorities can strengthen capacity and capability in this area.▪ Provides opportunities for ORC to leverage additional investment and funds that contribute to enhanced environmental outcomes.▪ Allows ORC to take a clear leadership role with their stakeholders and partners.
Opportunities	<ul style="list-style-type: none">▪ Potential to solidify a formal partnership with mana whenua and path to co-investment with mana whenua.▪ Potential to solidify a path to formal partnership with a philanthropic entity and a path to co-investment with a philanthropic investor.▪ Has the ability to reduce duplication in grant making and procurement activities in this area, as well as streamlining the application and accountability processes for community groups and providers.▪ Has the potential to increase trust between partners – at all levels within the system.▪ May provide ORC with opportunities to access systems and processes that are not currently available to the organisation, that may arise as a result of a collaborative arrangement. For example, access to sophisticated grant/funding allocation and accountability technology or frameworks a partner may have access to.
Weaknesses	<ul style="list-style-type: none">▪ It may be challenging to align the environmental and investment priorities of partners under a joint arrangement, particularly given regional variance.▪ It is unlikely that other potential partners will have the scale of responsibility and investment available that matches ORC – creating an imbalance of power and potential risks to collaborative decision making.▪ Achieving alignment of funding priorities across multiple mandated geographical boundaries can be difficult.▪ ORC cannot implement this model alone, and regardless of the readiness and desire of ORC to progress this, implementation will require the existence of at least one other partner who is at the same state of maturity or readiness to also commit/come together/co-invest.
Risks	<ul style="list-style-type: none">▪ The political and media environment may identify any negative situation that arises from a joint arrangement as a ‘failure’ or ‘waste’ which may cause reputational damage for all parties.▪ The internal cost to establish a collaborative or joint arrangement can be high, including time of internal staff resources to identify, negotiate, and manage joint arrangements, as well as legal costs.▪ There may be disruptions to the existing arrangements or funding allocations while ORC transitioned to a new joint arrangement.▪ The value proposition and benefit of a joint arrangement may not be strong enough for ORC to attract potential partners.▪ The partnership and collaborations need to be already working in practice before becoming formalised – forced partnerships are rarely effective.▪ It may be difficult to identify and implement an equitable joint arrangement, if, in a co-funding arrangement, all partners are not able to equally contribute. This may create challenges with perceived power imbalances or imbalanced distribution of funds.
Financial Implications	<ul style="list-style-type: none">▪ It may be difficult to obtain equality in investment across partners able/willing to collaborate. This can create challenges and tensions in achieving equity in funding allocation and investment decisions (e.g. those with more money wanting to have more power in decision making).▪ The collaborative partnership will need to clearly determine and agree the scope of the partnership – whether that is to work together for better environmental outcomes, or whether they will contribute joint funding to support grant funding or investment into community initiatives.▪ The administration costs (both internally to ORC and of the collaborative arrangement) may outweigh the direct financial benefit of the arrangement – that is, it may not be cost efficient or effective to have the arrangement in place.▪ The financial sustainability of the arrangement needs to be considered, especially if the collaborative arrangement is with an entity outside local government, due to differences in their planning and budgeting cycles. This can be equally challenging within the council structures as commitments are only likely to be made for one three-year LTP budget cycle (and then revisited annually as part of the Annual Plan process).
Operational Implications	<ul style="list-style-type: none">▪ The planning cycle and process for operational decision making may not align across ORC and others in a collective arrangement, especially those entities or funders outside of local government.▪ Long-term trusting relationships and partnerships take time to evolve and develop and required commitment and leadership from senior levels within the organisation.▪ It will likely take time, effort, and resource, to find the right partnership opportunities and alignment to suitable partners where there is alignment in strategic and operational aspirations, and geographical reach and coverage.▪ Working to develop and confirm an arrangement such as this in place will take considerable internal leadership capacity and capability to drive this forward – this type of collaboration does not happen by chance and will require intentional commitment and dedication to move forward.▪ Future-proofing the arrangement can be challenging if leadership or priorities of partners and/or co-funders changes, even if ORC’s commitment doesn’t wane. This can impact long-term funding relationships and credibility with communities and the environment sector.

7.4.6 Establish a Council Controlled Organisation (CCO)³⁹

Introduction to the Model and Procurement Approach

The Local Government Act (2002) provides local authorities with the ability to establish subsidiary entities to conduct both commercial and non-commercial activities. Under this model we refer to the establishment of a CCO in the broadest terms, which could mean a Trust or Incorporated type structure, with the intent of undertaking non-profit making activities. Amendments to the Act in July 2004 now outline the following definitions and explanations of the meaning of “council-controlled organisations” (CCOs) and Council Organisations⁴⁰ In the legislation, a CCO can relate to a range of structures including:

- A partnership
- A profit-sharing arrangement (excluding port, energy and electricity lines companies and their parent companies, as defined under Section 6(4) of the Act⁴¹)
- A Trust
- Union of Interest
- A Joint Venture or
- Other similar arrangement (but excluding a company, committee or joint committee of a local authority)

Under this model, ORC would seek to establish a separate entity in line with the statutory requirements of the applicable legislation – being one or more of either the LGA (2002), the Charities Act (2005) and/or the Incorporated Societies Act (2022). This entity would then hold the funds allocated by ORC as an endowment that would then have grant making powers to distribute funds to communities with the interest earned from investments.

Over time, there could be opportunities for the Trust⁴² to leverage and benefit from additional tax incentives that come through this structure or model or receive and hold additional investments made to the Trust by way of donations from individuals or other groups/funders.

This report does not detail these potential opportunities, as we are not qualified to do so, and with pending changes to the tax policies governing Charities and Incorporated Societies (which are currently under consultation), these may not apply to the same extent in future decision-making processes.

Regardless of the potential tax benefits from having these funds held in a standalone entity outside of ORC (but that is essentially owned by ORC), there are a number of factors ORC need to consider in determining whether this is a suitable funding mechanism to adopt in the short term. This acknowledges that there is “no perfect model” of CCO, and the structure, directors, monitoring and accountability framework used will all be dependent on the purpose of the CCO.

In considering whether a CCO should be established to administer environmental funding, ORC needs to consider the statutory requirements that it must meet in establishing, operating, and monitoring a CCO which include:

- The requirement for community consultation prior to establishment
- The requirement to adopt and enact a policy relating to the objective and transparent process of identifying required skills and experience of directors, appointment of directors, and remuneration of directors
- Considering and commenting on a draft Statement of Intent which the entity must prepare

- ORC outlining the policies and objectives of the CCO in the LTP and AP
- Effectively monitoring the performance of the CCO to determine whether it is achieving its objectives
- Monitor actual performance and achievements against planned performance in the Annual Report
- Provide audited financial accounts

These elements come with considerable resource and monetary costs to both ORC as the establishing body, as well as the CCO in its operations to ensure both parties meet their statutory requirements.

Governance of the Model

To implement this model, ORC would need to facilitate and support the process of establishing the new legal entity which would require ORC to undertake community consultation (as required under the LGA, and if favourable) establishment of a Trust Deed or Constitution, develop a policy to appointing directors and their remuneration, lead the process to appoint directors, and develop key policies and procedures required to establish the entity. This initial process would require significant investment from ORC in time and resource and would require significant governance and management oversight from Councillors and senior staff.

Following its establishment, of the CCO, ORC would need to take an interim governance role until staff and directors could be appointed to the entity and begin operations independently of ORC. Once these systems were in place, the CCO or Trust would set to develop their funding criteria and parameters and establish the structures necessary to make investment allocation decisions to support ‘large-scale environmental projects or initiatives.

Governance of the ‘large-scale funding’ would then come under the remit of the new entity, with ORC becoming a step removed from the process and having no direct governance oversight of the allocation of the ‘large-scale’ funds. The governance role that Council would assume under this model, would be to ensure that ORC was effectively managing the contracting arrangement between the council and the Trust and not to govern how funds are allocated. In this case, as the ORC would be the sole shareholder of the CCO or Trust (at least initially), it is likely that suitable ORC representation can be negotiated on the Board and reflected in the Trust Deed or Constitution. In this situation, a senior staff member would be the most appropriate member to sit on the Board given there can be regular turnover of elected members.

Fund Allocation Process

Following the process to establish the CCO and establish the scope of roles and responsibilities, it would be the role of the CCO or Trust to establish the systems and processes to administer and allocate ‘large-scale’ funding on behalf of ORC. It is likely that through the establishment phase of the entity, that ORC would request a seat at the table, specifying that ORC has a senior management or Councillor acting as a Trustee or Director under the Constitution, to retain an ongoing involvement in funding decisions.

As the CCO or Trust is tasked with allocating ratepayer funds on behalf of Council, the agreed process to allocate funding would need to align with Government Procurement Rules and best practice guideline to protect the transparency and validity of the process. This can be achieved by having an ORC appointed Trustee or Director.

39 We use CCO here in its broadest sense as defined by the LGA to include both profit making and non-profit making entities but do exclude the notion of establishing a CCTO from this analysis.

40 Reference LGNZ legislation – Section 6

41 The activities of these entities are governed by the Energy Companies Act 1992, and the Port Companies Act 1988.

42 We use the term Trust in our analysis as we have deemed this the most appropriate non-profit making CCO structure available to ORC through the legislation.

In the short term it would be considered most likely, that a CCO or Trust would implement a conditional grant process to allocate funding on behalf of ORC. If the CCO or Trust was able to leverage additional investment to support ORC investment, the suitable contracting mechanism to govern and manage this arrangement would need to be determined and agreed by all parties, noting that the allocation mechanism may change over time.

Following the allocation of funds, the CCO or Trust would report back to ORC against their contracted outputs and outcomes while the CCO or Trust would continue to monitor the performance of the funds allocated to community organisations to achieve 'large-scale' environmental impacts.

Ongoing Management of the Model

Once established, the new entity would have the ability to develop funding criteria and parameters and make investment decisions as it saw fit within the confines of its Statement of Intent or Constitution, with investment decisions made by the appointed Trustees or Directors. The performance of the entity would be contractually agreed and managed by the entity and ORC, but ORC would not have direct control over the funding decisions made by the Trust or CCO.

It is likely that this management role would also look at additional investment opportunities through donations, bequests, or other opportunities to leverage funds. The CCO or Trust would then report their performance against these measures back to the ORC.

Likely Timescale to Full Implementation

ORC is required to undertake a detailed statutory process prior to proceeding with establishing or funding a CCO or Trust and a key requirement of this process is to undertake community consultation. Given the time, cost and resource required to undertake consultation, it would be feasible to consult on this approach in the development of the ORC's next LTP, which will take place in late 2026/early 2027 for the 2027-2037 LTP cycle.

The outcome of the consultation process, and whether ORC should proceed with the establishment of an entity will not be known until mid-2027. If at this point, this approach is deemed reasonable, as the other required statutory processes will take significant time to put in place, depending on the level of internal resource dedicated to its establishment and operations.

For these reasons, we would anticipate this model to be a longer-term aspiration for Council, with an expected timeframe to full implementation to be at least five years.

Suitability of the Model Against 'Large-Scale' Funding Outcomes and Principles

Intergenerational Impact – establishing a separate entity to plan, administer, and monitor investment in large-scale environmental initiatives/projects (and possibly in time, additional ORC environmental investment) can achieve enduring impacts as the funding system can operate outside of the direct local government planning and budgeting cycles. The level of impact will be dependent on how the entity is established and initially funded, and its success in obtaining additional funding or leveraging additional investment. The true impact of the investment will however be contingent upon the funding allocation mechanisms that are put in place and the criteria established to allocate funding. As decision making will be removed from ORC and undertaken by a standalone governance board, intergenerational impact will be dependent upon the entity establishing processes that align with best practice and avoiding the pitfalls of other funding structures (such as contestable unconditional or conditional grant making processes).

Facilitation of collaboration across the system – the ability of this model to facilitate collaboration across the system will be dependent on the how the entity is established and operated. If this outcome is clearly defined in the establishment documentation of the entity, and if the performance against this outcome is clearly monitored by ORC, there is the opportunity for this model to support system collaboration. As is the case under each model, the success of enhanced collaboration across the system will be dependent on the leadership provided by ORC and having funds and processes in place that incentivise and reward collaboration.

Alignment to organisational strategy and strategic direction

– there is a risk that funding and investment decisions made by an independent entity can lose their alignment to the ORC strategy and direction. In time, if the Trust acquired funding from additional partners, this could be further challenged if priorities became competing between funders (for example, ORC may not remain the dominant funder over time, and priorities of another investor may dwarf the priorities of Council). As a standalone entity, funding and investment decisions will be based on aligning with the organisations Statement of Intent, Constitution, or Trust Deed (depending on the legal structure) and made by an independent governance structure. It may be possible for there to be ORC management or Councillor representation on a funding allocations committee or panel, but careful consideration would be needed to determine if this was appropriate, given that a key reason for establishing such as entity is to allow it to operate at arm's length from Council.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

In our review of the literature and from the feedback we received in the stakeholder interviews, we formed an assessment of the strengths, opportunities, weaknesses and risks of this model that ORC considered during the second Councillor Workshop.⁴³ A summary of this analysis is outlined below. In addition, further operational and financial considerations for ORC are also outlined in this section.

⁴³ Additional information has been added to this assessment following further review of the literature and data.

7.4.6 Establish a Council Controlled Organisation (CCO)	
Strengths	<ul style="list-style-type: none">▪ The entity can have a separate brand and identity that distances it from the Council. This can allow for more meaningful engagement with communities and potential funders/donors.▪ The entity could access charitable tax benefits and leverage charitable benefits and additional investment.▪ The entity can leverage additional investment in the way of donations, bequests or investments. People may be more likely to make these types of directed donations to a charitable entity over a council entity.▪ An independent governance board and structure removes funding decisions from political decisions.▪ A skills-based governance board allows for improved commercial and investment decision making.▪ Financial risk is ring-fenced under a charitable or incorporated society structure which protects ORC from financial liability from an activity or another party.▪ Separation of financial from political decision making.
Opportunities	<ul style="list-style-type: none">▪ If additional funding is leveraged, it can Increase the overall pot of funding available to invest in environmental initiatives.▪ It could lead to the creation of innovative funding and partnership arrangements, led by ORC.▪ Could achieve regional spread and landscape scale environmental outcomes if the scale of leveraged investment allows (for example, additional funding secured from a funder that has cross-regional coverage).▪ Can lead to greater community empowerment as a Trust model allows for communities to have a closer involvement in decision making.▪ The entity can access additional revenue from a wider source of funding options than would be available to Council – such as receiving bequests, donations and grants from individuals or other Trusts and philanthropic investors. It may also create opportunities for alignment to the tourism and commercial sectors.
Weaknesses	<ul style="list-style-type: none">▪ It will take considerable time and resources to establish and to be fully operational.▪ Will require separate policies to outline the governance, management and accountability requirements of the entity to ORC.▪ The new entity will require funding to administer and run its operations, including remuneration of directors/trustees and it may not be cost-effective to do so.▪ There will be additional workload and expectations placed on existing Councillors and/or ORC staff to ensure the new entity has effective representation.▪ Investment decisions could become more closely linked to community expectations rather than council priorities or strategy.▪ This can lead to reduced direct accountability to ratepayers for the funding and allocation decisions made by the Trust/entity.▪ The Trust will incur additional ongoing costs to manage and monitor the performance of the entity that can diminish the value of the investment that can be made directly into communities.
Risks	<ul style="list-style-type: none">▪ Until such time as additional investment is leveraged to support initial ORC investment, the model can be seen as costly, with little direct benefit to ratepayers.▪ ORC policy and environment expertise and knowledge becomes removed from the decision making and grant allocation processes.▪ Investment decisions can lose alignment with strategy and ORC priorities.▪ There is a reduced ability for Council to manage risk – arm's length delivery can make managing reputational risk more challenging.▪ If ORC seeks to appoint Councillors as directors, this raises a concern in relation to management of conflicts of interest and potential double payment to elected members for undertaking a role they were already undertaking before the entity was established.
Financial Implications	<ul style="list-style-type: none">▪ There will be an ongoing annual cost to manage and administer the entity as it will require its own financial accounts, staff to administer the activities of the entity and possible remuneration of Trustees/Directors.▪ The charitable incentives that could be achieved through this model may not out way the costs, especially considering possible proposed tax changes for charitable entities.▪ ORC needs to determine the long-term sustainability of the Trust in the long term and whether leveraged investment is likely, or whether the interest earned off the initial endowment is sufficient to sustain investment in large-scale environmental initiatives in the long-term.▪ The model may not present value for money without committed co-investment or funding.
Operational Implications	<ul style="list-style-type: none">▪ The model will take considerable time, cost and resources to establish and to become operational.▪ Will require internal support to establish a legal structure, board and to establish and employ staff to manage the ongoing operations of the entity plus any contracting or funding arrangements between ORC and the entity.▪ Will need dedicated resource to attract and confirm co-funding or co-investment arrangements.▪ Council needs to consider whether this model is the best mechanism to achieve the Councils objectives.▪ The model will need to prove it can provide value for money and increase efficiency over other models.▪ ORC will need to determine whether it has ongoing capacity and capability to oversee the entity as ongoing oversight will include requirements to:<ul style="list-style-type: none">▪ Appoint/reappoint Directors or Trustees▪ Manage an effective relationship between Council and the entity▪ Set up and ongoing adherence to an appropriate monitoring framework▪ Engaging with accountability and reporting documents prepared by the entity and▪ Meeting the ORCs own accountability and reporting requirements under the LGA (2002).▪ ORC will need to ensure that the LGA (2002) requirements of a CCO/Trust are met including the preparation and auditing of separate financial accounts, as well as branding, marketing etc.

7.5 Summary of Model Alignment to Key Principles and Outcomes

Below is a summary of the key factors and variables for each of the six-models. We have also assessed the likelihood of the model achieving the agreed key principles and outcomes of 'large-scale' environmental funding. Note that an assessment of 'likelihood' has been made based on our assumptions from the information we had available to prepare this report. A model's overall likelihood of success cannot be identified as this stage of the process and would be dependent on several factors that are not yet confirmed or are unknown.

Figure 11: Summary of Funding Model Features and Alignment to Key Principles and Large-Scale Fund Outcomes

Funding Model – Large-scale Contestable or Grant Making Fund		
Procurement Approach	Conditional Grant administered by ORC	
Governance of the Mode	ORC CEO & Councillors	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">▪ Open application process via existing grant portal.▪ Applicants reviewed and scored against consistent criteria.▪ Top scoring or complying applicants receive funding (values usually variable).▪ ORC enters into grant agreement and undertakes monitoring and accountability to project completion.	
Ongoing Management of the Model	Administration of the Fund and ongoing contract management undertaken by Environmental Implementation Team.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Unlikely
	Facilitation of Collaboration across the system	Unlikely
	Alignment to organisational strategy and strategic direction	Possible

Funding Model – Structured Purchasing Approach (minor or major relational purchase)		
Procurement Approach	Single or multi-stage process via ROI, RFP, RFT administered by ORC	
Governance of the Mode	ORC CEO & Councillors	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">▪ ORC seeks interested organisations to complete a ROI which assessing their eligibility against a pre-set criterion. Offer is advertised via GETs.▪ Interested organisations who meet the eligibility conditions, register their intent to apply.▪ RFP is released to those parties who have submitted and met the conditions of the ROI (either directly or via GETs).▪ RFPs reviewed against a weighted scoring matrix and preferred suppliers identified.▪ Contracts negotiated and agreed following approval from Council. Delivery monitored against contracts outlining key milestones and KPIs.	
Ongoing Management of the Model	Administration of the Fund and ongoing contract management undertaken by Environmental Implementation Team.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Likely
	Facilitation of Collaboration across the system	Likely
	Alignment to organisational strategy and strategic direction	Likely

Funding Model – Funding via the ICM Programme or by CAP		
Procurement Approach	Direct source purchase administered by ORC	
Governance of the Mode	ORC CEO & Councillors	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">▪ Following ORC endorsement of a CAP, the CAP Governance Group prepares a staged Implementation Plan and budget with input from ORC.▪ CAP Governance Group prepares a proposal to seek investment from ORC for a 2-yr period.▪ ORC reviews the proposal and allocates funds to support CAP implementation via a direct source purchase.▪ CAP Governance Group (or other suitable legal entity acting on behalf of the Governance Group such as an 'umbrella entity') distribute funds to projects and initiatives prioritised within the CAP.▪ CAP Governance Group report back to ORC on delivery of projects against Implementation Plan.▪ After the initial two years of the 'large-scale' funding, the process is reviewed and a prioritisation framework developed to help guide future CAP investment decisions. This accounts for more CAPs being in place and greater competition for funds across the region.	
Ongoing Management of the Model	Administration of the Fund and ongoing contract management undertaken by Environmental Implementation Team	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Likely
	Facilitation of Collaboration across the system	Likely
	Alignment to organisational strategy and strategic direction	Likely

Funding Model – Devolving 'Large-scale' Funding to a third party		
Procurement Approach	Purchase arrangement to secure a third-party entity via closed RFT or direct purchase administered by ORC Allocation of funds by the third-party to the community could be via conditional grant or purchase.	
Governance of the Mode	ORC CEO & Councillors to ensure performance of the third-party. CEO & Board of the Contracted Party to govern the 'large-scale' fund.	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">▪ ORC seeks ROI from interested entities wishing to partner with them.▪ If multiple parties come forward, ORC runs a closed tender to determine the most suitable partner.▪ If only one interested party is identified, following due diligence, ORC enters into an agreement (such as letter of expectation) to outline roles and responsibilities and processes for allocating ORC 'large-scale' funding.▪ The contracted party develops and administers their own fund process and parameters to allocate 'large-scale' funding.▪ Funds are allocated via the process established by the contracted entity.▪ The contracted party reports back to ORC against their contracted outputs and KPIs and ORC monitors their performance.	
Ongoing Management of the Model	<ul style="list-style-type: none">▪ Administration of the Fund is undertaken by the contracted entity.▪ The contract administration and monitoring of contract performance undertaken by either an experienced ORC staff member within the Procurement or the Environmental Implementation Teams.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Possible
	Facilitation of Collaboration across the system	Possible
	Alignment to organisational strategy and strategic direction	Possible

Funding Model – Joint Venture		
Procurement Approach	<ul style="list-style-type: none">MoU or Shared Services Arrangement between ORC and collaboration partners.Allocation of funds to the community by the collective or partnership could be via conditional grant or purchase.	
Governance of the Mode	<ul style="list-style-type: none">ORC CEO & Councillors to ensure performance of the Joint Venture.Collective Governance Group established under the Shared Service or MoU to govern the 'large-scale' fund.	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">Following the full establishment of the Joint Venture, funds would be allocated to the collective governance group under a Shared Service Arrangement.The governance group of the Joint Venture would establish the systems and processes for allocating the funds. A Council staff member or Councillor would sit on the governance group.Funds are allocated via the process established by the Joint Venture Governance Group.The Joint Venture Governance Group (via the ORC representative) reports back to ORC against their contracted outputs and KPIs and ORC monitors their performance, ensuring ORC interests are maintained.If over time, the funds allocated by each member changed, ORC's role and level of influence may reduce (if they were no longer the primary funder).	
Ongoing Management of the Model	<ul style="list-style-type: none">Administration of the Fund is undertaken by the Collective Governance Group or Allocation Panel (which would include ORC senior management representation).The overall management and monitoring of the Joint Venture would be undertaken by ORC CEO and may include Councillor representation to ensure effective ongoing monitoring of the collaboration.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Likely
	Facilitation of Collaboration across the system	Likely
	Alignment to organisational strategy and strategic direction	Possible

Funding Model – Establish a CCO		
Procurement Approach	<ul style="list-style-type: none">Statement of Intent and Letter of Expectations set out by the CCO and agreed by ORC, plus additional purchase contract.Allocation of the funds by the CCO to the community could be via a conditional grant or purchase.	
Governance of the Mode	<ul style="list-style-type: none">ORC Councillors to ensure performance of the CCO.Board of the CCO to govern the 'large-scale' fund.	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">Following the full establishment of the Entity, funds would be allocated to the CCO via a letter of expectation with the intended use of the funds outlined in their SOI or Deed.The Trust would establish the systems and processes for allocating the funds. A Council staff member or Councillor may be an appointed Trustee on the CCO.Funds are allocated via the process established by the CCO/Trust.The CCO/Trust reports back to ORC against their contracted outputs and KPIs and ORC monitors their performance.	
Ongoing Management of the Model	<ul style="list-style-type: none">Administration of the Fund is undertaken by the CCO.Ongoing monitoring of the CCO and Fund performance (including administration and monitoring of performance against the Letter of Expectations) to be undertaken by senior ORC staff member within the Procurement or the Environmental Implementation Teams.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Possible
	Facilitation of Collaboration across the system	Possible
	Alignment to organisational strategy and strategic direction	Possible



Figure 12: Models to be included in prioritised analysis and assessment

The outcome of the prioritisation process undertaken by Council is outlined below which forms the basis of the content in the following sections of this report.

Funding Model	Model Prioritised for Further Consideration
Large-scale contestable or grant making Fund	✗
Structured Purchasing Approach	✓
Funding via the ICM Programme or by CAP	
Devolving 'large-scale' funding to a third party	✗
Joint Venture	✓
Establish a CCO	✓





Prioritised Funding Model Analysis

8.1 Introduction

As part of the second Councillor Workshop, attendees were asked to prioritise each model identified against a two-dimensional, four quadrant model (as deemed best practice guidance by the AOG). The outcome of that review is identified under each option in the sections above, but the overall outcome of the process was to allow Councillors to determine what options warranted further analysis and investigation.

This process concluded that:

- Increasing the scope and reach of the current ECO Fund model (to allow for a further sub-set under this structure focused on supporting 'large-scale environmental initiatives') would not effectively support Council to achieve its desired outcomes and aspirations that this fund seeks to achieve and therefore was discounted from further consideration.
- A more defined model of contestable investment that outlined clear criteria and sought investment from suitably qualified suppliers against a list of clear priorities (in line with the outcomes to achieve) had merit but should be investigated in conjunction with a model that supported implementation of the ICM process and associated Catchment Actions Plans. Councillors agreed that this report was to further investigate options for a new model that was a hybrid of the structured procurement approach initially proposed, and the model that proposed funding by ICM or CAP.
- The risks associated with all scenarios outlined that would involve contracting a third-party to administer the funding and/or grow the funding on behalf of ORC were deemed to erode transparency of ORC to ratepayers and therefore discounted from further consideration.
- The opportunities to build a collaborative model were encouraging, and developing a joint venture or co-funded model was a future state that Council aspired to. It was also recognised that the likelihood of implementing a collaborative model from the outset was low, and more time and a deliberate plan would be needed to reach this model in future. Council agreed that this report was to further investigate how this model may be developed and implemented over the medium to long term.
- There are opportunities and advantages to establishing a separate entity such as a Trust or CCO to both hold and invest ORC funds as an endowment to support and grow future investment, and to potentially attract additional philanthropic investment. It was recognised however that the advantages and opportunities need to outweigh any administrative or financial costs in establishing and maintaining such a structure. Council acknowledged that establishing such a model takes significant lead in time and the existence of high trust partnerships, as well as significant commitment and drive from the lead entity (in this case, ORC). Council agreed that this report was to further investigate how this model may be developed and implemented over the long term.

8.2 Prioritised Funding Model 1 – Structured Procurement aligned to CAP Implementation

Introduction to the Model and Procurement Approach

This hybrid model was to take the elements of a more structured procurement approach and align it to the ICM framework currently being used by ORC to plan and prioritising areas of focus at a catchment level. This model outlines a procurement approach/funding model that is aligned to implementing a structured procurement approach, aligned to the implementation of Catchment Action Plans.

As outlined above, implementing a more structured purchasing model (as opposed to a grant making purchasing model) allows for greater clarity and efficiency in funding decisions, and would allow ORC to provide greater leadership and direction to the market/sector as to the nature of the projects/initiatives it seeks to fund against a pre-determined eligibility criterion. Under this model, several procurement options were identified as being available to Council, with a multi-stage process being suggested, that would ask organisations to self-assess against a detailed eligibility criterion and submit a ROI if they met the criteria. The second stage proposed that eligible organisations to submit an RFP against a Council defined process.

Using this structured procurement approach and aligning the use of the funding to the Catchment Action Planning process allows ORC to have a clear line of sight from strategy to funding prioritisation and service or programme delivery directly into communities. It would allow for investment decisions to be linked to robust prioritisation processes, informed by science and evidence, that have been community led, and have achieved engagement and endorsement from mana whenua.

As identified earlier in this report, there is currently no defined funding stream within Council to support the implementation of CAPs once they have been completed and endorsed by Council. The \$100,000 currently approved to support implementation of the Catlin's CAP is a one-off investment with no mechanism currently in place to support ongoing funding to fund implementation of this CAP or others across the region. Logically, the 'large-scale' fund provides opportunities to align the funding to the CAP process, while implementing a robust procurement approach to ensure equity and transparency in investment decisions.

Purchasing decisions would be made against a detailed eligibility criteria that would include a **weighting towards initiatives and projects that support implementation of CAPs** however this would not be the only determining factor to assess eligibility.

This hybrid model does however present several limitations, most arising from the intention to align the CAP process with a structured procurement approach to support 'large-scale' investment. These limitations are outlined in detail in our analysis of the strengths, opportunities, weaknesses and risks of the model outlined further in this section of the report.

We do want to stress that aligning 'large-scale' funding to the CAP process alone will not increase the likelihood of ORC achieving the intended outcomes of the large-scale fund in the short term and create further inequities and inefficiencies in the way environmental implementation initiatives are funded. A more conservative approach would be required in the short term to ensure that there is greater alignment of the structured procurement process to the breadth and depth of CAPs that have been undertaken.

Some key features that warrant additional mention in relation to this hybrid model are outlined below:

- There is **currently only one approved CAP in place** (Catlins), with another one likely to be completed by the end of the 2025 calendar year (Q1 and Q2 of the 2025/26 FY) being the Upper Lakes CAP. Based on the current planning trajectory, **only three to four plans will likely be completed during the approved LTP cycle of funding**, with further CAPs (possibly as many as six) needing completion during the full 10 year LTP planning cycle.
- The **process and approach to ICM evolves and develops as learnings from one process are taken into the next**. This means that the look and feel of a CAP will change over time, which may potentially unfairly disadvantage those CAPs completed earlier in the process.
- There is a **potential advantage towards those groups (such as the Catlins) who have already completed their CAP**. They have time and opportunity to develop and grow ahead of other regions that may still be more immature. Groups who develop CAPs later in the process will not be afforded the same opportunity.
- There are **communities developing their own catchment plans that are being completed without ORC support or investment**. These processes have good community engagement and ownership but may not be detailed or comprehensive enough to meet a procurement threshold for ORC investment.
- There is **currently a level of confusion around the ICM and CAP process with a variety of catchment groups existing across the region that range in size and scale** (usually farmer and landowner led and focused on water quality) and several planning processes being undertaken by these groups. In addition, ORC funds Otago Catchment Communities Inc to support these groups, and they offer small funding grants to support these groups and their activities.
- **Some communities and capable/sustainable community organisations/providers may not be eligible to access large-scale funding** if a mandated CAP process is not in place in their community. This is inequitable and unfair to those organisations who have the ability to make a meaningful impact.
- Many of the environmental gains that have been made because of work conducted on individually or privately owned land. **Bigger community providers and entities don't have or can't access this land**.
- As with the case in the Catlins, **some communities may not have formal organisational structures in place that can hold and administer ORC funding to support CAP implementation**. The current CAP implementation funding allocated to the Catlins is being held by ORC in lieu of a formal entity being in place, and the process to establish an entity takes time and resources to establish.
- Eventually, a **criterion will still need to be in place to allow for prioritisation decisions to be made between/across plans and initiatives and guide investment decisions**. Once the CAPs cover the region, it will not be possible to prioritise every activity across every catchment area.

- Depending on the scope and parameters of investment via the CAP process, **ORC will need to be extremely careful not to duplicate small grant making distribution structures.** For example, current CAP funding to support the implementation of the Catlin's CAP is likely to be allocated to smaller community groups to support their projects that focus on achieving deliverables and outcomes against the plan. This potentially duplicates the role of the ECO Fund and Otago Catchment Communities Inc and shifts funding and accountability requirements to community groups that may not have the capacity and capability to effectively do this. It will require the development of additional application, allocation, and monitoring processes that reduce efficiency and increase fragmentation and duplication.

Although the coming together of both models into a hybrid structure has merit, it is unlikely that the CAP process alone will be adequate to allocate the level of funding budgeted over the next two years.

A possible way of bringing these approaches together into a hybrid model, would be to include the robust elements that a relational procurement purchase can enable (such as implementing a clear eligibility criteria), while incentivising the adoption of the formal ORC CAP process at the same time.

Governance of the Model

Governance of this hybrid model relates to the specific governance of the funding model and does not relate to the governance of the overall ICM Programme which is outlined in detail in Section 7.4.3.

We propose that this model would be governed in the same way other contracting agreements are within Council, depending on the value of the contract (as per the ORC Delegations of Authority policy). It would be the role of Council to ensure that procurement best practice and policies have been adhered to, and that value for money decisions have been made because of the processes undertaken

As we have identified in earlier sections, we recommend that elected members are not part of the Evaluation Panel process to make funding decisions. They play a key governance role in ensuring sound procurement decisions are made and monitored, and while they have a keen interest and passion for what is taking place within their wards, this negatively affects the transparency of the process, especially when multiple catchments may be competing for funding over time.

Given the heavy ORC staff input and guidance that is required throughout the ICM Programme and CAP development, these staff should also be excluded from participating in procurement or funding allocation decisions due to the perceived conflicts of interest or inherent bias that their involvement in the CAP development may create.

Fund Allocation Process

As outlined above in Section 7.2.2, funds could be allocated via a two-stage process. Firstly, interested organisations would complete a **Registration of Interest** which would require them to assess their capability of delivering 'large-scale' initiatives against a pre-eligibility criterion to assess whether they qualified to submit a full proposal. The registration process would be advertised on GETs or a similar procurement platform.

The alternative to this, is that funds are allocated via another methodology that is outside of an openly contestable model such as a closed competitive process or a direct source process.⁴⁴ This would allow ORC to direct funding to support the implementation of a CAP as it was completed. Under a **closed**

competitive approach, ORC could request proposals to a limited number of known organisations, which would be feasible when CAPs are region specific.

ORC may also be able to allocate funding via **direct source funding**, where ORC runs a closed process to request a tender, proposal or quote which is restricted on only one known supplier. This is the model proposed in Section 7.4.3 which suggested allocating this funding by CAP and directing it to communities to support CAP Implementation Plans as they were completed.

A direct source approach does not mean that funds are automatically allocated to a catchment group, they would still need to submit a proposal that was evaluated, assessed on its value, and undergo due diligence before ORC determined that the organisation had the capability to deliver on the required outcomes.

A hybrid allocation process is possible, where organisations will still need to provide suitable evidence that they are eligible to apply for 'large-scale' funding. This model could include a two-stage process, where the first stage (ROI) includes a more stringent eligibility or pre-procurement criteria that is weighted towards those organisations and communities that are actively engaged in the CAP process or that have a CAP Implementation Plan prepared that has been endorsed by mana whenua and Council.

To maintain the integrity of the procurement process, ORC will need to ensure that the following elements are retained within the allocation process including:

- Administering the process through a suitable procurement platform.
- Preparing detailed procurement documentation including an outline of the services sought, weighted scoring criteria and response template to ensure key information was captured.
- Guidance on the value of contracts and contracting period.
- Providing structures and transparent processes for submitting and answering questions (to ensure every organisation receives the same information at the same time, and no one is unintentionally advantaged or disadvantaged).
- Proposals assessed against the evaluation criteria by an independent Evaluation Panel. Those staff working alongside communities in the development and preparation of CAPs should not be included on the Panel to avoid any perceived or actual conflicts of interest or bias that may arise from their close working relationship with community organisations.
- Any procurement recommendations made by the Panel are submitted to Council for endorsement or approval (subject to ORC Delegations of Authority Policy).
- Detailed contracting agreements would be negotiated and signed between the successful organisations and Council that would outline the key deliverables and milestones for the initiative as well as the expectations around monitoring and evaluation of delivery. This may include the rights of Council to undertake external evaluation or an annual review of performance.
- Establish robust contract management processes internally that align with and support the work being undertaken within communities by other parts of council and the Environmental Implementation Team.

Ongoing Management of the Model

The ongoing management of this model is comparable with the approaches outlined in both Sections 7.4.2 and 7.4.3 with the ongoing management of this model to be undertaken by ORC staff within the Environmental Delivery Team.

⁴⁴ As per Rule 14 of the Government Procurement Rules.



The Environmental Delivery Team could design and administer the initial procurement process, including the development of the procurement documentation (including confirmation of the pre-eligibility criteria), RFP documentation and guidance documents, including scoring criteria.

An advantage of this model is the administrative efficiency that can be gained through this funding model. Given the level of sophistication in this procurement approach and the financial value that each initiative is likely to attract, it would be recommended that only one funding round was held over the two-years of the funding. This would mean that this process would seek to allocate \$4 million over a two-year period (rather than undertaking this annually) – assuming investment stays at the level that it is currently approved at. These administrative processes can further be reduced by including Right of Renewal clauses or ‘stop-go’ mechanisms within the contracting process which rewards high performing organisations and initiatives and allows for contracts and funding to be extended into the next LTP cycle without running additional procurement processes.⁴⁵

Regular ongoing contract monitoring would be managed by ORC and undertaken by staff with the relevant skills and experience to monitor performance against contracted outputs and outcomes.

Likely Timescale to Full Implementation

This model could be implemented in the short term, with funds allocated by the end of this calendar year.

Ensuring effective communications and support is provided to both to communities and community organisation and internally within ORC will be as vital as ensuring ongoing resources are in place to manage the contract delivery once funds are allocated.

Once funds are allocated, it is expected that contracts would be in place for 18 months (of the 24 months available to account for the procurement process) beginning 1 January 2026 and ending on 30 June 2027.

⁴⁵ This may only be applicable and valid for some agreements and may not apply to all funding budgeted or all contracts/projects/initiatives.

Suitability of the Model Against ‘Large-Scale’ Funding Outcomes and Principles

Intergenerational Impact – introducing a funding mechanism that supports the ICM process, and the implementation of community-led CAPs is highly relevant to achieving this outcome, as the CAP process takes a landscape scale lens, involves multiple stakeholders, and takes a long-term approach to environmental management. Funding against a plan that is supported by evidence and science, is endorsed by mana whenua, the community, ORC and aligns with the community’s environmental aspirations to protect the area for future generations, is highly relevant in aligning investment to achieving intergenerational impact.

Facilitation of collaboration across the system – this model has the opportunity to facilitate collaboration, particularly as it is a key requirement of the CAP process and can be woven into a formal procurement process depending on the criteria and priorities outlined in the procurement documentation. Where facilitating collaboration may fall down under this model, is where communities may need to compete to access funds to support the CAP implementation, or where the process to completing CAPs is evolving – not every community will have a CAP in place at the same time, so may not be able to access funding more years later than a neighbouring community.

Alignment to organisational strategy and strategic direction – funding CAP mechanism via a structured procurement approach, should create a strong alignment to strategic direction, particularly as the priorities outlined in the plans are aligned to data and evidence. Prioritising all elements within the implementation plans will be the challenge and the way in which Council actually allocates funds towards the implementation of the Plan can impact the success of this outcome. There is a risk that low-hanging fruit may be implemented first (to prove value), while more complex pieces of work (that could achieve greater outcomes), may be avoided if their overall value is difficult to prove in the short term. This model will likely maintain alignment to strategy, as long as the intent of ‘large scale’ funding is maintained.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

As outlined in Section 7, we undertook an analysis of the strengths and weaknesses, opportunities and challenges that ORC may encounter in relation to each of the six funding models identified.

In looking at the hybrid approach as a prioritised model, we undertook further analysis and have outlined this in relation to this model below. You will note that many of the strengths, opportunities, weaknesses and challenges identified in Sections 7.4.2 and 7.4.3 are replicated here, as well as new ones identified to reflect the proposed hybrid model.

7.4.6 Establish a Council Controlled Organisation (CCO)	
Strengths	<ul style="list-style-type: none">▪ Allows for clear alignment from organisational strategy to community priorities, supported by data and evidence.▪ Clear plan and pathway to development, implementation and a region-wide consistent process.▪ Provides a clear commitment to communities that priorities and issues will be supported by ORC once planning has been undertaken.▪ Incentivises communities to undertake the CAP.▪ The process is collaborative in nature, involving the Council, landowners, community groups and mana whenua in the development of the CAP.▪ Internal structures are already in place that is effectively supporting the ICM process with communities.▪ There is a plan and processes in motion internally that outline the timing and resources required to complete the CAP process across all 10 catchments.▪ Allows ORC to target particular outcomes, activities, groups, or all three.▪ If there is collective alignment of ORC work programmes and community delivery to the CAPs (that is, alignment of the strategy to the 'doing'), then the council, mana whenua and communities all experience good outcomes.
Opportunities	<ul style="list-style-type: none">▪ The CAP process is developed in such a way that allows for the recording of data and evidence that can support ORC to meet its objectives relating to environmental impact and outcomes.▪ Increased community engagement in the CAP process if implementation funding is more likely to follow.▪ Increased credibility of ORC with communities as providing a commitment to communities to support implementation after planning has been completed.▪ There are existing mechanisms in place (such as existing strategies and plans) that can be used to guide equitable funding allocation that can act as a placeholder until there is a more regional spread of approved CAPs.▪ If funding was only allocated by CAP as implementation plans were completed, ORC may be able to rate for less funding as it's unlikely that \$2 million would be needed in the first year of allocation.▪ Increased opportunities for better relationships, collaboration and coordination between ORC, community partners and mana whenua.
Weaknesses	<ul style="list-style-type: none">▪ The relationship with mana whenua is variable depending on the catchment area and the level of maturity in collaboration is not equal across the region.▪ It will take a decade for a consistent CAP process to be in place across all catchments.▪ Likely limited capacity and capability of groups leading CAP processes to hold, administer and be accountable for funding.▪ The current internal capacity and capability is targeted towards the technical skills needed to develop a CAP (planning and analyst etc) and additional procurement capacity and capability would be needed to effectively implement this model.
Risks	<ul style="list-style-type: none">▪ Funding allocation is not equitable in the short term if groups are only eligible to apply for funding if an approved CAP is in place.▪ Not all communities will have established and mature entities and organisations in place to receive and use funding allocated by ORC.▪ Need to ensure that this process does not duplicate current small grant making processes, particularly in the large-scale funds allocated through the CAP process are then further allocated to support individual small projects within communities.▪ Will need to be careful that the ECO Fund process is not duplicated through another mechanism (by funding small community led projects).▪ Will need to ensure there is clarity to differentiate the role of the ECO Fund with large-scale funding in supporting CAP implementation. For example, will catchment groups be excluded from applying to the ECO Fund.▪ Reputational risk to Council if 'large scale' was scaled back significantly to account for a small number of CAPs and their inequitable distribution across the region.▪ Appropriate accountability and transparency mechanisms will need to be put in place to ensure that money given to Catchment Groups is used within appropriate guidelines set out by ORC (for example, will Catchment Groups further allocate funding to support local project delivery?). These groups will need to have suitable capability and experience to do this in line with council procurement requirements.
Financial Implications	<ul style="list-style-type: none">▪ Without an additional funding mechanism (outside of the CAP), it is unlikely that the full funding can or will be allocated over the three years.▪ There will need to be clear parameters for the use of the funding once allocated to communities, to ensure that further grant making processes are not put in place or duplication created.
Operational Implications	<ul style="list-style-type: none">▪ An increase in internal resourcing, capacity (and potentially different capability) will likely be required as plan development and funding implementation activities ramp up.▪ Managing community expectations may be challenging, particularly those that may have a CAP process underway (and therefore may not receive funding). This can suck time and resource away from the work with those communities already active in the ICM process.▪ Duplication and inefficiencies may occur if projects and initiatives are developed and invested in on a CAP-by-CAP basis rather than looking at opportunities for a region wide approach to meeting outcomes or solving issues.▪ The model may require variances in funding criteria and approach (such as having different criteria and prioritisation frameworks in place for those community organisations where a CAP is not in place). This could lead to confusion and risk consistency if variable methods were introduced to ensure the fund achieved regional coverage or funding equity.

Pathway and Conditions to Model Implementation

It is likely that this model is a realistic option for ORC to consider implementing in the short to medium term, but it may not be possible to effectively implement the alignment to the CAP process in its entirety within the current LTP allocation.

It is more feasible, that over the short-term, a robust procurement approach is put in place, which focuses on establishing and monitoring effective relational agreements, investing in mature and capable providers, targeting the delivery of outcomes, and supporting existing initiatives.

These conditions could then be assessed against a clearly defined and communicated eligibility criteria that gives communities and community organisations clear signals on the following:

- The principles and outcomes by which ORC defines ‘large-scale’ investment.
- The ability of the organisation to contribute to achieving the goals and objectives of ORC (where clear attribution exists between initiatives and achievement of outcomes via an intervention logic).
- How the initiative aligns with the outcomes and aspirations of the Catchment Action Plan, or in lieu of this (noting it may be under development or on a path to development), how it aligns with other key documentation such as the Biodiversity Strategy and implementation Plan (after 2026), or Wilding Conifer Strategy.
- The commitment of Council to invest in multi-year agreements that span two years initially, with opportunities to extend these agreements should funding allow.

Should ORC wish to pursue this model (that is full alignment to the CAP process) as a suitable medium to long term option, then further work should be undertaken over the next two to three years to more clearly understand the feasibility of this model on an ongoing basis. Conducting further analysis and feasibility should include the following:

- Determining a process for equitable distribution of funding to those catchments that still will not have a CAP in place by 2028 or
- Determining options to accelerate the development and adoption of CAPs to ensure that wider coverage is achieved following the first two years of ‘large-scale’ funding. This could include increasing internal capacity and capability to achieve this.
- Allocating investment (if the current funding available is not fully allocated in the first two years) to support community readiness to complete the CAP process, whether that be investing in capability building and governance activities of smaller entities and organisations.

**8.3 Prioritised Funding Model 2
– Investing in Large-Scale
Environmental Initiatives via a
Joint Venture or Co-Funding
Arrangement**

Introduction to the Model and Procurement Approach

Following the second workshop with Councillors, we were asked to provide further analysis of this funding model, specifically with the view to this model being a medium to long term option for Council to consider.

We have provided a thorough explanation of this model in Section 7.4.5 above and have outlined a robust explanation of the model as well as the likely strengths, opportunities, weaknesses, and risks to implementing this model.

Pathway and Conditions to Model Implementation

It is difficult to provide definitive recommendations as to whether ORC should proceed with the development and use of this model to allocate ‘large-scale’ funding (or other environmental funding it currently allocates to landowners or community organisations).

The scope of this project has not gone far enough to allow us to provide advice to ORC on the appetite of other potential partners or stakeholders (including, but not limited to, other local authorities or philanthropic investors) to set up a collaborative or co-funded joint venture to drive investment in this area. While our discussions with possible funding partners have been positive, they have been brief, and have not necessarily been held within the senior management or governance levels of the organisation, who have the mandate to make such commitments.

Should ORC want to pursue this model as a suitable medium to long term option (that is, past the first two years of budgeted funding (from 2027/28 FY onwards), then further work should be undertaken over the next two to three years to more clearly understand the feasibility of this model. Conducting further analysis and feasibility should include the following:

- Undertake detailed feasibility and financial analysis to better understand the internal and administrative costs required to govern, manage, and administer such an arrangement. This should provide an assessment of the costs and benefits to ORC and the community by having such a model. This may or may not be an initial first step and may need to be conducted once partners have been identified and indicated a high-level intention to partner or co-invest.
- Begin more formal conversations with potential statutory joint venture/co-funding partners to determine the scope of opportunity that is available. Initial discussions should be prioritised with mana whenua as well as the existing local authority partners in Otago.
- Depending on the outcome of the recommendation above, begin more formal conversations with potential community or philanthropic joint venture/co-funding partners. Initial discussions should be prioritised with Otago Community Trust (as they have already expressed an interest), as well as other funders operating within ORC boundaries, particularly Central Lakes Trust, Whakatipu Community Foundation and the Community Trust of Southland.⁴⁶
- If this model cannot be progressed locally (due to insufficient interest or commitment), seek to begin discussions with other potential joint venture or co-funding partners outside of the Otago region. Possible entities to engage could include (but are not limited to) DOC, MfE, The Nature Conservancy, NZ Nature Fund and NEXT Foundation.

⁴⁶ Note that we did not consult with CLT or CTOS through this process so are unaware of their level of interest to engage in further discussions at this point.

- Undertake consultation with community groups and organisations to obtain their views and feedback on the appropriateness of this model, noting that consulting on a developed idea (that has tangible partners interested) will be of greater benefit and importance than consulting on an aspirational idea (which is what this report has done).
- Direct internal resources to work through the policy, contracting, financial and accountability requirements needed to establish a structure under this model. This will also need to determine the levels of internal resource to establish as well as maintain a joint venture or co-funded model. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.

Considering the necessary conditions, as well as the experience of others in establishing this model, we would expect a joint venture or collaborative model to be a long-term aspiration of Council. We would envisage that it could take at least three to five years to have this model fully operational, depending on the level of priority and investment that it is given by ORC.

8.4 Prioritised Funding Model 3 – Investing in Large-Scale Environmental Initiatives via a new, ORC owned CCO⁴⁷

Introduction to the Model and Proposed Procurement Approach

We were asked to include this model in the prioritised list and provide further analysis of this option, specifically with the view to this model being a medium to long term option for Council to consider.

We have provided a thorough explanation of this model in Section 7.4.6 above and have outlined a robust explanation of the model, as well as the likely strengths, opportunities, weaknesses, and risks of implementing it. Further information and an example of this model currently in action is outlined in the case study of Biodiversity Hawkes Bay and Hawkes Bay Regional Council included in Appendix 16.

Pathway and Conditions to Model Implementation

It is difficult to provide definitive recommendations as to whether ORC should proceed with the development and use of this model to allocate 'large-scale' funding (or other environmental funding it currently allocates to landowners or community organisations).

The scope of this project has not gone far enough to allow us to provide advice to ORC on the appetite of ratepayers to set up a new entity or CCO for this purpose. Nor has it allowed us to (or were we asked to) provide the actual costs that the management and governance of such an entity would incur.

Should ORC seek to pursue this model as a suitable medium to long term option (that is, past the first two years of budgeted funding from 2027/28 FY onwards), then further work should be undertaken over the next two years to more clearly understand the feasibility of this approach. Conducting further analysis and feasibility should include the following:

- ORC undertakes or commissions a detailed feasibility and financial analysis to better understand the internal and administrative costs required for the CCO/Trust to meet its planning, management and auditing requirements under the LGA (2002). The findings of this should be included in the community consultation process to allow ratepayers to make their own value for money assessment of the model.

- ORC undertakes community consultation as required under the LGA (2002) to determine the level of support for the establishment of a CCO/Trust. For efficiency, this should be undertaken as part of the consultation process for the ORC Long Term Plan 2027-2037.
- Direct internal resources to work through the policy, financial and accountability needed to establish an entity (if approved). This will also need to determine the levels of internal resource that will be needed to establish as well as maintain the CCO/Trust, including the development of a constitution or Trust Deed, policy for the appointment and remuneration of Directors/Trustees, and the procurement or contracting policies that may be needed to oversee the allocation of funds to the new CCO/Trust. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.

8.5 Summary of Prioritised Model Alignment to Key Principles and Outcomes

Below is a summary of the key factors and variables for each of the three prioritised models. We have also assessed the likelihood of the model achieving the agreed key principles and outcomes of 'large-scale' environmental funding. Note that an assessment of 'likelihood' has been made based on our assumptions from the information we had available to prepare this report. A model's overall likelihood of success cannot be identified as this stage of the process and would be dependent on a number of factors that are not yet confirmed or that are unknown.

⁴⁷ A non-commercial making CCO, most likely a Trust

Figure 13: Summary of Prioritised Funding Model Features and Alignment to Key Principles and Large-Scale Fund Outcomes

Prioritised Funding Model – Structured Procurement aligned to CAP Implementation		
Procurement Approach	Single or multi-stage process via ROI, RFP, RFT administered by ORC.	
Governance of the Mode	ORC CEO & Councillors.	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">▪ ORC seeks interested organisations to complete a ROI which assessing their eligibility against a pre-set criterion. Offer is advertised via GETs.▪ Eligibility criteria developed and heavily weighted towards those groups able to meet the outcomes and priorities outlined in Catchment Action Plans or other applicable Council plans.▪ Interested organisations who meet the eligibility conditions, register their intent to apply.▪ RFP is released to those parties who have submitted and met the conditions of the ROI (either directly or via GETs).▪ RFPs reviewed against a weighted scoring matrix and preferred suppliers identified.▪ Contracts negotiated and agreed following approval from Council. Delivery monitored against contracts outlining key milestones and KPIs.	
Ongoing Management of the Model	Administration of the Fund and ongoing contract management undertaken by Environmental Implementation Team.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Likely
	Facilitation of Collaboration across the system	Likely
	Alignment to organisational strategy and strategic direction	Likely

Prioritised Funding Model – Joint Venture – Collaborative or Co-funded Agreement		
Procurement Approach	<ul style="list-style-type: none">▪ MoU or Shared Services Arrangement between ORC and collaboration partners.▪ Allocation of funds to the community by the collective or partnership could be via conditional grant or purchase.	
Governance of the Mode	<ul style="list-style-type: none">▪ ORC CEO & Councillors to ensure performance of the Joint Venture (as will the other Boards/Councils of the partner entities – for example, CEOs and Councillors of other local authorities if the joint venture included other councils).▪ Collective Governance Group established under the Shared Service or MoU to govern the 'large-scale' fund (which will have ORC representation, likely the CEO or delegated Executive Leader).	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">▪ Following the full establishment of the Joint Venture, funds would be allocated to the collective governance group under a Shared Service Arrangement.▪ The governance group of the Joint Venture would establish the systems and processes for allocating the funds. A Council staff member or Councillor would sit on the governance group.▪ Funds are allocated via the process established by the Joint Venture Governance Group.▪ The Joint Venture Governance Group (via the ORC representative) reports back to ORC against their contracted outputs and KPIs and ORC monitors their performance, ensuring ORC interests are maintained.▪ If over time, the funds allocated by each member changed, ORC's role and level of influence may reduce (if they were no longer the primary funder).	
Ongoing Management of the Model	<ul style="list-style-type: none">▪ Administration of the Fund is undertaken by the Collective Governance Group or Allocation Panel (which would include ORC senior management representation).▪ The overall management and monitoring of the Joint Venture would be undertaken by ORC CEO and may include Councillor representation to ensure effective ongoing monitoring of the collaboration.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Likely
	Facilitation of Collaboration across the system	Likely
	Alignment to organisational strategy and strategic direction	Possible

Prioritised Funding Model – Establish a new non-commercial CCO (Charitable Trust)		
Procurement Approach	<ul style="list-style-type: none">▪ Statement of Intent and Letter of Expectations set out by the CCO and agreed by ORC, plus additional purchase contract.▪ Allocation of the funds by the CCO to the community could be via a conditional grant or purchase.	
Governance of the Mode	<ul style="list-style-type: none">▪ ORC Councillors to ensure performance of the CCO.▪ Board of the CCO to govern the 'large-scale' fund.▪ ORC CEO likely to be appointed as a Trustee of the CCO (or a Councillor may be appointed, or delegated representative of the CEO) depending on the structure of the Deed or Constitution.	
Process to Allocate Funds to Project Delivery	<ul style="list-style-type: none">▪ Following the full establishment of the Entity, funds would be allocated to the CCO via a letter of expectation with the intended use of the funds outlined in their SOI or Deed.▪ The Trust would establish the systems and processes for allocating the funds. A Council staff member or Councillor may be an appointed Trustee on the CCO.▪ Funds are allocated via the process established by the CCO/Trust.▪ The CCO/Trust reports back to ORC against their contracted outputs and KPIs and ORC monitors their performance.	
Ongoing Management of the Model	<ul style="list-style-type: none">▪ Administration of the Fund is undertaken by the CCO.▪ Ongoing monitoring of the CCO and Fund performance (including administration and monitoring of performance against the Letter of Expectations) to be undertaken by senior ORC staff member within the Procurement or the Environmental Implementation Teams.	
Alignment to Key 'Large-Scale' Principles and Outcomes Sought	Intergenerational Impact	Possible
	Facilitation of Collaboration across the system	Possible
	Alignment to organisational strategy and strategic direction	Likely





Options & Recommended Approach

From our assessment of the prioritised models, we have outlined our recommended approach to the development and implementation of a 'large-scale' environmental fund. We believe this recommendation considers all strengths, opportunities, weaknesses and challenges and it most likely to support ORC with achieving its desired outcomes for this investment in the short to medium term (that is, over the next 3-5 years).

9.1 Recommended Approach

Recommended Procurement Approach

As a result of the extensive review and analysis we have undertaken to complete this project, we recommend that ORC implement Prioritised Option 1 - **Structured Purchasing – ROI, RFP or Direct Engagement, aligned to CAP Implementation.**

Please note that our recommended approach may not strictly align with the intent of the 'hybrid' model proposed by Council and recognises that it may not align to the Catchment Action Plan process as closely as was intended.

We propose that the CAP process should be a consideration of priority but should not in itself be the only consideration of how large-scale funds should be allocated.

In making this recommendation we have taken many factors into consideration, including:

- The ORC's current appetite for risk.
- The current strength of ORC's existing relationships and partnerships.
- The level of internal capacity and resources available to manage additional funding/contracting arrangements and processes.
- The maturity of the environmental sector locally and regionally to deliver initiatives or projects of landscape scale.
- The inconsistency of geographical spread of those ready, willing and able to deliver initiatives and projects at scale.
- The current state and stage of evolution of the Catchment Action Planning process and the limited availability of approved Action Plans and their alignment to mature legal entities that have a track record of large-scale delivery.
- The inequities that could be created regionally if the model for funding allocation is too heavily weighted towards an immature an evolving planning process (that is the Catchment Action Plans).

Recommended Governance Model

It is our recommendation that this model is governed by the CEO and Council as per appropriate procurement guidance and in line with existing Catchment Action Plan and procurement processes. The recommended approach does not deviate from standard or existing governance models in place. We encourage continued engagement at a governance level with ORC's partners, particularly to continue to engage with mana whenua during this process (via mana-to-mana).

Nothing in our recommended governance approach is different from the approach outlined in Section 8.2.

Recommended Fund Allocation Process

Nothing in our recommended fund allocation approach is different from the approach outlined in Section 8.2.

In addition to the fund allocation process we have recommended, we propose that the following key features and processes are also considered and implemented. These are included in our recommendations in Section 11 but are summarised below:

- Confirm timelines, eligibility criteria, process and internal resources, including the ways in which communities without CAPs will not be unreasonably disadvantaged from accessing 'large-scale' funding.
- Share information with mana whenua, stakeholders and communities to inform them of the outcome of this process.
- Retain a portion of the investment package to allow ORC to invest directly into education, evaluation or monitoring activities of initiatives.⁴⁸
- Retain a portion of the investment package as well as investing in funding and development opportunities to support organisational governance, management and funding sustainability.

Recommended Ongoing Management Model

We would like to stress that this recommended approach does not preclude ORC from prioritising the CAP process as a criterion to determine eligibility, nor does it preclude using large-scale funding as a way to incentivise communities to engage in the CAP process. Our recommendation is made on the basis that the CAP process alone should not be a key determining factor on how the funding is distributed and who what communities are eligible to receive investment.

Nothing in our recommended management approach is different from the approach outlined in Section 8.3.

Recommended Timescale for Use

This model can be implemented in the short term, with funds allocated by the end of this calendar year. To achieve this, investment in time and resource is needed to ensure that robust and detailed procurement documentation is completed and that timelines as required under the Government Procurement Rules can be adhered to.

Ensuring effective communications and support is provided to both to communities and community organisation and internally within ORC will be as vital as ensuring ongoing resources are in place to manage the contract delivery once funds are allocated. Once funds are allocated, it is expected that contracts would be in place for 18 months (of the 24 months available to account for the procurement process) beginning 1 January 2026 and ending on 30 June 2027.

Further details on the proposed procurement and implementation timings are outlined in Section 10 below.

We recommend that this model and the parameters that we propose for its use to guide the allocation and management of large-scale environmental funding be put in place for the first two to five years of the 'large-scale' fund (that is the current committed two years of funding, plus funding allocated under the next LTP cycle). Our rationale for this approach is outlined in Section 9.2 below and is further evidenced in our Recommendations section of this report.

9.2 Alternative Approaches

We are not currently recommending that the council looks to implement a Joint Venture or CCO/Trust model within the first three years of 'large-scale' investment due to the number of unknown factors and variables that exist. We cannot provide concrete and detailed information to determine with accuracy the level of risk involved in these models, the likelihood of their success, nor the extent of the possible financial and operational implications that ORC would incur through their development.

The future suitability and use of the all the prioritised models we looked at will be dependent on many factors, some of these are inside the control of the council (such as committing to undertake further feasibility and assessment of the models) and some the council will have less control over (such as the appetite of philanthropic investors to partner with council or the priorities of an incoming new Council).

Pathways and Conditions to Implementation of Joint Venture or Trust Models

It is our recommendation that ORC considers proceeding with implementing our recommended approach, but that work is undertaken over the next two years (once the first agreements are in place) to determine the suitability of the alternative models in the medium to long term.

In an ideal situation, the recommended approach would be implemented, with successful applicants receiving funds over two financial years, with a right of renewal put in place for a maximum of three years (to align with the next LTP cycle). This could see 'large-scale' environmental investment in place to the end of the 2029/30 financial year under the structured purchasing approach but would also provide sufficient time for ORC to not only undertake the further analysis required, but to undertake the work needed to establish a new and more sustainable structure, that could be operational from 1 July 2030.

The pathways to implement each of these models has been outlined in Sections 8.3 and 8.4 and are consolidated again below.

Investing in Large-Scale Environmental Initiatives via a Joint Venture or Co-Funding Arrangement

- Undertake detailed feasibility and financial analysis to better understand the internal and administrative costs required to govern, manage, and administer such an arrangement. This should provide an assessment of the costs and benefits to ORC and the community by having such a model. This may or may not be an initial first step and may need to be conducted once partners have been identified and indicated a high-level intention to partner or co-invest.
- Begin more formal conversations with potential statutory joint venture/co-funding partners to determine the scope of opportunity that is available. Initial discussions should be prioritised with mana whenua as well as the existing local authority partners in Otago.

⁴⁸ Note this assumes that the \$4 million available across two FYs is allocated under one procurement process, rather than \$2 million being allocated per annum. This would mean one funding round is held over the term that funding is currently available.

- Depending on the outcome of the recommendation above, begin more formal conversations with potential community or philanthropic joint venture/co-funding partners. Initial discussions should be prioritised with Otago Community Trust (as they have already expressed an interest), as well as other funders operating within ORC boundaries, particularly Central Lakes Trust, Whakatipu Community Foundation and the Community Trust of Southland.⁴⁹
- If this model cannot be progressed locally (due to insufficient interest or commitment), seek to begin discussions with other potential joint venture or co-funding partners outside of the Otago region. Possible entities to engage could include (but are not limited to) DOC, MfE, The Nature Conservancy, NZ Nature Fund and NEXT Foundation.
- Undertake consultation with community groups and organisations to obtain their views and feedback on the appropriateness of this model, noting that consulting on a developed idea (that has tangible partners interested) will be of greater benefit and importance than consulting on an aspirational idea (which is what this report has done).
- Direct internal resources to work through the policy, contracting, financial and accountability requirements needed to establish a structure under this model. This will also need to determine the levels of internal resource that will be needed to establish as well as maintain a joint venture or co-funded model. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.

Investing in Large-Scale Environmental Initiatives via a new, ORC owned CCO

- ORC undertakes or commissions a detailed feasibility and financial analysis to better understand the internal and administrative costs required for the CCO/Trust to meet its planning, management and auditing requirements under the LGA (2002). The findings of this should be included in the community consultation process to allow ratepayers to make their own value for money assessment of the model.
- ORC undertakes community consultation as required under the LGA (2002) to determine the level of support for the establishment of a CCO/Trust. For efficiency, this should be undertaken as part of the consultation process for the ORC Long Term Plan 2027-2037.
- Direct internal resources to work through the policy, financial and accountability needed to establish an entity (if approved). This will also need to determine the levels of internal resource that will be needed to establish as well as maintain the CCO/Trust, including the development of a constitution or Trust Deed, policy for the appointment and remuneration of Directors/Trustees, and the procurement or contracting policies that may be needed to oversee the allocation of funds to the new CCO/Trust. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.



⁴⁹ Note that we did not consult with CLT or CTOS through this process so are unaware of their level of interest to engage in further discussions at this point.



Proposed Plan and Timeline to Implementation

Using our recommended funding model and approach outlined in 9.1 above, we have provided a high-level timeline of key deliverables and dates that ORC will need to refine and confirm if large-scale funding is to be allocated before the end of Q2 of the financial year (that is 31 December 2025). Our recommended implementation plan including key activities and likely due dates is outlined below:

Phase 1 – Confirm the Recommended Approach and Obtain Required Signoffs	
Deliverable	Due Date
Gain endorsement of the recommended approach internally within ORC	30 April 2025
Report presented to Council for decision making	Wednesday 21 May 2025 (Council meeting)
Phase 2 – Confirming the Eligibility Criteria and Procurement Timeline	
Deliverable	Due Date
Develop and agree internally eligibility criteria and pre-procurement approach	6 June 2025
Report presented to Council for decision making	6 June 2025
Prepare and submit Council Report including eligibility criteria and detailed procurement plan	11 June 2025
Obtain sign off from Council on eligibility criteria and detailed procurement plan	Wednesday 25 June 2025 (Council meeting)

Phase 3 – Communication and Engagement with the Sector including mana whenua on agreed approach	
Deliverable	Due Date
Develop and agree a communications and engagement plan including key messages and timeframes for delivery	Throughout July and August 2025
Update mana whenua and local authority partners on the project and the outcomes of the review and report	
Update stakeholders who contributed to the project on the outcomes of the review and report	
Prepare and circulate key messages to ensure accurate messaging to those not directly involved in the consultation.	

Phase 4 – Procurement Planning and Implementation	
Deliverable	Due Date
Draft procurement documentation completed and ready for release to GETs (or other suitable procurement platform). At a minimum, documentation should include: <ul style="list-style-type: none">▪ RFP documentation▪ Draft contract▪ Evaluation criteria and scoring system	TBC
Procurement live on GETs	TBC
Hold a supplier briefing with interested organisations to provide clarity in requirements and answer questions	TBC
ROI process closes with those organisations meeting the ‘pre-procurement’ eligibility criteria submitting their intentions formally	TBC
Formal RFP closes with short listed applicants having the opportunity to present their proposal in an alternative format (such as presentation)	TBC
Responses are formally evaluated by an appointed evaluation panel that includes ORC management and other experts (but not elected members)	TBC
Due diligence is conducted	TBC
Report procurement outcomes and recommendations to Council for endorsement and/or approval	TBC
Negotiations and contracting commences with preferred suppliers	TBC
Contracts are awarded and unsuccessful organisations debriefed	TBC
Research and evaluation frameworks and parameters are established	TBC
Contracts are enacted and delivery commences, with contract monitoring taking place regularly between ORC and organisations	TBC
Investigations into the feasibility and validity of other preferred funding model options is undertaken.	1 January 2026 to 30 June 2027

▪



Recommendations

As part of our scope of work, we were asked to provide ORC with a range of recommendations that would support the successful implementation of additional funding to support 'large-scale' environmental initiatives and projects. The funding is currently approved under the LTP as \$2 million per annum for the 2025/26 and 2026/27 financial years.

These recommendations have been identified and discussed through various parts of our report, with the contextual relevance of them outlined in the discussions. These recommendations are consolidated into this section which includes recommendations in relation to the project overall, as well as recommendations for ORC to consider as part of the recommended model and recommended alternative long-term options.

11.1 Project Recommendations

Regardless of the model chosen to implement and allocate 'large-scale' funding, the breadth and depth of the impact and outcome that this investment can achieve will be contingent on ORC considering and implementing a number of the following recommendations.

Eligibility Criteria and Definition Related Recommendations

- A detailed eligibility criteria to allow community organisations to assess whether they align to ORC's intended outcomes and expectations is needed to support implementation of the fund. At a minimum, we propose that this criterion should include how organisations will demonstrate the following:
 - Achieve alignment to intergenerational aspirations of mana whenua, with a demonstrated level of support obtained for the initiative from mana whenua/papatipu rūnaka.
 - Directly contributes towards achieving priorities identified by ORC and provide a line of sight to those priorities outlined in documents such as Catchment Action Plans.
 - Initiatives or projects sufficiently meet the intent of 'large-scale' from an ecological perspective (that is, a multifaceted approach to enhancing the overall biodiversity of an area, rather than focusing on one element such as invasive mammal control).
 - Investment allows for an increase in scale and/or impact of those projects and initiatives that are already in place (rather than funding new projects or ideas), that are already contributing towards environmental outcomes and that demonstrate value for money.
 - They are a legal entity, able to demonstrate they have capacity, capability, and stability (governance and financial for example) to deliver 'large-scale' initiatives.
 - Initiatives that are community-led with a high degree of collaboration at all levels of the system (including local authorities, mana whenua, landowners and other stakeholders).
 - The extent to which they can act as an umbrella entity and/or collectives of organisations (this should be encouraged but only where appropriate governance and management structures are in place to effectively deliver on requirements).
 - Their commitment to work together in partnership (with ORC and others), to further enhancing collaboration, community activation and sustainable funding and leverage opportunities beyond the initially agreed investment term.
- Continue to engage and consult with mana whenua through the next phases of fund development and implementation.
- Determine and agree the size and scale of investment that ORC deems reasonable and appropriate in relation to this fund (for example, is a \$100,000 or a \$500,000 investment considered reasonable) and the overall risk appetite of Council.

General Procurement and Funding Recommendations

- Agree and communicate internally and externally, a clear implementation plan that sets out reasonable timeframes for the process to procure, review, and award funding, allowing communities and organisations to plan and upscale where needed. This will ensure that communities and providers are not set up to fail.
- Following the procurement process, enter into multi-year funding agreements with organisations that aligns with the budget decisions under the LTP (that is \$4 million over two financial years), noting that this is likely to only be around 18 months under the current approved funding.

- ORC should consider including a stop/go mechanism or right of renewal clause in funding agreements for successful organisations (up to a maximum of five years would be recommended – that is 2+3 years) to align with future LTP cycles. This would reduce the procurement administration required to administer a fund and provide reasonable timeframes for initiatives to achieve 'large-scale' impact (outcomes cannot be achieved in 18 months).
- The investment and permitted use of the funds allows for all types of costs to be met that are deemed reasonable and relevant including staff and personnel, administration costs, and costs to support education, evaluation, and monitoring of deliverables.
- Within the parameters of the fund, ORC allows for the use of some funds to support and enhance organisational capability (management and governance) to strengthen the overall system, as well as to support education, and evaluation and monitoring initiatives.

Specific Recommendations in Relation to Each Prioritised Funding Model

We have outlined a number of recommendations that ORC could consider across the three prioritised funding models. The outcomes from our recommendations under each model will help inform what the most appropriate long-term model to govern large-scale environmental investment will look like for ORC (for example, the outcome of community consultation in relation to establishing a CCO or Trust will contribute towards whether this model is likely in the long-term).

These recommendations were outlined in Sections 8.2 – 8.4 and are summarised again below:

Structured Procurement Aligned to CAP Implementation

- Determine a process for equitable distribution of funding to those catchments that still will not have a CAP in place by 2028/29 or accelerate the timeline for development of CAP's.
- Ensure that all elected members as well as those staff working directly with communities in the development and implementation of CAPs are excluded from procurement evaluation and decision-making to manage perceived or actual conflicts of interest.
- Undertake further analysis and feasibility to the ongoing use of the model to ensure an equitable process for distributing 'large-scale' funds to those communities/catchments that do not or will not have an approved CAP in place by 2028/29.
- Agree a comprehensive assessment and prioritisation criteria to allow for objective investment decisions to be made as to the use of 'large-scale' funding. This recognises that as more CAPs are completed, not all activities within a CAP, and not all CAPs will be able to be funded.
- Consider the long-term allocation criteria of this funding model and the reach and impact that can be achieved if it becomes diluted across multiple CAPs.

Joint Venture of Co-Funding Arrangement

- Undertake detailed feasibility and financial analysis to better understand the internal and administrative costs required to govern, manage, and administer such an arrangement. This should provide an assessment of the costs and benefits to ORC and the community by having such a model. This may or may not be an initial first step and may need to be conducted once partners have been identified and indicated a high-level intention to partner or co-invest.

- Begin more formal conversations with potential statutory joint venture/co-funding partners to determine the scope of opportunity that is available. Initial discussions should be prioritised with mana whenua as well as the existing local authority partners in Otago.
- Depending on the outcome of the recommendation above, begin more formal conversations with potential community or philanthropic joint venture/co-funding partners. Initial discussions should be prioritised with Otago Community Trust (as they have already expressed an interest), as well as other funders operating within ORC boundaries, particularly Central Lakes Trust, Whakatipu Community Foundation and the Community Trust of Southland.⁵⁰
- If this model cannot be progressed locally (due to insufficient interest or commitment), seek to begin discussions with other potential joint venture or co-funding partners outside of the Otago region. Possible entities to engage could include (but are not limited to) DOC, MfE, The Nature Conservancy, NZ Nature Fund and NEXT Foundation.
- Direct internal resources to work through the policy, contracting, financial and accountability requirements needed to establish a structure under this model. This will also need to determine the levels of internal resource that will be needed to establish as well as maintain a joint venture or co-funded model. the level of internal resources (people and time) needed to establish and administer such an arrangement. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.

Establish a Non-Commercial CCO such as a Trust

- ORC undertakes or commissions a detailed feasibility and financial analysis to better understand the internal and administrative costs required for the CCO/Trust to meet its planning, management and auditing requirements under the LGA (2002). The findings of this should be included in the community consultation process to allow ratepayers to make their own value for money assessment of the model.
- ORC undertakes community consultation as required under the LGA (2002) to determine the level of support for the establishment of a CCO/Trust. For efficiency, this should be undertaken as part of the consultation process for the ORC Long Term Plan 2027-2037.
- Direct internal resources to work through the policy, financial and accountability needed to establish an entity (if approved). This will also need to determine the levels of internal resource that will be needed to establish as well as maintain the CCO/Trust, including the development of a constitution or Trust Deed, policy for the appointment and remuneration of Directors/Trustees, and the procurement or contracting policies that may be needed to oversee the allocation of funds to the new CCO/Trust. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.

⁵⁰ Note that we did not consult with CLT or CTOS through this process so are unaware of their level of interest to engage in further discussions at this point.



Acknowledgements

Frequency would like to acknowledge the input of the following people who have voluntarily and passionately contributed their time, experience and insight during this project.

Thank you to the staff across ORC, and in particular the Environmental Implementation Team who have contributed to this work, providing the project team with important background information, introductions and connections to stakeholders, and who have ensured the factual and contextual validity of our early work and assumptions. The input from senior leaders and elected members, both from Mana-to-Mana and wider council has been valuable and has provided good governance oversight to this project.

The local government structures across Otago are complex, with the region being home to a regional council, and five local authorities, ranging in size from Dunedin City to Clutha District. Waitaki District has the added complexity of cover regional council boundaries of both ORC and Environment Canterbury. During this project, staff across all Otago local authorities made themselves available to answer questions, share their learnings and discuss opportunities to biodiversity outcomes across the region. Thank you to the staff at Waitaki District Council, Dunedin City Council, Clutha District Council, Central Otago District Council, and Queenstown Lakes District Council for your input into this project.

We have engaged with many community organisations stakeholders from across the region as well as many outside of Otago. These discussions have been constructive and the desire for open and collaborative relationships, evidence based and best practice investment decisions and strengthening of relationships and partnerships is evident. We would like

to acknowledge the input of Predator Free Dunedin, the QEII National Trust, Wai Wānaka, Southern Lakes Sanctuary Trust, Otago Catchment Communities Trust, Whakatipu Wilding Conifer Trust, Biodiversity Hawkes Bay, Wild for Taranaki Trust and Kotahitanga mō te Taiao (KMTT).

The input provided by other local and regional authorities around the motu was invaluable and we would like to acknowledge their openness to share their successes, failures and lessons learned from their own experiences with 'large-scale' environmental funding and their use of a range of procurement and funding approaches. We would like to thank Environment Canterbury, Taranaki Regional Council, Hawke's Bay Regional Council, Waikato Regional Council and Auckland Council for sharing their experiences and allowing their approaches to be showcased as case studies in this report.

Not all learnings came from within the environment sector or from within local government, and we sought out examples from different sectors and organisations to inform the content of the Councillor Workshops and this report. We acknowledge and thank staff from Sport New Zealand and the Department of Conservation, Otago Community Trust and Whakatipu Community Foundation for contributing to this project.

Lastly, we would like to acknowledge the volunteer governors, managers and staff who dedicate their time to supporting the delivery of environmental initiatives in their communities, and who gave so generously to this project. These discussions provided important contextual information and valuable insights and lessons learned that cannot be understood from a strategy document or evaluation report. We met with a range of regional and national environmental action groups

13.0

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77

Council Meeting - 25 June 2025

655

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14.0

Appendices

Please refer to our second and accompanying document titled Environmental Funding Model Review Appendices and Supporting Documents for the information referred to in this Report.

Creating a thriving Aotearoa
for future generations

Development and Implementation of ‘Large-Scale’ Environmental Funding

Appendices

May 2025 | Frequency NZ Ltd



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Contents

Appendix 1: Waikato Regional Council – Natural Heritage Fund Application Form

Appendix 2: Detailed Literature Review

Appendix 3: ORC Councillor Workshop 1 – Presentation

Appendix 4: ORC Councillor Workshop 1 – Pre-reading and Survey

Appendix 5: ORC Councillor Workshop 2 – Pre-reading

Appendix 6: ORC Councillor Workshop 2 – Presentation

Appendix 7: Partner and Stakeholder Consultation Participants

Appendix 8: Letter to Council Stakeholders

Appendix 9: Letter to Community Stakeholders

Appendix 10: Letter to Rūnaka Partners

Appendix 1: Waikato Regional Council – Natural Heritage Fund Application Form

NHF Application Form 2024

Form Preview

Introduction

The Natural Heritage Fund (NHF) is designed to support community led, collaborative projects that have long term, landscape scale, intergenerational ecological benefits, including assisting in securing public assets and public access.

Eligibility Checklist

The Natural Heritage Partnership Programme Funding Policy outlines what the Natural Heritage Fund (NHF) can provide funding for. Applicants must be able to demonstrate they meet the eligibility checklist below. Only initiatives that satisfy **all six** eligibility checklist items can continue to the application form. For each section, please tick all that are applicable as a self check of your eligibility. Note, this will be verified through the application and assessment process by Council.

1. Landscape scale

*Landscape scale can be defined in the following ways. Your application must provide evidence of **one or more** of the following, as a guide. Tick all that apply.*

- ☐ Scale: initiatives that are larger than 400 hectares
- ☐ Ecological Connectivity: through the development and enhancement of an ecological corridor or ecological stepping stones.
- ☐ Defined / Defendable Area: a naturally defined ecological region such as a catchment boundary.
- ☐ Ecological Variation: incorporating multiple ecosystems e.g. a dune, wetland and terrestrial forest.
- ☐ Connecting community effort: incorporating multiple groups and/or landowners to achieve landscape scale biodiversity outcomes and a collective approach to delivering these outcomes (e.g. a hub or collective).

2. Community led and collaborative

*Must be led by the community and must incorporate collaboration at multiple levels of your organisation. Community is defined as any stakeholders within the area where your work will be undertaken. You must be able to demonstrate **all** of the following:*

- ☐ Community are part of the governance and strategic planning.
- ☐ Ongoing volunteer input.
- ☐ Mana whenua led or ongoing cultural and mana whenua collaboration, support or leadership (see point 3 below for more detail).
- ☐ Relationships with other relevant stakeholders. Examples may include local and central government, technical experts, funders, businesses, or school communities.

3. Involvement / support of mana whenua

*You must provide evidence of **one or more** of the following. Tick all that apply.*

NHF Application Form 2024

Form Preview

- ☐ Mana whenua led initiative, including incorporation of mātauranga Māori into planning and delivery.
- ☐ Active mana whenua involvement in governance e.g. trustee / board members.
- ☐ Mana whenua involved in the delivery.
- ☐ Letter of support from mana whenua confirming alignment with iwi aspirations.
- ☐ Cultural framework, plan or guiding document developed and available.

4. Long term, inter-generational benefits

*Your initiative must have long term inter-generational biodiversity benefits by demonstrating **one or more** of the following. Tick all that apply.*

- ☐ If you are an established organisation, you must be able to demonstrate a history of success with biodiversity outcomes, and a clear plan for the future which incorporates succession planning.
- ☐ If you are a new organisation you must have a clear plan for the future and demonstrate you will have long term biodiversity outcomes.
- ☐ The initiative has a range of people involved from diverse backgrounds, cultures, age groups and with a range of expertise that will support ongoing, long-term success.

5. Demonstrate co-funding

*The initiative does not rely solely on funding from Waikato Regional Council and must provide evidence of **one or more** of the following. Tick all that apply.*

- ☐ Confirmed funding from other entities.
- ☐ Significant in-kind volunteer support.
- ☐ Funding through a business model (e.g. tourism, providing services to others).

6. Landowner support and permission

If applicable, you must be able to provide evidence of the following:

- ☐ Letter of support or permission from landowners (note complete signed landowner permission will be required before funding can be granted to groups/organisations).
- ☐ Not applicable (e.g. you are the sole landowner, or you are operating as a community hub).

Before you apply

You must complete all required sections of the application form. Failure to provide the necessary information will impact the success of your application.

If you have any questions about your application please contact **Andrew Thomas** on **0800 800 401** or email nhf@waikatoregion.govt.nz.

Applicant Information

* indicates a required field

Applicant Name *

Organisation Name

NHF Application Form 2024

Form Preview

Must be the full legal name of your organisation.

Applicant Type *

- ☐ Incorporated Society
- ☐ Iwi/hapū
- ☐ Charitable Trust
- ☐ Limited Liability Company
- ☐ Education Institution
- ☐ Other

Please select your legal entity status. Only one choice may be selected.

Applicant NZBN

The NZBN provided will be used to look up the following information. Click Lookup above to check that you have entered the NZBN correctly.

New Zealand Companies Register Information	
NZBN	
Entity Name	
Registration Date	
Entity Status	
Entity Type	
Registered Address	
Office Address	

Must be formatted correctly.
If you don't know your NZBN number you can find it [here](#).

Applicant Contact Details

Primary Address *

Address

Postal Address *

Address

If your address is a PO Box or Private Bag, click on "Can't find your address?" to enter it manually.

Phone Number *

Email *

Must be an email address.

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Form Preview

Website

Must be a URL.

Project Contact

Project Contact Person *

Title First Name Last Name

The primary person responsible for this project

Project Contact Position

*

Role within the organisation.

Project Contact Phone Number *

Project Contact Email *

Must be an email address.

Organisation Details

Please provide a brief description of your organisation *

Word count:

Must be no more than 100 words.

This can include a brief summary of your structure, how long your organisation has been operating and any over-arching objectives of your group.

How many staff does the organisation have?

Full time

Part time

Volunteers

Financial Information

Is your organisation GST registered *

- ☐ Yes
☐ No

Please enter your GST number *

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Must be at least 8 characters.

Bank Account Details

Bank Account *

Account Name

Account Number

Bank account must be in the name of the applicant organisation. Please note: Council does not pay to accounts belonging to individuals.

Please attach proof of bank account *

Attach a file:

Bank account proof can be any of the following:

- Pre-printed bank deposit slip
- Bank statement showing account name and number (dated within the last year)
- Certified bank details - stamped and signed by bank teller (dated within the last year)

Internet banking screenshots are **not** accepted.

Project Details

* indicates a required field

Project title *

Must be no more than 10 words.

Short project description *

Word count:

Must be no more than 200 words.

Please provide a short description of the specific project for which you are applying for funding.

How does this specific project fit within the context of your organisation's wider programme of work?

Word count:

Must be no more than 150 words.

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Form Preview

What are the expected outcomes of this project? Select all that apply. *

- ☐ Enhanced existing native habitat
- ☐ Improved biodiversity through creating habitat
- ☐ Improved biodiversity by controlling pest animals
- ☐ Improved biodiversity through controlling pest plants
- ☐ Improved native biodiversity
- ☐ Increased community participation
- ☐ Increased community engagement in biodiversity
- ☐ Other:

What activities do you have planned as part of the specific project and how do these contribute towards achieving the project’s expected outcomes?

Example 1: Activity = baiting pulse twice a year; undertaken by = volunteers; outcome = improved biodiversity by controlling pest animals; monitoring = RTI twice a year.

Example 2: Activity = quarterly workshops; undertaken by = paid staff; outcome = increased community participation; monitoring = number of attendees.

Activity	Undertaken by	Which of your expected outcomes does this activity contribute towards?	Monitoring metric
e.g. Fortnightly servicing of rat and mustelid traps	Volunteer, paid staff, contractor	Select from the dropdown list below.	e.g. RTI’s Tracking tunnels biannually

Location details

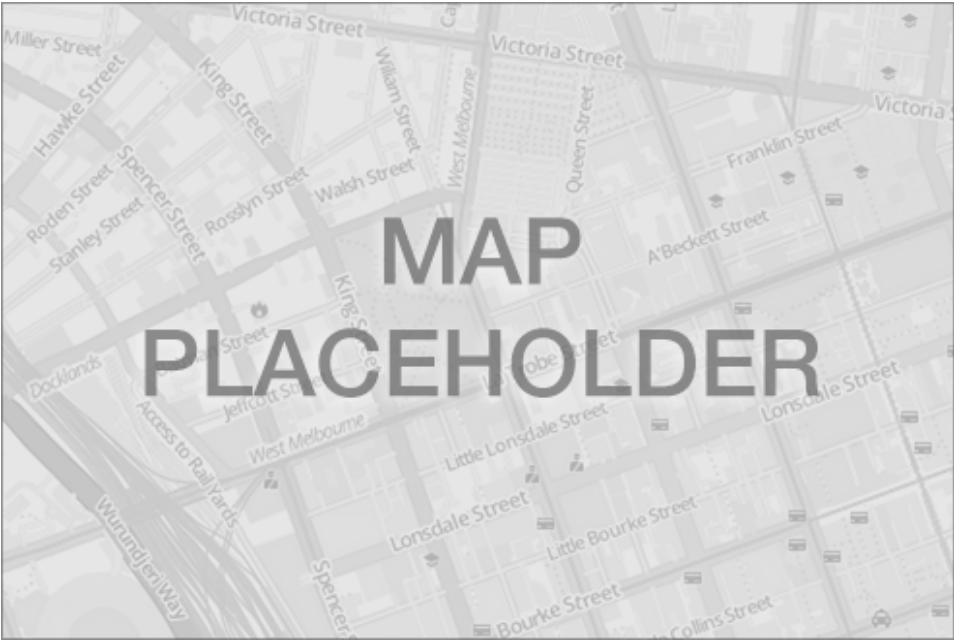
Start typing an address into the field below and select from the list. Your location will be displayed on the map. You can re-position the pin on the map if required. Coordinates of the location you have selected will be displayed at the bottom of the map.

Address

Address

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Form Preview



The map above is designed to give a general indication of the project location. A detailed map showing the extent of the project area must be attached below.

Within which district/city council area is your project located? *

- | | | |
|---|--|--|
| <input type="checkbox"/> Hamilton City | <input type="checkbox"/> Rotorua | <input type="checkbox"/> Waikato |
| <input type="checkbox"/> Hauraki | <input type="checkbox"/> South Waikato | <input type="checkbox"/> Waipa |
| <input type="checkbox"/> Otorohanga | <input type="checkbox"/> Taupō | <input type="checkbox"/> Waitomo |
| <input type="checkbox"/> Matamata-Piako | <input type="checkbox"/> Thames-Coromandel | <input type="checkbox"/> Region-wide (all districts) |

Please select all options that apply to your project.

Total size of project area in hectares *

Enter a number only. Do not enter units.

Please attach a detailed map showing the scope of the project for which you are applying for funding *

Attach a file:

Include traps, bait stations and other infrastructure either in place or proposed.

Climate change

Describe how your project will increase resilience to climate change impacts and/or contribute to positive carbon sequestration. *

Word count:

Must be no more than 100 words.

Please refer to Council's [climate change webpage](#) for more information.

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Form Preview

Assessment Criteria

* indicates a required field

Fit with Council’s regional outcomes, strategic priorities, and policies

How does your project fit with Council’s regional outcomes, strategic priorities, and policies? *

Word count:

Must be no more than 150 words.

Refer to [community outcomes](#), [strategic priorities](#), and policies such as [NHPP policy](#).

Environmental enhancement

How the project will directly promote, enhance or protect the Waikato region’s environment, with a focus on improved ecological and biodiversity outcomes.

How will your project be working towards environmental enhancement and/or protection? *

Word count:

Must be no more than 150 words.

Identify why this project is needed in this part of the region.

What are the existing ecological values or significance of the project area? *

Word count:

Must be no more than 150 words.

Does the project area include the protection of threatened ecosystems, or threatened/at-risk species, or habitats that are important to protect in the region/nationally?

How do you plan to monitor biodiversity outcomes of this project? *

Word count:

Must be no more than 200 words.

For example, the use of tracking tunnels before and after a baiting pulse, five-minute bird counts, photo points. TrapNZ (or equivalent) must be used for any predator control programmes.

Please describe how your project is working at landscape-scale. *

Word count:

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Form Preview

Must be no more than 150 words.
Please refer to Eligibility Checklist 1 for guidance.

Please describe how you plan to ensure there are long term, intergenerational benefits to your project. *

Word count:
Must be no more than 150 words.
Please refer to Eligibility Checklist 4 for guidance.

Community participation and awareness

How the project involves iwi Māori, the wider community and increases public awareness of environmental issues. What is the level of mana whenua and community support for the project.

What level of volunteer involvement do you have in your project? *

Word count:
Must be no more than 200 words.
What role will volunteers play in this specific project? For example, how many volunteers will be involved and approximately how many hours will they spend on this project?

How are the wider community involved, including how this project will strengthen public awareness of environmental issues? *

Word count:
Must be no more than 150 words.
For example, any advocacy your organisation does within the wider community such as workshop events, social media, or work involving schools. Please also describe how they are a part of your governance and strategic planning.

Collaboration and partnerships

How have you explored and developed opportunities for collaboration and partnership with others, including any co-funding and support from other parties.

Explain how you are collaborating with other community groups and/or stakeholders *

Word count:
Must be no more than 200 words.
This can include working in conjunction with neighbouring community conservation groups, sharing knowledge with other groups, working with local councils and/or DOC.

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Form Preview

Landowner Consent

Does your project include work on: *

- ☐ DOC land
- ☐ Private land
- ☐ LINZ land
- ☐ District Council
- ☐ Iwi land
- ☐ Multiple Māori owned land
- ☐ Not applicable (e.g. community hub)

Please select all that apply.

How many landowners are within your project area? *

Must be a number.

How many landowners do you have signed permissions from? How many landowners do you have only verbal support from? Explain how you intend to obtain signed permission from all of the necessary landowners. *

Word count:

Must be no more than 100 words.

Please note signed landowner permission will be required before funding can be granted.

Please attach letter(s) of support from project partners or relevant stakeholders

Attach a file:

Note: letters of support from Waikato Regional Council staff cannot be accepted.

Viability

The likelihood of the projects success and the applicants capability to deliver the outcomes of the project.

What plans do you have in place to ensure that your project is successful? *

Word count:

Must be no more than 200 words.

How have you ensured that your organisation has the capacity and capability to complete your project?

Mana whenua

How does the project involve iwi Māori including their cultural values, interests and associations, the effect on Māori historic heritage or the relationship of Māori and their

NHF Application Form 2024

Form Preview

culture and traditions with their ancestral lands, water, sites, wāhi tapu and other taonga including fauna and flora.

Please describe how mana whenua are involved in, or supporting, your project. *

Word count:

Must be no more than 150 words.

Provide any examples of how you are ensuring iwi aspirations are central to your project, ongoing collaboration and shared decision making with mana whenua. Please refer to Eligibility Checklist 3 for guidance.

Please describe how Māori values, culture, and mātauranga Māori will guide your project *

Word count:

Must be no more than 200 words.

Provide any specific examples of how Te Ao Māori, mātauranga Māori, and tikanga will be integrated into the project. Include any strategies for protecting cultural and spiritual connections to the land, water, and biodiversity.

Please attach any relevant letters of support from local mana whenua.

Attach a file:

Supporting Documentation

You can include up to four supporting documents. These may include management plans, strategic documents etc. These supporting documents may not be reviewed by Council in their entirety. Please include any key information contained in supporting documents in the application form to ensure it is considered in the assessment process.

Please attach any relevant supporting documents

Attach a file:

A maximum of 4 files may be attached.

Budget

*** indicates a required field**

Please enter all budget information in **GST exclusive** amounts.

The total amount requested must be greater than \$40,000 and can be for up to four years.

Sub-totals and totals are automatically calculated at the end of this section.

How many years are you requesting funding for this project? *

NHF Application Form 2024

Form Preview

☐ 1 ☐ 2 ☐ 3 ☐ 4
SmartyGrants will bring up the correct number of tables for the funds requested. Labour and Materials will form different tables.

Labour Costs

Please enter all budget information in **GST exclusive** amounts.

If you are requesting funding of labour costs for a role within your organisation, please provide a role description below.

Include all volunteer, in-kind, or self funded labour contributions from your organisation (volunteer labour should be costed at \$23.15 per hour).

Role Description(s)

Attach a file:

Labour Costs - Year 1

Labour type	Supplier	Project Activity	No. hours	Hourly rate (\$)	Labour Cost (\$)	NHF funding requested (\$)
Please select one.	Include name if known.	Identify the project activities to be completed by this resource.	Must be a number only	Must be a dollar amount.	Automatically calculated	Must be a dollar amount.
Contractor Paid staff Volunteer						

Labour Costs - Year 2

Labour type	Supplier	Project Activity	No. hours	Hourly rate (\$)	Labour cost (\$)	NHF Funding requested (\$)
Please select one.	Include name if known.	Identify the project activities to be completed by this resource.	Must be a number only	Must be a dollar amount.	Automatically calculated	Must be a dollar amount.
				\$	\$	\$
				\$	\$	\$

NHF Application Form 2024

Form Preview

				\$	\$	\$
--	--	--	--	----	----	----

Labour Costs - Year 3

Labour type	Supplier	Project Activity	No. hours	Hourly rate (\$)	Labour Cost (\$)	NHF Funding requested (\$)
Please select one.	Include name if known.	Identify the project activities to be completed by this resource.	Must be a number only	Must be a dollar amount.	Automatically calculated.	Must be a dollar amount.

Labour Costs - Year 4

Labour type	Supplier	Project Activity	No. hours	Hourly rate (\$)	Labour Cost (\$)	NHF Funding requested (\$)
Please select one.	Include name if known.	Identify the project activities to be completed by this resource.	Must be a number only	Must be a dollar amount.	Automatically calculated	Must be a dollar amount.

Materials costs

Please provide estimates of the funds you would be requesting from the NHF to complete your project.

Please enter all budget information in **GST exclusive** amounts.

Materials Costs - Year 1

Description of materials	Estimated Quantity	Total Cost (\$)	NHF Funding requested (\$)
e.g. traps including consumables	Must be a number only	Must be a dollar amount.	Must be a dollar amount.

NHF Application Form 2024

Form Preview

			\$
			\$
			\$

Materials Costs - Year 2

Description of materials	Estimated Quantity	Total Cost (\$)	NHF Funding Requested (\$)
e.g. traps including consumables	Must be a number only.	Must be a dollar amount.	Must be a dollar amount.
		\$	\$
		\$	\$
		\$	\$

Materials Costs - Year 3

Description of materials	Estimated Quantity	Total Cost (\$)	NHF Funding requested (\$)
e.g. traps including consumables	Must be a number only	Must be a dollar amount.	Must be a dollar amount.

Materials Costs - Year 4

Description of materials	Estimated Quantity	Total Cost (\$)	NHF Funding requested (\$)
e.g. traps including consumables	Must be a number only	Must be a dollar amount.	Must be a dollar amount.

Funding contributions from other organisations

Please describe any other funding or in-kind support you have already received that will contribute towards this project or any other funding you are in the process of securing.

For example, traps that have been donated to your group/organisation, volunteer hours (at \$23.15 per hour), monetary donations from fundraising events, named funds that you are also applying to. The amounts can be estimated.

Organisation	Product or service	Amount (\$)	Funding status
Name of the group/organisation	Description of the contribution (e.g. monetary funding, volunteer hours, or materials)	Must be a dollar amount.	

NHF Application Form 2024

Form Preview

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Budget Totals

Below are the sub-totals and totals for your budget. Please check carefully to ensure they are correct.

These fields are automatically calculated. If any information is not totalling correctly, please adjust your budget details above.

Sub-totals Year 1

Total costs	Labour requested	Materials requested	Total requested
	\$		\$

Sub-totals Year 2

Total costs	Labour requested	Materials requested	Total requested
\$	\$	\$	\$

Sub-totals Year 3

Total costs	Labour requested	Materials requested	Total requested

Sub-totals Year 4

Total costs	Labour requested	Materials requested	Total requested

Totals

Total project costs *	Total NHF funding requested *	Percentage NHF contribution *	Total other contributions
Automatically calculated.		% of total project cost. Automatically calculated.	Automatically calculated

Declaration

* indicates a required field

Terms and Conditions

- Waikato Regional Council may discuss the application with other persons or organisations as part of the evaluation process.

NHF Application Form 2024

Form Preview

- Waikato Regional Council will determine funding allocations and their decisions will be final.
- Approval may be subject to funding conditions.
- Successful applicants will be required to sign a Funding Agreement with Waikato Regional Council outlining how funds will be spent.
- Projects must be started within six months of funds being paid. Should the project not proceed within six months of payment, funding approval will become null and void (with funds being returned to Council) unless other provisions are arranged between the applicant and the Council.
- A successful application does not guarantee funding in subsequent NHF funding rounds.
- Biosecurity legislation and best practice guidelines are expected to be a key consideration of any project receiving funding as part of Council’s funding programmes, e.g. kauri protection.
- If your application is successful, you will be required to have a discussion with Waikato Regional Council to outline overlapping duties under the Health and Safety at Work Act 2015.

Privacy Statement

Any information you provide with your application is official information. Your information is held and administered by the Waikato Regional Council in accordance with the Local Government Official Information and Meetings Act 1987 and the Privacy Act 1993. This means that your information may be disclosed to other people who request it in accordance with the terms of these Acts. It is therefore important you let us know if your application includes trade secrets, commercially sensitive materials or any other information you consider should not be disclosed. Under the Privacy Act 1993 you have right of access to personal information held by the Waikato Regional Council.

In making this declaration I declare that:

- 1.I am authorised to do so, and to the best of my knowledge the information contained in this application is true and correct.
- 2.I have read and agree to the Terms and Conditions and Privacy Statement above.

I agree *

☐ Yes

Name *

Title First Name Last Name

Phone Number *

Must be a New Zealand phone number.

Email *

Must be an email address.

Date *

Must be a date.

NHF Application Form 2024

Form Preview

When your application is submitted, Smartygrants will email you to confirm receipt. If you do not receive confirmation please check your 'spam' filter.

Appendix 2: Detailed Literature Review

Phase Two of this project required us to conduct a comprehensive desktop review of literature from New Zealand and overseas to identify the trends and challenges in community environmental funding and stewardship that existed. This was to not only investigate and understand the most effective environmental initiatives being led and delivered but to also understand what the research and evidence says about the most effective grant making and funding approaches available to ORC to examine and seek to adopt.

To inform our approach and recommendations, we sought out, reviewed and considered a large body of evidence-informed or evidence-based data and research that included academic and journal articles, programme and project evaluations, independent reviews and investigations as well as several legislative and regulatory documents, both from New Zealand and internationally.

This section of the report focuses on the key themes and outcomes from our review of the literature that we sought against the following parameters:

- The effectiveness of contestable (competitive) vs directed (non-competitive) funding models.
- The effectiveness of funding project delivery vs funding system enhancement, capability building and collaborative activities.
- The effectiveness of investing in ‘umbrella’ entities to achieve efficiencies and outcomes vs repetitive funding into singular entities.
- The evidence linking the length of time investment with the likely achievement of outcomes.
- Evidence indicating the level/value of funding required to warrant the achievement of outcomes or impacts.
- Evidence on the effectiveness of joint funding arrangements either between public agencies or between the public sector and the community and/or charity sectors.
- Existing examples of definitions of large-scale and landscape scale that may be applicable in the ORC context.¹
- Examples of funding models, programmes or initiatives that have been successful in sustaining long-term delivery, attracting and leveraging additional funding or attracting significant third-party investment (both within and outside of the environment sector).

Legislative and regulatory documents as well as key research and evaluations into grant making activities have been used to inform our assessment and analysis of each funding model outlined in Section 7 and are not necessarily referred to in this section of the report. A full list of the references used in the development of this project are outlined in Section 13 of this report.

The narrative in this section should be read in conjunction with the key themes and feedback we obtained during the partner and stakeholder consultation process (which is outlined in Section 5), as together, these sections identify and outline consistent themes and challenges facing the environmental sector towards achieving sustainable and impactful organisational and environmental outcomes into the future.

In addition to the content in this section of the report, specific real-world examples of a range of funding models in use is also included in the Appendices document which accompanies this report which provides six relevant New Zealand examples that further support the literature.

The seven consistent themes we identified from the literature include:

2.1 The Community Sector in New Zealand is Economically and Strategically Significant but the Funding System is Fragmented

In 2018, the New Zealand philanthropic sector, including charities, and not-for-profits contributed approximately \$8.1 billion (or 2.8%) to New Zealand’s GDP, which highlights the economic and societal importance of the sector and the contribution that volunteers make to our overall economy. New Zealand has around 28,000 registered charities, roughly 24,000 registered Incorporated Societies (of which around 7,000 of these are also registered charities). The sector represents around 5% of the country’s paid workforce with around 145,000 staff, who are supported by over 217,000 volunteers across multiple sectors.²

The community sector has become large and potentially unsustainable, as there is now one registered charity for every 183 people in this country which is one of the highest ratios internationally (compared with 1:221 people in the United States; 1:460 people in Australia and 1:396 people in the United Kingdom). As the number of community organisations has grown (noting that this includes but not limited to the environment or conservation sector), central and local government funding has reduced in challenging economic conditions. Funding available through other traditional sources such as Class Four Gaming Funding (funding that comes from gambling revenue such as Pokie Machines or Lotteries) has reduced, (particularly post-COVID-19 as investment returns dropped), premises have closed and/or where regulators have moved to proactively reduce the number of machines or new licenses granted (in a bid to improve social outcomes).

The philanthropic sector in New Zealand has remained relatively stagnant with charitable giving increasing by only 1.4% annually over the last decade. Philanthropy New Zealand reported that in 2022, philanthropic funding in New Zealand totalled around \$3.8 billion, with government grants making up 57% of this amount. However, these figures are not keeping pace with inflation and the growing needs of communities. Additionally, the charity sector’s reliance on government contracts has created an environment where charities are often required to focus on compliance rather than on innovative delivery.

There is evidence to suggest that the charitable and philanthropic sectors are in part, perpetuates the challenges they are facing, with Charities Services noting in their 2021/2022 Annual Review, that 74% of charities were providing services in overlapping areas, often delivering similar activities in the same communities. This fragmentation and duplication were further evidenced by Charities Services Annual Review in 2023, where their survey found that 67% of charities reported that they were unaware of similar organisations working on similar initiatives within their region. The same is likely to be true for the funders supporting these organisations, who are likely duplicating resources and investment across communities, community organisations.

Fragmented and duplicated approaches to funding and delivery within the sector may inadvertently encourage organisations to address ‘symptoms’ rather than the ‘root cause’ of the issues they’re trying to address. This creates a risk that there will be a failure in achieving strategic alignment and coordination between organisations contributes to reduced inefficiencies, higher operational costs and reduced outcomes. This is further exasperated by the fact that available funding sources often do not cover core operational costs such as wages.

¹ Note our findings from this area of the literature is outlined and discussed in Section 6.
² These figures will have likely reduced in the past 12 months due to funding reductions in a number of areas.

2.2 There are Capacity and Capability Gaps in Community-led Environmental Management

Effective management of the use of public funds requires specialised knowledge and skills that are not uniformly available across communities. The ability to strategically plan, acquire funding, effectively implement activities and projects, and then undertake reporting and accountability activities is variable across community organisations, particularly those that are heavily reliant on volunteer support. This capacity and skill gap often hinders the long-term sustainability of organisations, both financially and in terms of the long-term impact of well-intentioned initiatives.

There is a growing body of evidence (such as Peters, Hamilton, and Eames (2015) and the Cawthron Institute (2021) that identifies that community-led environmental organisations and not-for-profit entities require substantial and ongoing administrative and technical support to operate effectively. In the case of ORC, this would imply that for 'large-scale' funding to be successful at achieving environmental outcomes, and reducing the reliance on long-term council funding, staff will need to provide consistent, dedicated and ongoing support to community organisations to achieve success.

2.3 The use of Contestable Grants creates Misalignment between Short-Term Funding and Long-Term Outcomes

The literature identifies a consistent challenge and tension between short-term funding cycles and the need for achieving long-term environmental outcomes. While contestable grant processes can provide an even playing field for community organisations, allowing smaller or newly established groups to compete for funding in a transparent way, the funding model undermines project continuity, forces groups into an unsustainable cycle of seeking new funding and shifts the focus away from a focus on strategic planning or long-term delivery. A contestable model further impacts on the organisation's ability to retain paid staff and contributes to fuelling the cycle of low organisational sustainability, especially if funding does not cover salary related costs.

It has been highlighted in the research that the over-saturation of charitable organisations is placing pressure on the availability of a skilled workforce, with smaller organisations being disproportionately affected by this, as they may struggle to attract skilled professionals who may be drawn to larger, more financially secure organisations.

The research and evaluations we reviewed highlighted that these inherently competitive funds incredibly time and resource intensive to manage and administer for both the funder and applicant. There is also evidence to suggest that they can inadvertently drive negative behaviours – by encouraging organisations to redirect or retarget their priorities (or deviate from strategy) to meet certain funding criteria to ensure their financial viability. There is evidence to suggest that these funds are often targeted towards supporting project costs, with 'new' initiatives often being given priority over investment in existing, maintenance or 'business as usual' activities.

2.4 The Importance of Flexible, Collaborative and Multi-Year Funding Models

The research uniformly calls for funding models that are more flexible, and that provide longer-term commitment and predictability for communities and community organisations. Several of the studies we reviewed emphasised the need for multi-year contracts as well as proposing the availability of untagged funds or overhead funds that could support the operating costs of organisations.

Recommendations further highlighted the importance of providing low competition or direct funding approaches that are based on high-trust and collaborative relationships between funder and deliverer/supplier. These approaches are likely to be resource intensive while relationships and trust are established however once in place, are time and cost-effective compared to annual grant making processes. Evaluations of both the Auckland Council's Community Coordination and Facilitation (CCF) Grant Pilot and Jobs for Nature Programme found that cross-agency partnerships and embedding funded roles within communities (such as paid coordinators) increased community and environmental impact.

While these models are encouraged and provide opportunities for enhanced collaborative action (aligned to strategic long-term plans and goals), this approach may disadvantage smaller, newer, or lesser-known groups from securing funding. More flexible models do not assume that procurement rigour or transparency is lost or minimised, nor are they intended to create the conditions for a long-term (or 'forever') reliance or expectation that council funding will be ongoing for significant periods of time. Funder managers (in this case ORC staff) will need to ensure stringent adhere to due diligence and conflict of interest processes are maintained to ensure that perceived or actual conflicts are identified and managed. This is relevant for both ORC staff and elected members who can form close relationships and high levels of trust with potential funding recipients and community organisations as collaborative planning and delivery activities grow and evolve.

A think piece produced by the Western Bay of Plenty Regional Council (2024) identified a number of reasons why collaborative arrangements struggle to become embedded and sustainable, such as the slow speed of councils to respond to requests, needs or opportunities, high turnover of council staff, the extent of reporting and monitoring needs required by council, the inability or unwillingness for projects to be fully funded, and a loss of intellectual property. A significant finding of the paper identified that collaborative and high trust relationships between community organisations and the council were usually reliant on an individual council staff member, and not with the organisation, and therefore these collaborative relationships broke down when/ if the individual left council.

2.5 The Role of Council Beyond ‘Funder’

Modern approaches to funding and procurement require councils (as well as other funders) to evolve their processes and approaches from being merely grant makers to being enablers of collaboration and innovative practices. ORC could play a key leadership role in this future space, working in partnership with neighbouring local authorities, other grant funders and community organisations. This shift has been advocated for in several key reports, such as the 2017 evaluation of the Ministry for the Environment’s Small-Scale Contestable Fund and Sustained Network Fund. The literature recommends that this leadership could be enacted in the following ways:

- Aligning investment with larger groups or umbrella type organisations who have a proven track record of delivery.
- Investing in organisational capability and sustainability that enhances the wider delivery system.
- Incentivising innovation.
- Collaborating across agencies.
- Supporting regional and national networks where relevant and applicable.

2.6 Monitoring, Evaluation and Reporting

Evidence shows that effective environmental stewardship depends on outcome-based monitoring, but that community groups and organisations are often either under-resourced from a capacity, financial or capability perspective that provides meaningful information to support ongoing investment or environmental outcomes.

The literature recommends that monitoring should be fit-for-purpose and aligned to the value and accountability requirements of the funding received. Doole, 2024, urged that funders work together at a local and regional level to become better aligned in their reporting requirements (especially when multiple funders are supporting the same organisations or initiatives), to simplify processes and reduce duplication.

2.7 Summary


As we anticipated, our review of the literature did not provide us substantive concrete evidence that would recommend one single, ‘right’ approach to funding model design and implementation. As is often the case with research, there are differing views or opinions present and there are several external factors that contribute to the success of each initiative, programme or project, such as socioeconomic or political factors. Success can be highly situational and contextual, and not always attributable to the funding model used to support project or programme delivery.

What is clear from our review, is that the body of evidence to support councils and other funders to make effective decisions regarding their funding model design and implementation, is still evolving. There are however consistencies in the trends that emerged from the literature which are summarised below:

- **A movement away from competition to collaboration:** There is consistency and alignment with the view that competitive funding models are detrimental to sector cohesion and the achievement of outcomes. This is evidenced in other sectors outside of environmental management or conservation.
- **The need to professionalise community efforts:** Embedding paid staff and building the infrastructure to support the wider system is vital to achieving outcomes. Having the right expertise to activate volunteers enhances impact.
- **Sustainability needs to be a core guiding principle:** Both ecological and financial sustainability require long-term thinking and a commitment by funders (both government and non-government) and community organisations.
- **Systemic flexibility and responsiveness:** System leadership (which in this case should be provided by ORC) requires a purposeful effort to provide adaptive funding, streamlined processes, and reduced administrative burden for all parties. This requires a deliberate intention to change behaviours and support the system to create a culture of self-sufficiency and sustainability that reduces the reliance and expectation of long-term and ongoing council investment.



Appendix 3: ORC Councillor Workshop 1 – Presentation



frequency

Council Workshop

Future Strategy and Priorities for ORC Environmental Funding

22 October 2024

Council Meeting - 25 June 2025

frequency

Welcome and Introductions

2

frequency

Workshop Purpose

- Revisit the purpose, allocation and structure of **existing** environmental funding allocated by ORC
- Consider and discuss the ORC's **future vision, strategy, and environmental priorities** for future investment in environmental programmes and activities
- **Agree a high-level approach** to the purpose, design and implementation of future environmental funding and priority investment areas
- Help inform staff and consultants in their development of a **detailed report and recommendations** that will guide future decision making around investment structure, investment opportunities; and
- Note any **unresolved issues or concerns** that will need to be addressed in this work



Meet Our Team

01. EMMA HODGKIN *SENIOR ASSOCIATE*

Emma is based in our Ōtepoti office and comes to Frequency with over 20 years' experience in senior roles, predominately in the public sector. She has worked for the last decade as a consultant, providing strategic support and advice, procurement, programme and project mgmt. services to central and local government, and NFP clients.



02. MARINAH RONDEL *GRADUATE*

Marinah is a valued graduate in our Ōtautahi team and comes with a diverse background in architecture. A significant part of her studies focused on the practical implementation of the Christchurch Central Recovery Plan and Kaikoura District Council's LTP emphasising sustainable strategies and their impact on communities in post-earthquake environments.

frequency

Workshop Agenda

Time	Item	Discussion Lead
2.00pm – 2.15pm	Welcome and Workshop Opening	Chair
2.15pm – 3.00pm	Analysis and discussion of current structure Environmental Funding Structure	Libby Caldwell & Emma Hodgkin
3.00pm – 3.20pm	NZ and overseas examples of Environmental Funding Initiatives	Emma Hodgkin & Marinah Rondel
3.20pm – 3.30pm	BREAK	
3.30pm – 4.15pm	Presentation and Discussion of pre-workshop survey findings to obtain agreement and alignment	Emma Hodgkin
4.15pm – 4.45pm	Unsolved issues and questions to address before moving forward	Emma Hodgkin & Libby Caldwell
4.45pm – 5.00pm	Agreed actions and next steps	Emma Hodgkin
5.00pm	Closing	Chair

frequency

Current Environmental Funding Structure

A brief snapshot of the 'current state'

7

frequency

Background Context and Strategic Intent

- Currently supports areas of biodiversity, biosecurity and water quality
- Since 2018 funding increased and diversified
- 2024-34 LTP consultation proposed increased investment of \$500,000 a year from 2025/26.
- Feedback from submissions confirmed the need for ongoing investment
- Final LTP resolved to allocate \$2 million a year of funding for large-scale environmental projects from 2025/26, funded by an Otago-wide catchment management rate, with interim increase of \$500,000 in 2024/25 funding
- Additional \$2M will be on top existing funds and is to support 'large-scale environmental initiatives'



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8

frequency

Jobs for Nature

- Was a \$1.19B multi-agency programme to benefit the environment and create jobs as part of the govt wide COVID-19 recovery package
- Project ended 30 June 2024 after providing investment of \$61.9M into Otago, supporting 32 projects (to 30 Sept 2023)
- Provided 910 employment opportunities and funded 588,845 worker hours
- Projects were supported by DOC, MfE, MPI, LINZ and Kānoa
- Significant investment in a number of strategically important projects at risk by loss of funding – such as the Te Wai Whakaata Restoration Project - \$5.45M total funding

frequency

Current Environmental Funding Structure



Funding currently consists of

- General ECO Fund
- Various incentive funds
- Large scale biodiversity funding

Direct funding currently includes

- Wilding Conifer groups
- One-off activities or initiatives such as Ballance Environmental Awards

Related to environmental outcomes but outside this scope

- Consent fee fund
- Ad hoc requests
- Nationally funded initiatives such as Toitū Te Hākapupu

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Fund Type	Total \$\$	Max. \$ allocation p/project	Term of investment	Scope of Investment	Eligibility
General ECO Fund	\$318,630.00	\$50,000	1-3yrs	Community projects that protect, enhance or promote ORC environment. Can fund up to 50% salary/wage costs.	<ul style="list-style-type: none"> Groups of landowners Educational Institutions community groups Iwi/hapū
Incentive Funding – native planting (pest mgmt.)	\$50,000.00	\$15,000	1-3yrs	Native planting or regeneration after the removal of pest plants.	<ul style="list-style-type: none"> Groups of landowners Educational Institutions Community groups Iwi/hapū
Incentive Funding – native planting (water)	\$50,000.00	\$15,000	1-3yrs	Planting or regeneration of native vegetation in riparian areas to improve water quality.	<ul style="list-style-type: none"> Groups of landowners Educational Institutions Community groups Iwi/hapū
Incentive Funding – biodiversity on private land	\$100,000.00	\$15,000	1-3yrs	Protecting privately owned land.	<ul style="list-style-type: none"> Individual landowners
Incentive Funding – rabbit mgmt.	\$100,000.00	\$50,000	1-3yrs	Long-term coordinated community-led rabbit management.	<ul style="list-style-type: none"> Groups of landowners NFP community groups Some individual properties
Large Scale Biodiversity	\$300,000	\$50,000 - \$150,000	1 year	Projects with large scale biodiversity outcomes.	<ul style="list-style-type: none"> May involve pest management, habitat enhancement, protection of high value areas

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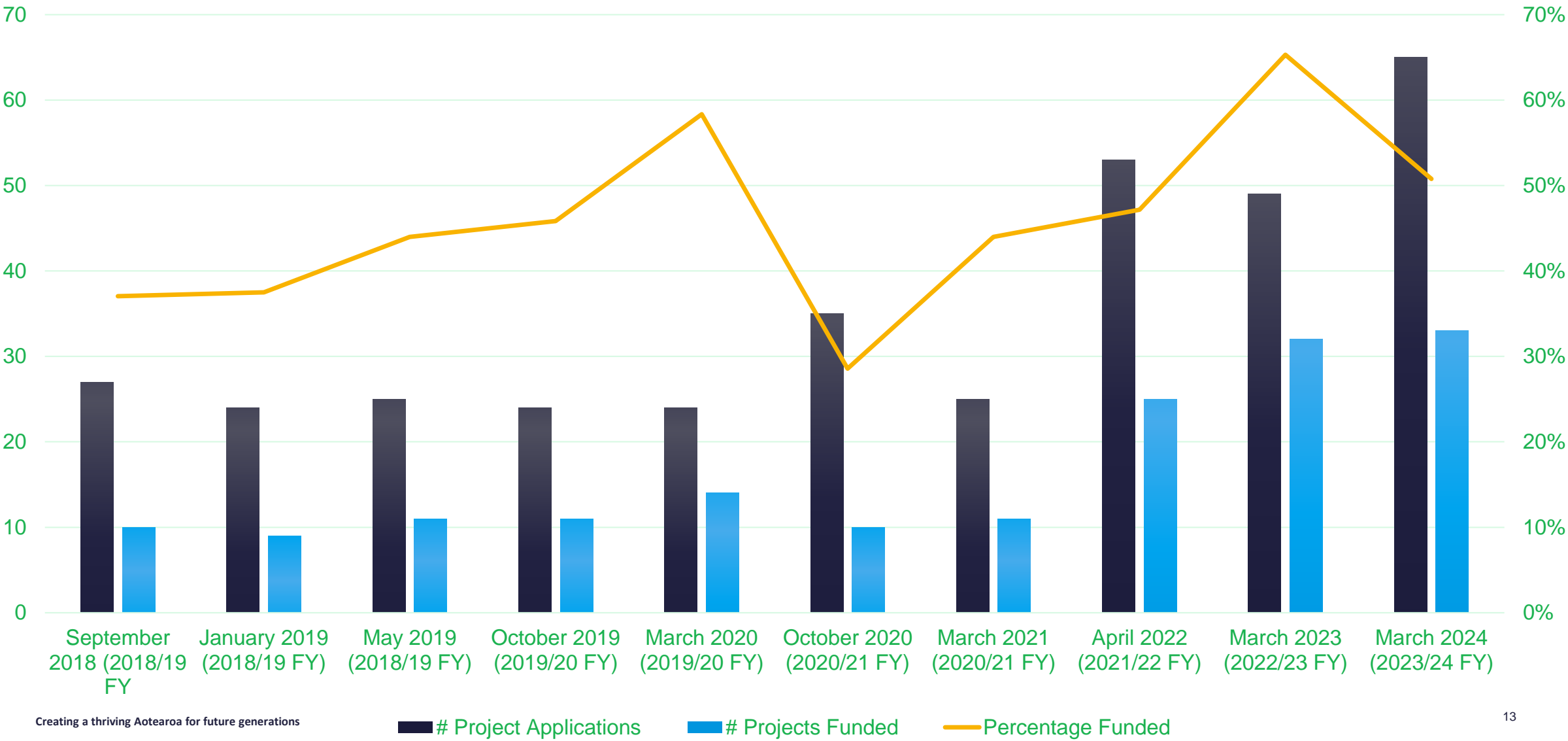
frequency

Environmental Funds Requested in 2023/24 Application Process (March 2024)

Category	# of Applications	Funds Requested	Funds Available	% over or under subscribed
ECO Fund (general)	31	\$989,091.15	\$318,600.00	310%
Incentive Funding – sustained rabbit mgmt.	10	\$249,740.78	\$100,000.00	250%
Incentive Funding – native planting after plant pest removal	4	\$47,978.17	\$50,000.00	96%
Incentive Funding – native planting for water quality	0	\$0	\$50,000.00	100%
Incentive Funding – biodiversity enhancement on protected private land	10	\$149,379.00	\$100,000.00	149%
Large-scale biodiversity	10	\$1,270,387.82	\$300,000.00	423%
TOTAL	65	\$2,706,576.92	\$918,600.00	295%

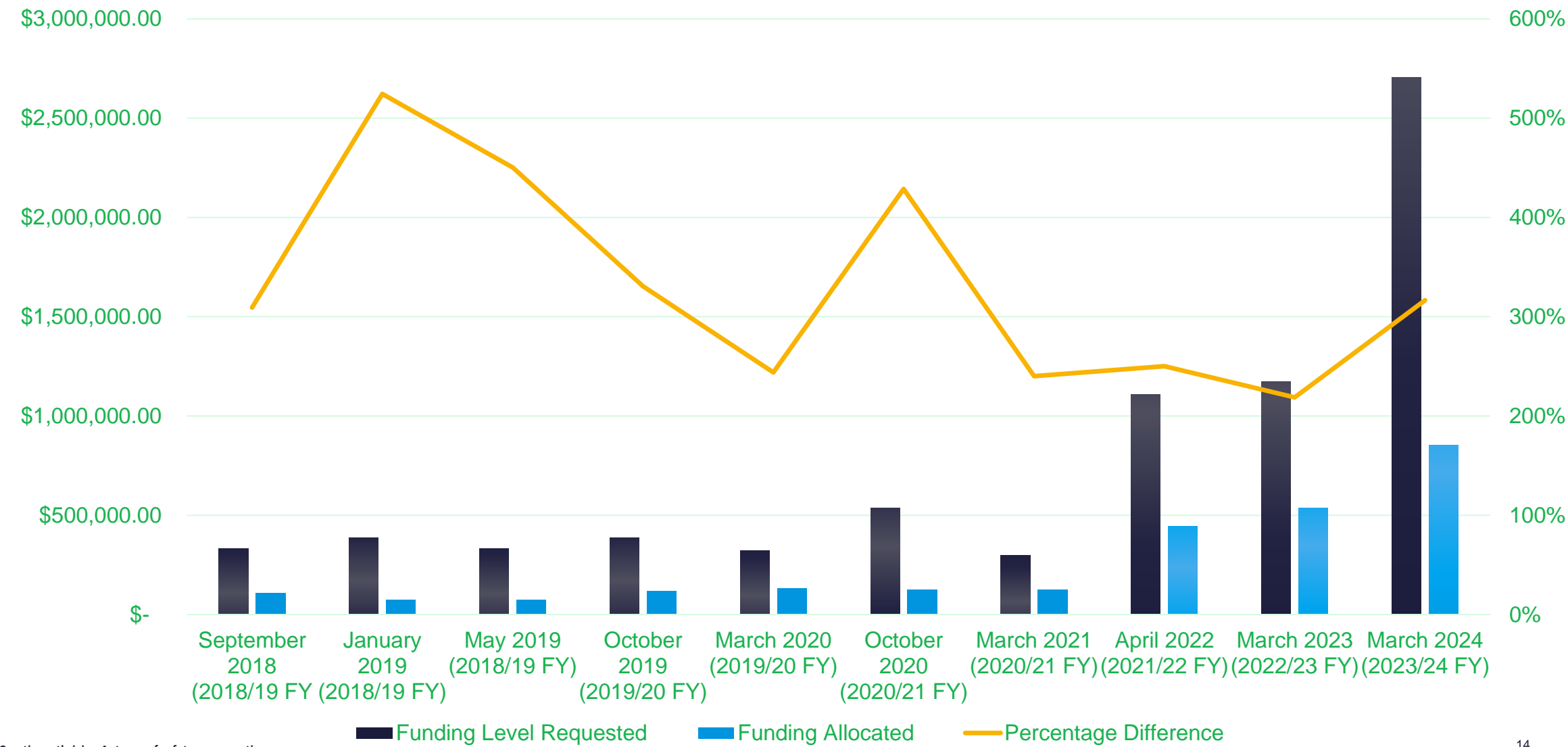
frequency

Changes in Number of Applications and Number of Funded Projects (Contestable Funding) 2018/19 -2023/24 FY

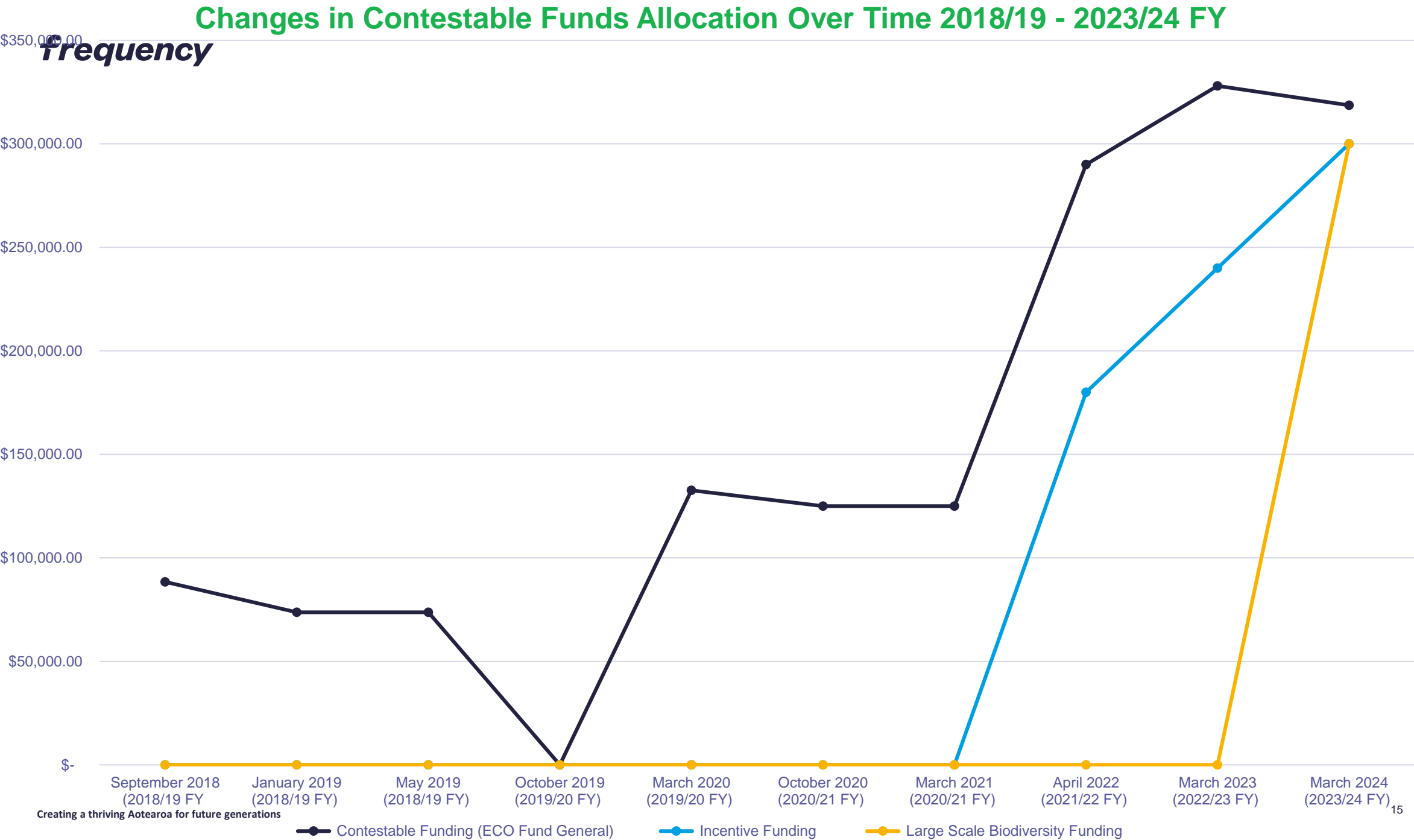


frequency

Changes in Levels of Contestable Funding Requested and Funding Allocated
2018/19 – 2023/24 FY



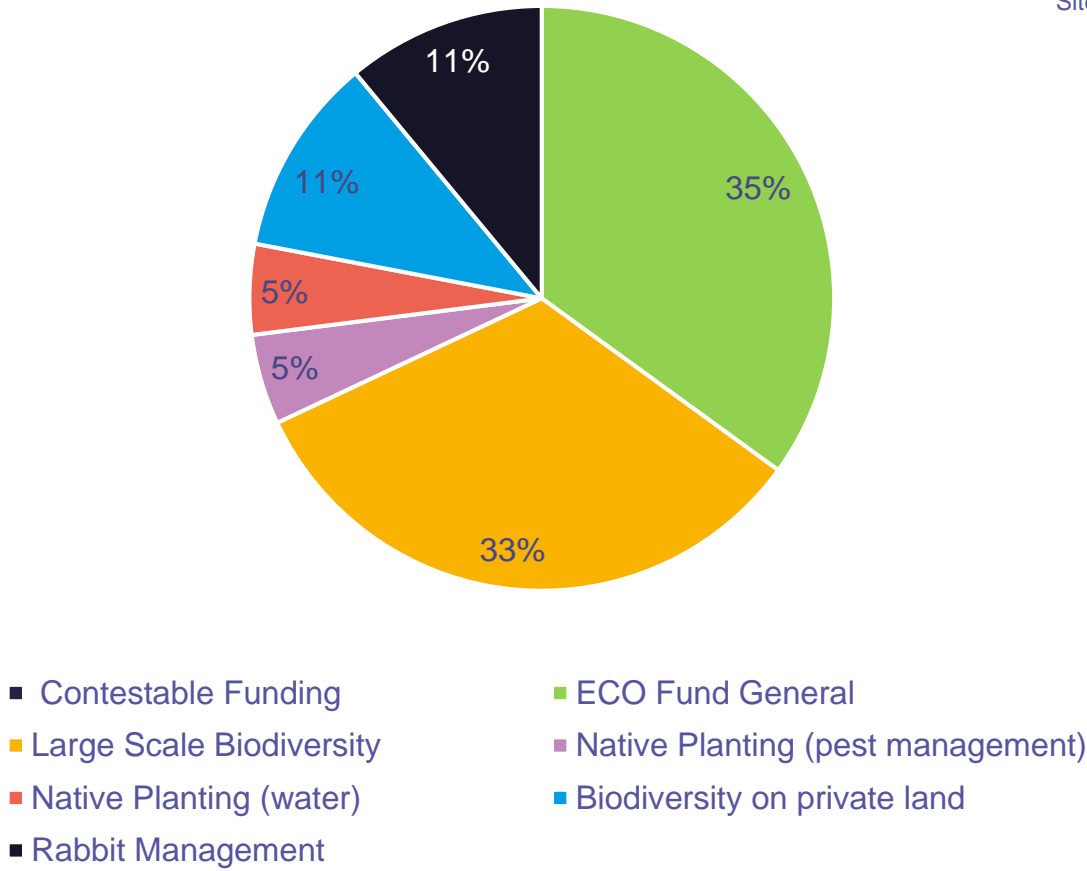
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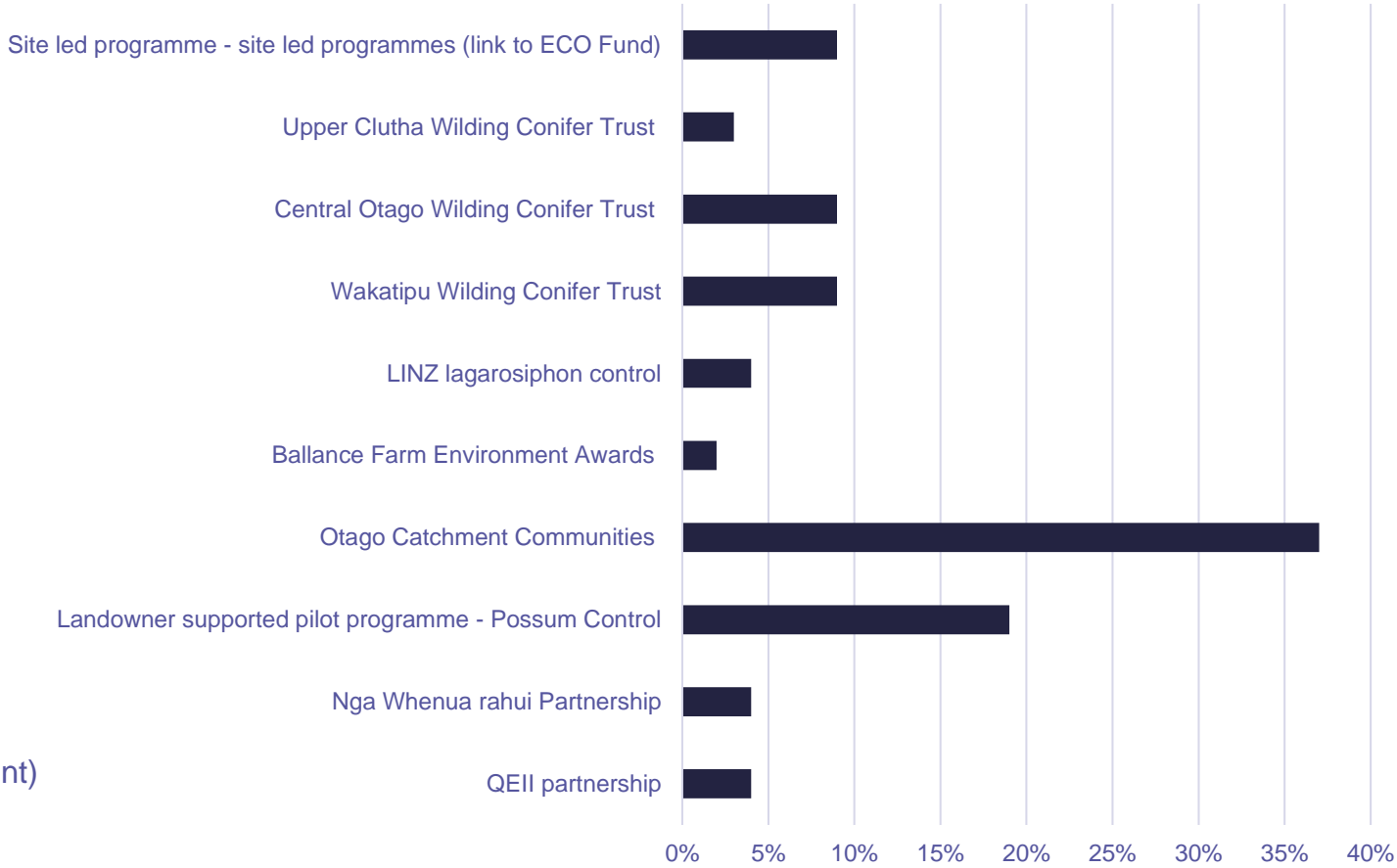
frequency

Contestable Funding	Non-Contestable (Direct) Funding
44%	56%

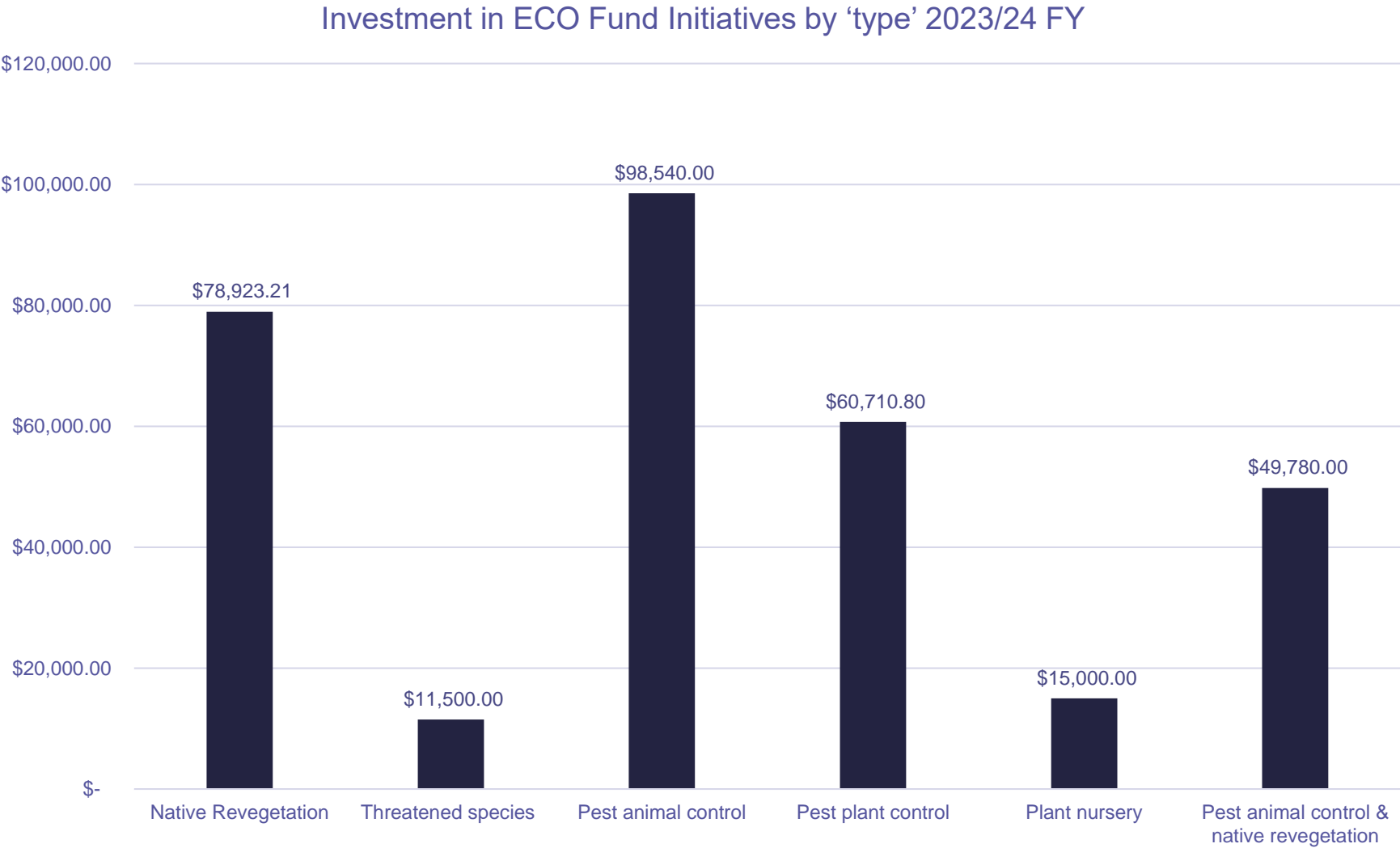
Contestable Funding by Type

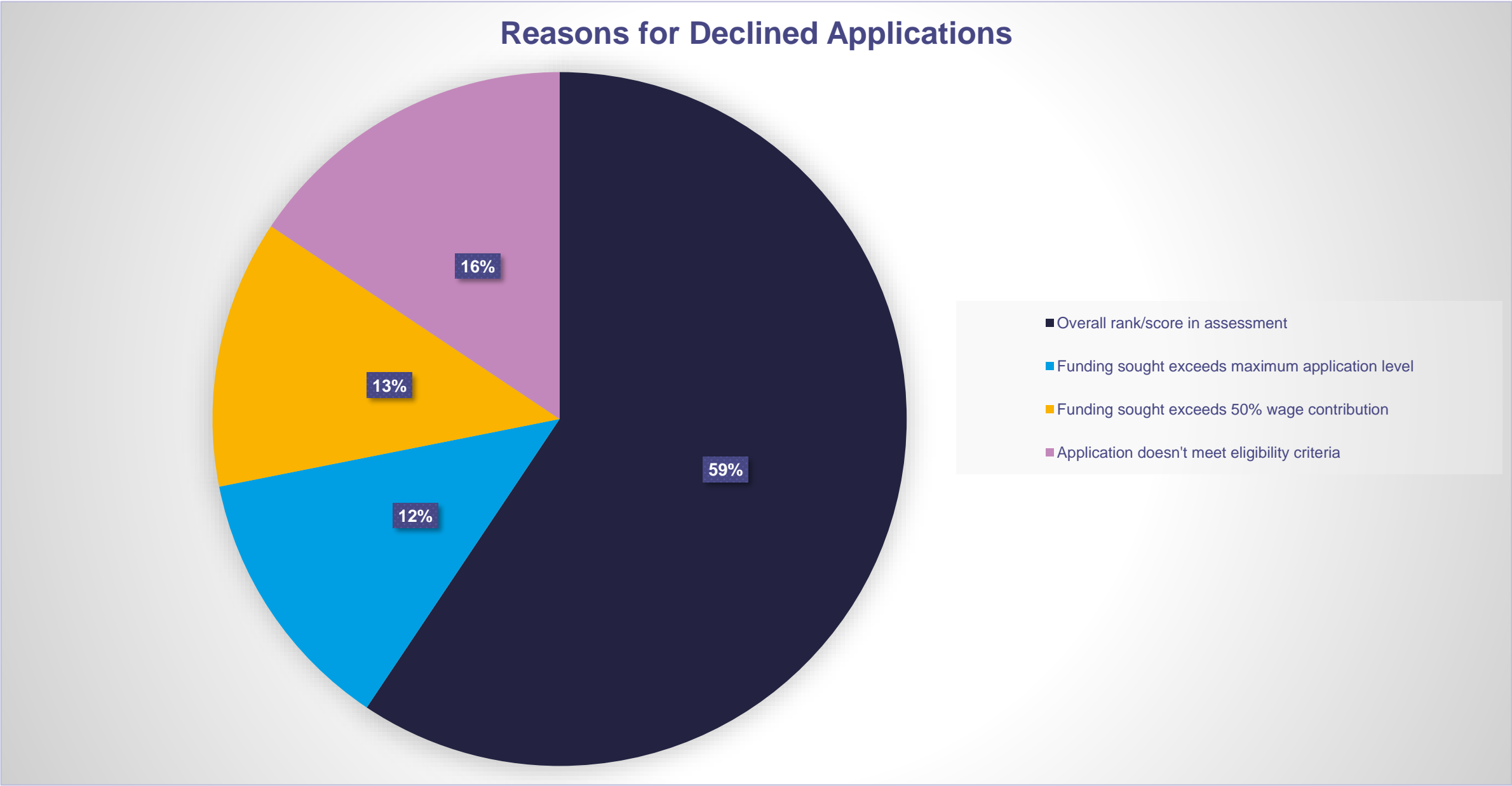


Non-Contestable Funding by Contract



frequency





frequency

LTP Feedback on Environmental Funding

A significant item re-iterated was the uncertainty of ongoing funds and resources for the continuation of pests and biosecurity projects. This is further supported by many suggestions of providing education, research and upskilling the community to engage in large-scale projects.

Climate change

- Concerns about the response to climate change events including flooding and environmental resilience.

Biosecurity & Pest management

- More resources for pest management between large groups and individuals are required over areas of significant ecological value.

Research/Education

- Concerned about the lack of knowledge on environmental issues within the community and resources to carry out monitoring and research.

Trending Themes:

- Flood land resilience
- Climate change
- Funding for large-scale projects
- Water quality
- Air quality
- Pest management
- Biosecurity
- Clear direction on project funding
- Biosecurity; Pest Plants and Animals
- Research

frequency

Findings from ECO Fund Survey

Applicants

Challenges in the ECO Fund Application Process

- Lengthy forms, duplicated details, and complex eligibility requirements.
- 33% of organisations applying are unregistered or incorporated societies.

Improvements Suggested by Applicants

- Clearer criteria and access to personalised help.
- Greater number of funding rounds, better feedback processes & increased support for wage costs.

The Importance of ECO Fund for Projects

- Half (49%) of the projects could not proceed without ECO funding.
- Most common projects: pest management, biodiversity conservation, securing additional funding, and engaging the community.

Assessors

Landowner Access to Grants

- Support for private landholders to apply for grants to some funds such as pest control and water quality.

Eligibility and Ongoing Funding

- Eligibility criteria should allow for the maintenance of a handful of existing projects.
- Supports capping the amount unformed groups can apply for.

Project Evaluation

- All staff to be familiar with assessment criteria.
- Challenges in scoring a diverse range of projects.

Educational Projects

- Concern that educational projects not scoring well under the current criteria.

frequency

Examples of Environmental Funding Initiatives

An example from NZ and overseas

frequency

Waikato Regional Council– Environmental Funding

Small Scale Community Initiatives Fund (SSCIF) (Contestable)

- To support projects in ecological restoration through animal and plant pest control.

Natural Heritage Fund (Contestable & Direct Funding)

- To support community projects with long-term, large-scale, intergenerational ecological benefits.
Or assisting in securing public assets.

The Environmental Initiatives Fund (EIF) (Contestable)

- To provide one-off grants to projects which provide environmental benefit or education.

Enviro Schools Fund (Contestable)

- To assist Enviro Schools with environmental projects that enhance nature or are educational.

Dr Stella Frances Scholarship (Contestable)

- In partnership with DOC, the scholarship supports final year students in studying environmental issues in the Waikato region, with the intention that the funds are to pay research expenses.

Fund type	Total \$\$	Max allocation	Term	Who can apply	Assesment Criteria
Small Scale Community Initiatives Fund (SSCIF)	\$150,000	\$5,000	1 year	<ul style="list-style-type: none">• Individuals• Volunteer community groups	<ul style="list-style-type: none">• Aligns with Pest Management Plan.• Ecological significance.• Community participation.• Collaboration.• Project budget.• Viability.
Natural Heritage Fund	\$1.4 million	\$300,000	4 years	<ul style="list-style-type: none">• Legal entities/groups• Tertiary education institutions	<ul style="list-style-type: none">• Environmental enhancement.• Long-term benefit/viability.• Participation/awareness.• Collaboration.• Mana Whenua (involvement and values).
The Environmental Initiatives Fund (EIF)	\$380,000	\$40,000	Undefined	<ul style="list-style-type: none">• Legal entities• Community Groups• Landowner groups• Tertiary education institutions	<ul style="list-style-type: none">• Fits within LTP values.• Promote and/or enhance.• Collaboration.• Viability.• Budget.• Value to Mana Whenua .
Enviro Schools Fund	Undefined	\$5,000	6 months	<ul style="list-style-type: none">• Enviro schools within the Waikato region	<ul style="list-style-type: none">• An Enviro school• New initiative, new to the area, extension of existing project.• Follow Enviro school guidelines.
Dr Stella Frances Scholarship	\$6,000	\$6,000	1 year	<ul style="list-style-type: none">• University of Waikato final year master students	<ul style="list-style-type: none">• Natural or physical sciences.• Human perspectives in the environment.• Environment management practice.• Technology.

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frequency

Environment Victoria – Environmental Funding

Victorian Landcare Grants – Environment (Contestable)

- To support land care/volunteer group projects involving education, capacity building, and protecting and restoring the natural environment.

Strengthening Local Government Partnerships (Contestable & Direct Funding)

- To support local governments and communities collaboratively to reduce bushfire risks and build resilience.

Bush Bank – Public Restoration & Protection Grants (Contestable)

- To support local governments and communities collaboratively to reduce bushfire risks and build resilience.

Bush Bank – Private Restoration & Protection Grants (Contestable)

- To support the restoration of the natural environment, increase biodiversity and carbon sequestration on private land.

Victorian Junior Landcare and Biodiversity Grants (Contestable)

- To support projects that educate young people about biodiversity and the natural environment.

Nature Fund (Contestable)

- To support high-impacting projects that are within the scope of Victoria’s Environment – Biodiversity 2037 (Biodiversity 2037), the Government’s plan

Fund type	Total \$\$	Max allocation	Term	Who can apply	Assessment Criteria
Victorian Landcare Grants - Environment	\$3.62 million	\$20,500	1 year	<ul style="list-style-type: none">Registered GroupsUnregistered organisations	<ul style="list-style-type: none">Land & environment outcomes.Community engagement and capability building.Demonstrates fulfillment of a need & community benefit.Project design & group/network capacity.Value for money.
Strengthening Local Government Partnerships	Not provided	\$150,000	2 years	<ul style="list-style-type: none">Local Government Authorities	<ul style="list-style-type: none">Add value & fill a gap in projects needed.Collaborative with government and communities.Community orientated.Sufficient capacity and capabilities.Outlines how funding is used.Delivery and sustainability.
Bush Bank – Private Restoration & Protection Grants	\$30.9m	Undefined	5 years	<ul style="list-style-type: none">Private entitiesIndividuals	<ul style="list-style-type: none">Expertise and experience.Landowner relationship.Priority landscape value alignment.Biodiversity benefit.Carbon outcomes.Broader Project benefits.
Bush Bank – Public Restoration and Protection Grants	\$46.1m	\$5 million	5 years	<ul style="list-style-type: none">Registered organisationsNot-for-profit entities	<ul style="list-style-type: none">Expertise and experience.Project RiskSelf-determination enabled.Biodiversity benefits.Carbon benefits.Broader project benefits.
Victorian Junior Landcare and Biodiversity Grants	\$405,000	\$5,000	1 year	<ul style="list-style-type: none">SchoolsChildcare centersYouth groups	<ul style="list-style-type: none">Meets “Victoria Value Nature” scheme.Meets “Victoria’s natural environment is healthy” scheme.Project activities.Student or youth involvement.Community engagement.Project

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frequency

Findings of the Pre-Workshop Survey

Discussion to achieve alignment

frequency

The survey tested the following thinking and ideas...

1.

Strategic Priorities

And the importance of alignment to organisational and environmental outcomes

2.

Vision for the Future

The scale of environmental outcomes you want this funding to achieve and the level of impact

3.

Size and Scale of Initiatives

The level of investment you want to make in individual projects, the term you want to invest for and the types of initiatives you want to fund

4.

Funding Type

The scale of funding you'd like directly allocated vs contestable community funding

5.

Project Delivery

Who you want to deliver programmes and projects on your behalf and the level of formality and accountability desired

6.

Defining Large Scale for Future Investment

Defining what your future increased investment will look like

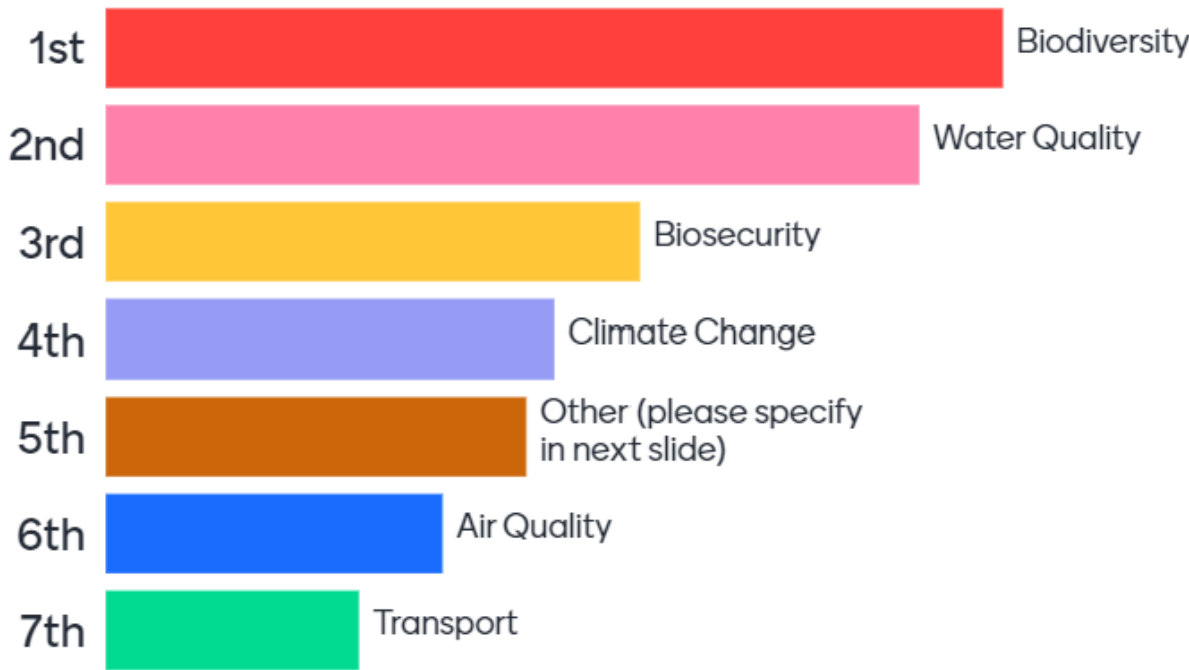
frequency

The Results

Priority funding domains and long-term vision

frequency

Results Question 1a



Environmental Area	Range of Responses
Biodiversity	1 st – 2 nd
Water Quality	1 st – 3 rd
Biosecurity	2 nd – 7 th
Climate Change	1 st – 6 th
Other	
Air Quality	4 th – 7 th
Transport	5 th – 6 th

frequency

Discussion

- Why did you rank the domains the way you did?
- Did you rank any equally that the survey wouldn't let you show/choose?
- What do we need to understand/discuss/agree before we can agree a final priority list?
- Why do you think there's such a range of views in areas such as biosecurity and climate change?
- What are the 'other' domains that you thought of?

frequency

Question 1b.

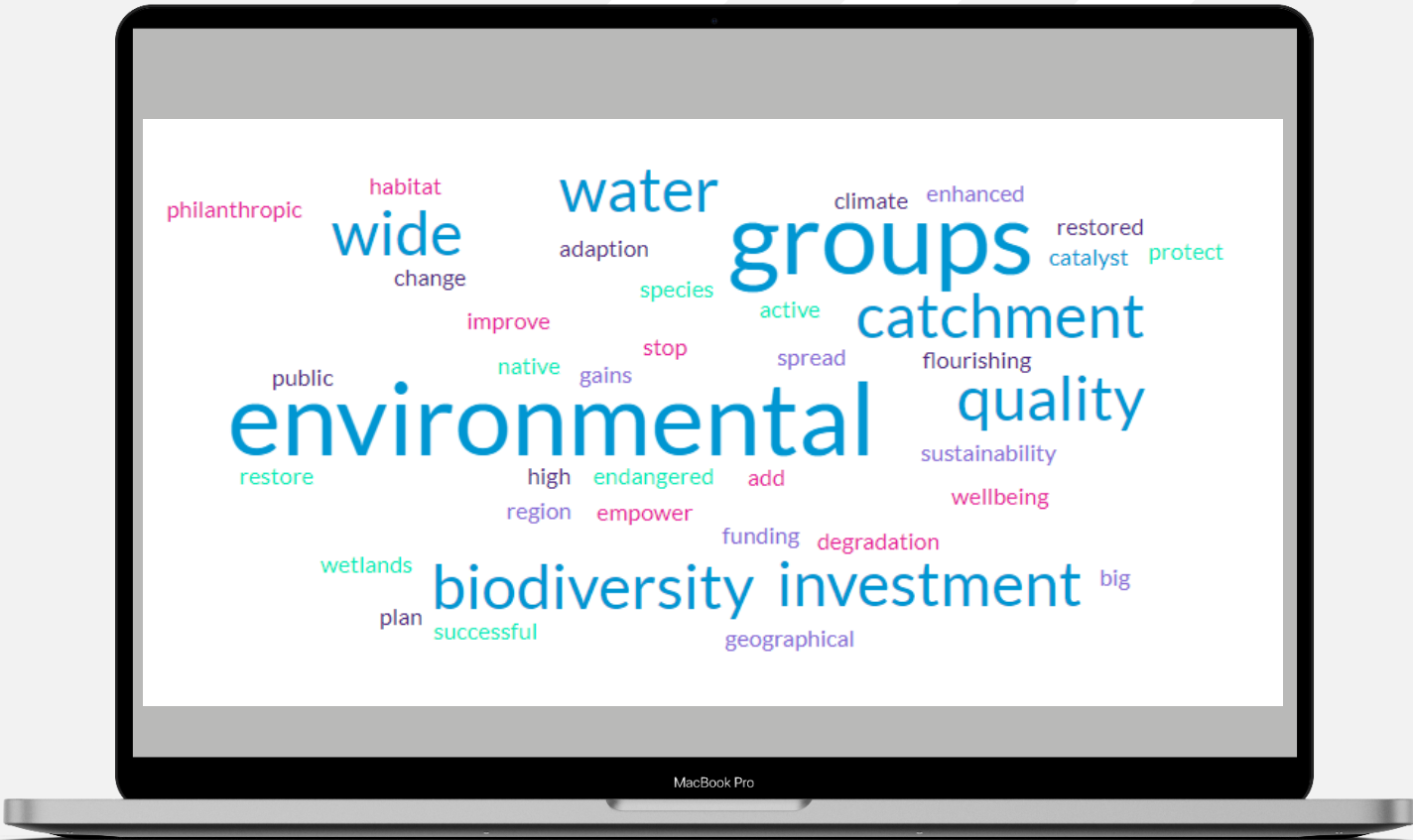
5-year vision



frequency

Question 1b.

10-year vision



frequency

Discussion

- Do you currently have an agreed or united vision?
- If you don't already share the same vision, how do they differ?
- What are the outcomes you want to achieve or the impact you want to make?
- What do you need to achieve alignment?
- What's your elevator pitch for investment in this area?

frequency

The Results

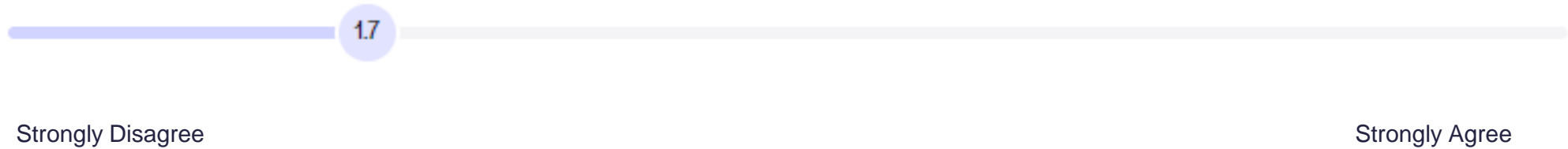
Funding Intent, Outcomes and Structure – level
of agreement on statements

frequency

a. Environmental Funding decisions should directly align with ORC strategic outcomes and priorities

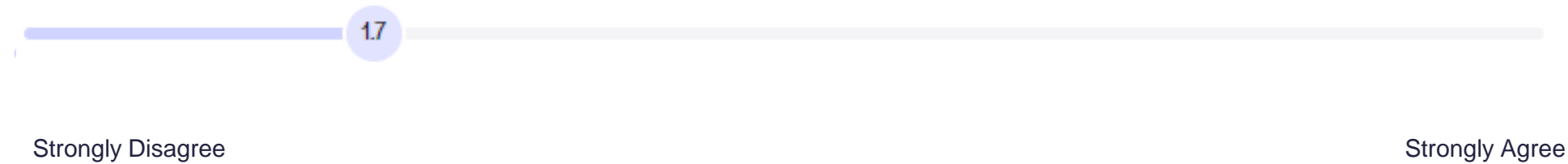


b. Initiatives that contribute to or enhance community engagement are more important than funding initiatives that contribute to environmental outcomes

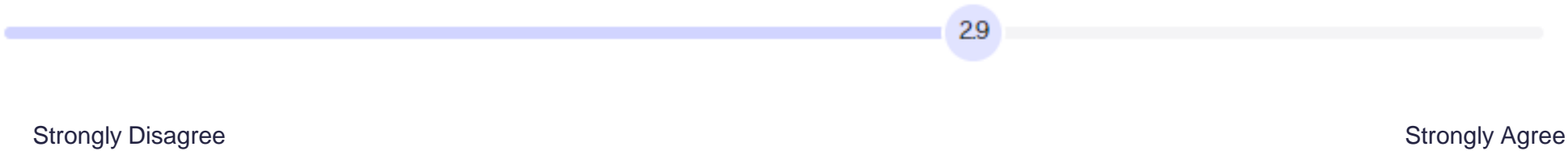


frequency

c. I am more comfortable funding small one-off projects or single year projects than investing in large-scale or long term initiatives

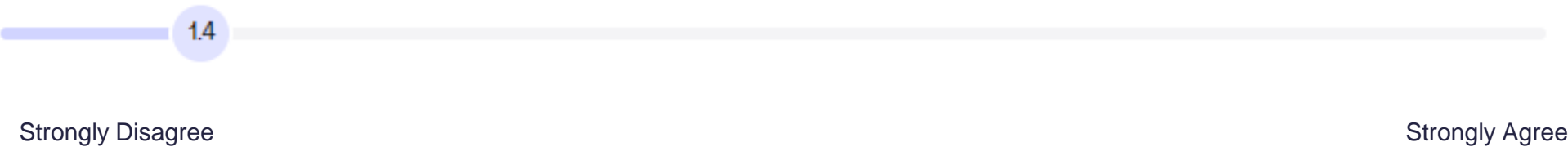


d. It is the role of ORC to fund long-term environmental programmes over discrete one-off projects

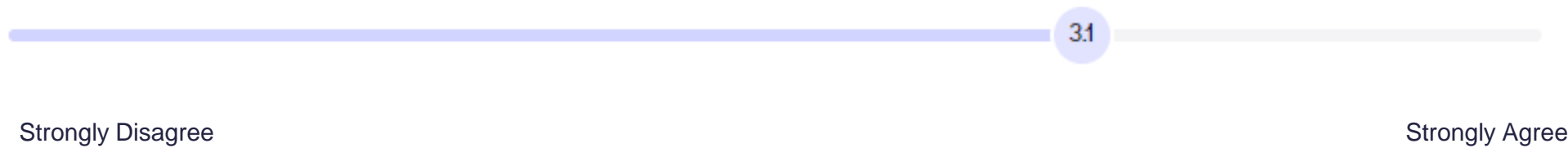


frequency

e. Environmental Funding should be equally allocated across Wards, regardless of alignment to our environmental needs

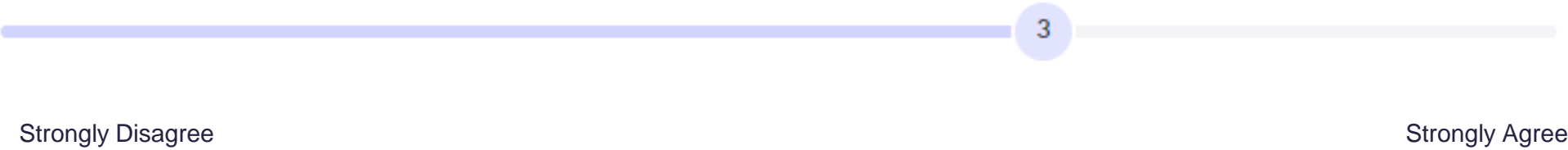


f. In current ECO Fund eligibility criteria, applicants can apply for up to 50% of salary costs for project delivery. ORC should continue supporting these costs

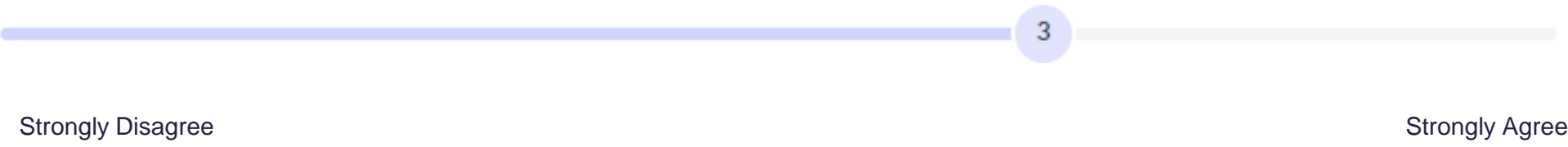


frequency

g. The purpose of Environmental Funding is to give groups a ‘hand up’ not a ‘hand out’ projects we support need to be sustainable past 3 years of ORC funding



h. In future, we should increase our investment in initiatives that enhance environmental outcomes on private land



frequency

i. In future, ORC should investigate other funding ‘pots’ such as offering scholarships to support environmental or action-based research



j. I am comfortable with the level of accountability the Council receives from our investment, and we receive value for money



frequency

Discussion

Areas of Alignment

- Investment should align to strategic outcomes and have environmental impact
- Level of comfort funding multi-year high investment projects
- Funding should be assigned based on need
- Importance of environmental outcomes of private land

Areas of Misalignment

- Role of ORC to fund one-off projects vs long term funding
- Whether funding purpose is a hand-out or hand up
- Level of comfort with funding large, multi-year projects is high but this doesn't flow into question around ORC role
- ORC role in contributing to salary costs
- The importance of other funding 'pots' to support education and research
- Level of comfort with accountability of spend and current value for money

frequency

Discussion

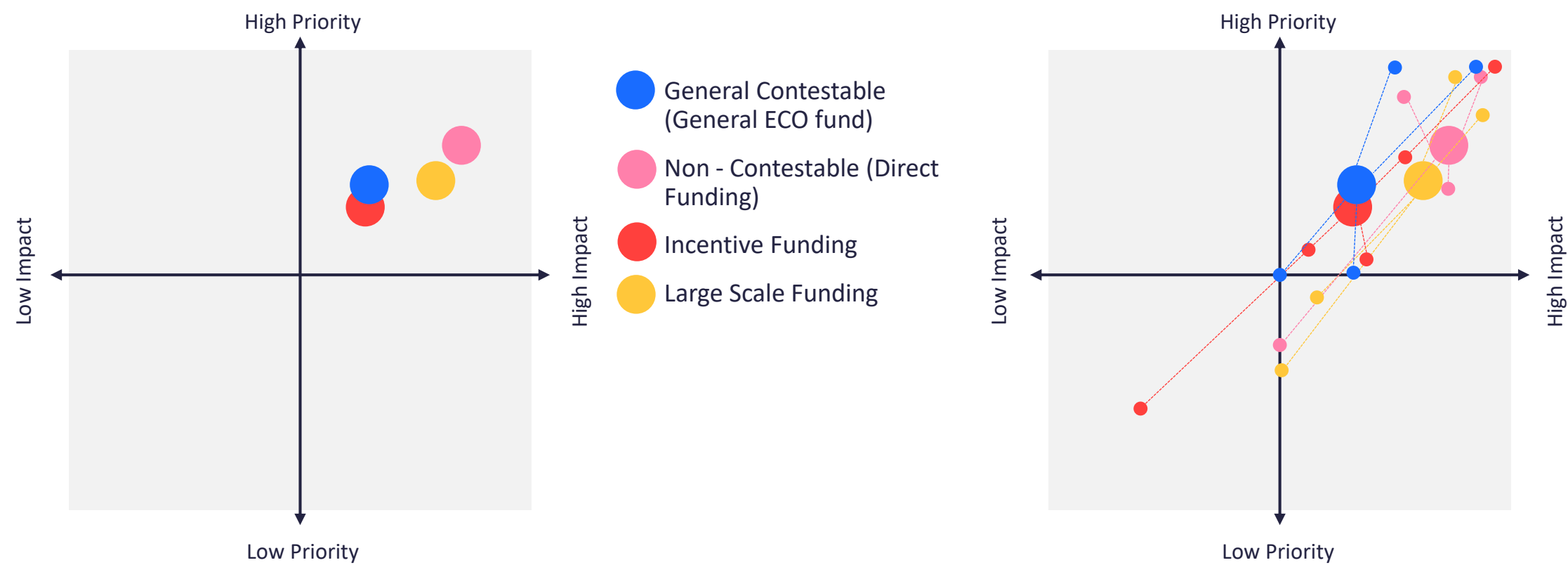
frequency

The Results

The Way Environmental Funding initiatives are funded

frequency

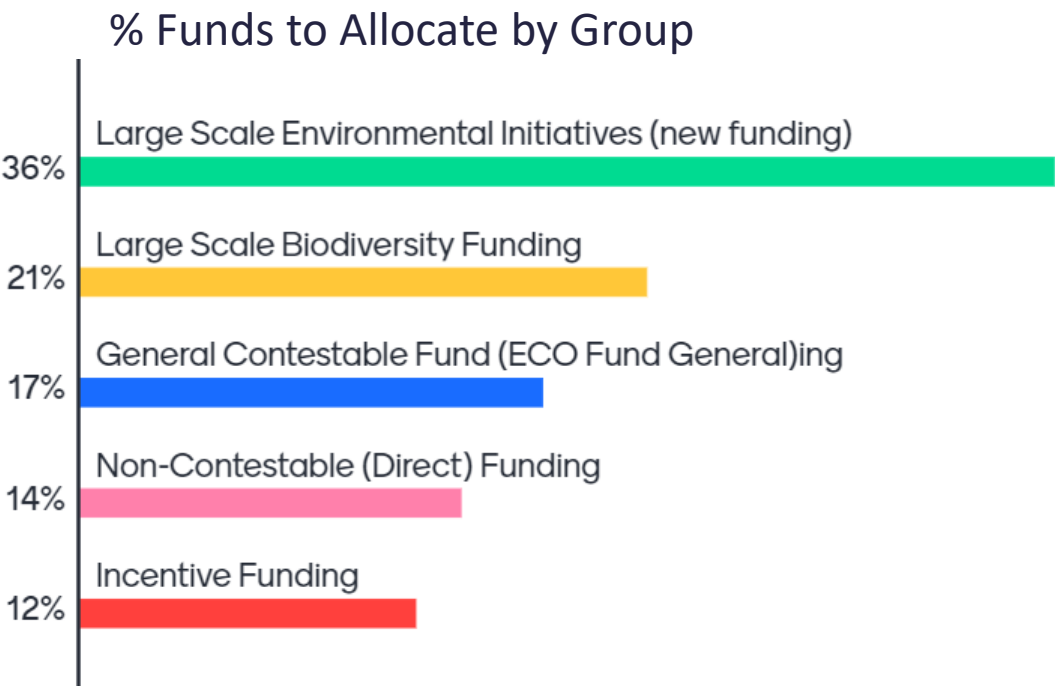
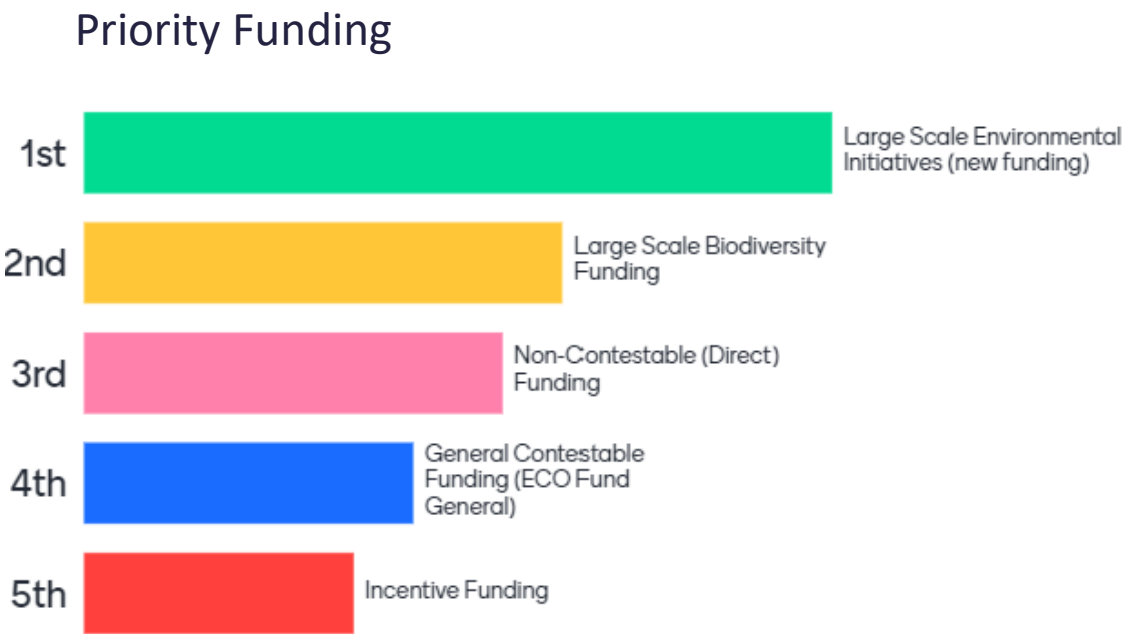
Priority and Impact of Funding by Type



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frequency

Importance of Funding by Type and % Allocation by Fund



frequency

What this allocation would mean in the future

Funding Type	Proposed Rank	Current %	Current \$	Future %	Future \$
Large-scale environmental (new funding)	1	0%	\$0	39%	\$1,560,000*
Large-scale biodiversity	2	14.5%	\$300,000	22%	\$880,000
Direct Funding (non-contestable)	3	56%	\$1,151,000	15%	\$600,000
Contestable Funding (ECO Fund only)	4	15%	\$318,630	15%	\$600,000
Incentive Funding	5	14.5%	\$300,000	9%	\$360,000
TOTAL		100%	\$2,069,630	100%	\$4,000,000

* Current LTP approval \$2M but noting large-scale not yet defined

frequency

Discussion

- What basis did you make your assessment of priority and impact?
- Are you surprised by the range and distribution of views?
- Looking at the future preferences with current funding, what's the level of comfort in what the future of direct funding would look like?

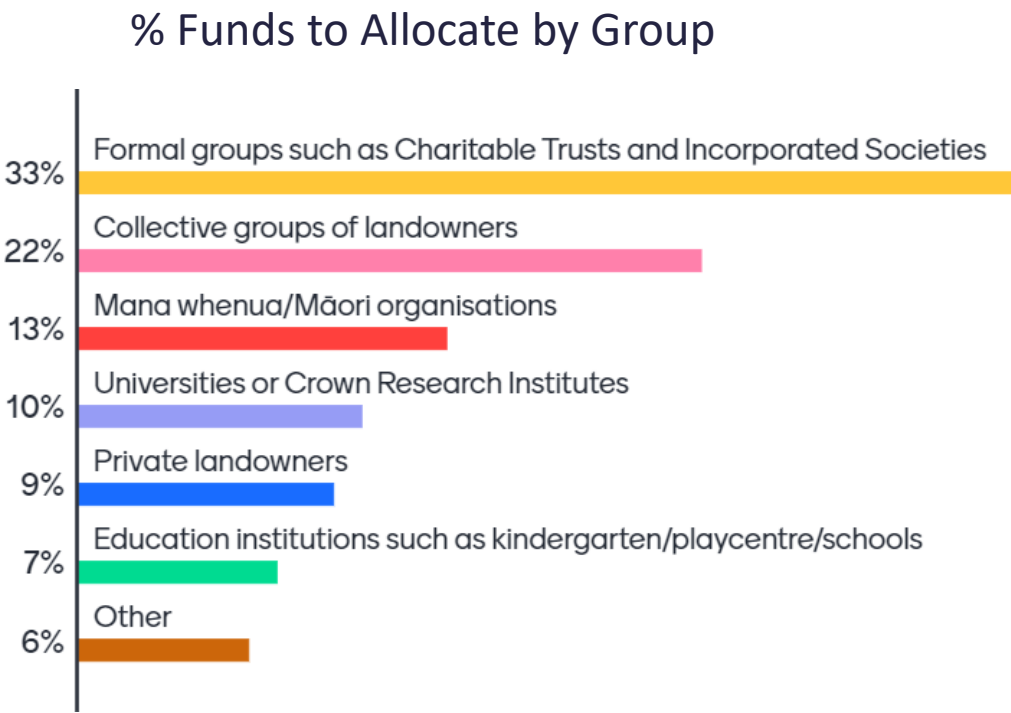
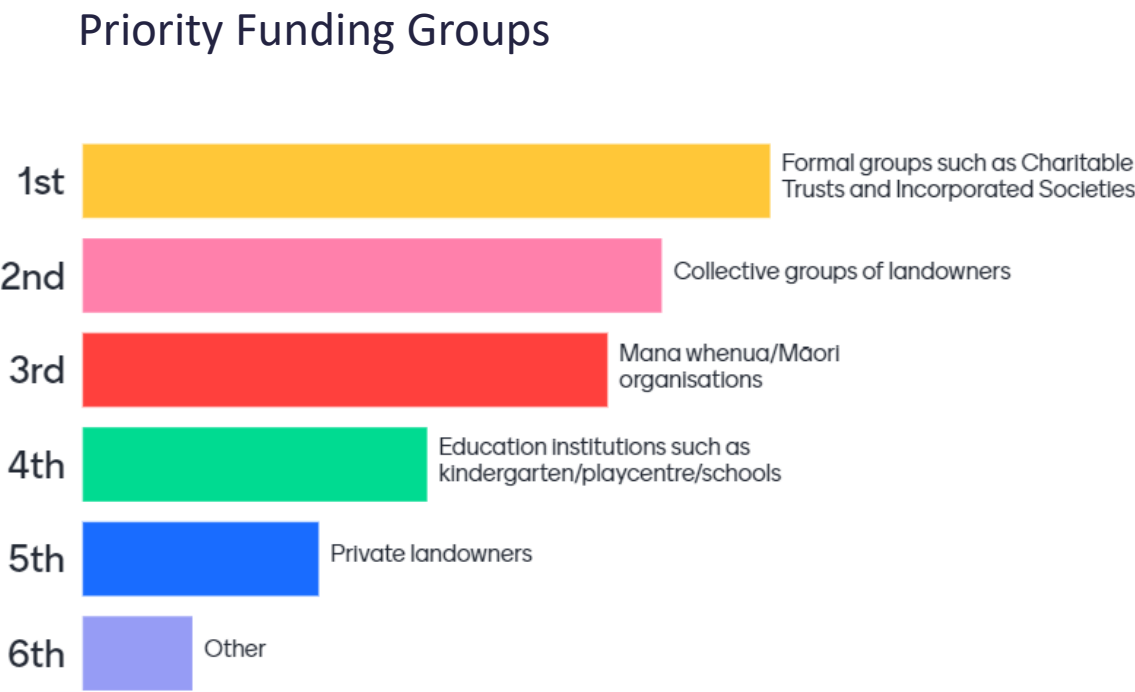
frequency

What would you like to see established?



frequency

Priority Funding Groups and % Funds to Allocate by Group



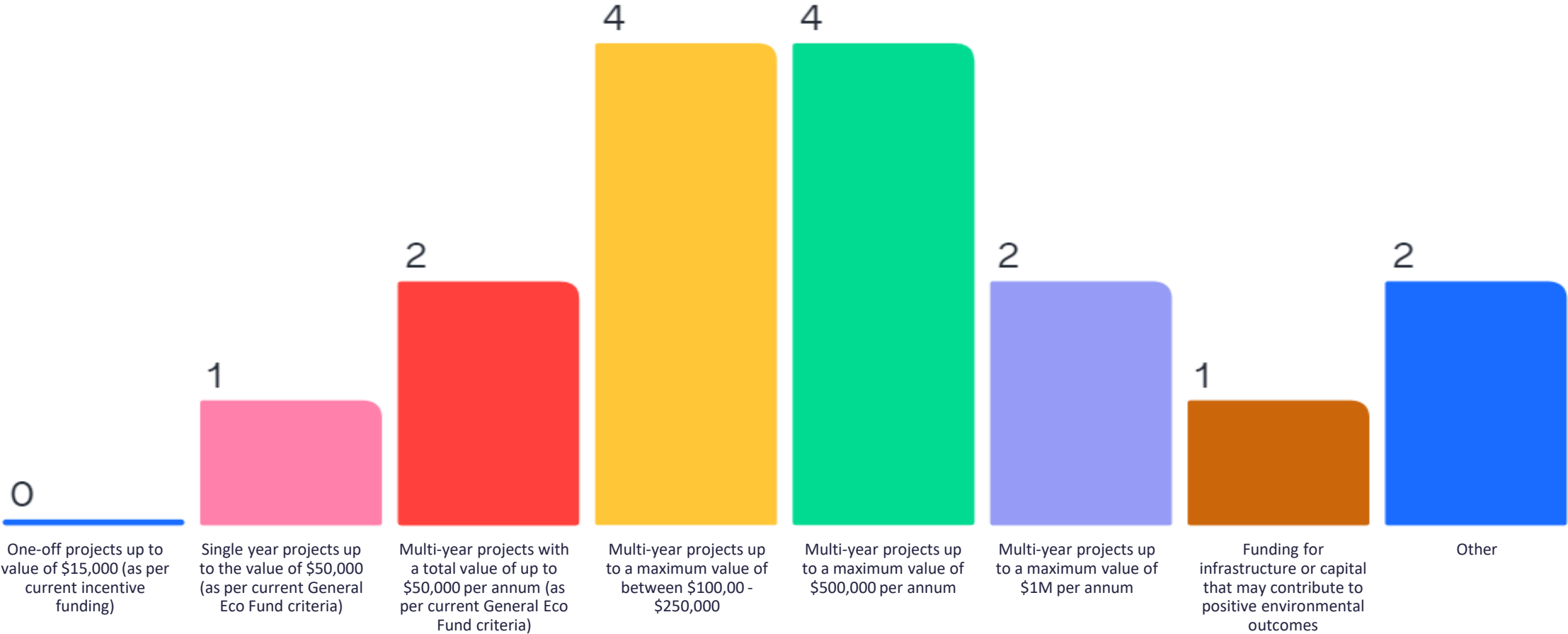
frequency

Discussion

- Is distribution by priority groups relevant or is the type of project and outcomes more important?
- Where do universities sit in the ranking of priority funding given on average 10% of funding could be allocated to Tertiary and CRI?
- Is there a level of additional comfort that comes with funding 'official' organisations or is this based on your experience of the groups that currently receive funding?
- Is there anything here that surprises you or you feel is inconsistent with other answers or views?

frequency

What does ‘large scale environmental projects’ mean to you?



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frequency

Discussion

- There's reasonable distribution in the results here (noting you could pick up to 3 answers)
- Shows an interpretation that large scale sits somewhere between \$100-\$500K of funding per project. Does this still feel right given the other results you've seen?
- Should our definition of 'large scale' be based on monetary investment or environmental impact?

frequency

Unsolved Issues and questions that need addressing



frequency

Agreed Actions



frequency

Next Steps

- Engagement with mana whenua
- Engagement with stakeholders
- Further analysis of current model and possible options and structures (including case studies)
- Timeline for completion of a draft Report end January 2025 to ORC staff
- Proposed report and workshop with Councillors March 2025

frequency

Thank you
Nga mihi nui



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Appendix 4: ORC Councillor Workshop 1 – Pre-reading and Survey



Environmental Funding Strategy Pre-Workshop Survey

Otago Regional Council



Pre-Workshop Questions

Please answer the following questions based on your opinion, while keeping in mind the vision for the region (as set out in the ORC Strategic Directions), and the current scope of environmental funding initiatives (which includes biodiversity, biosecurity and water quality).



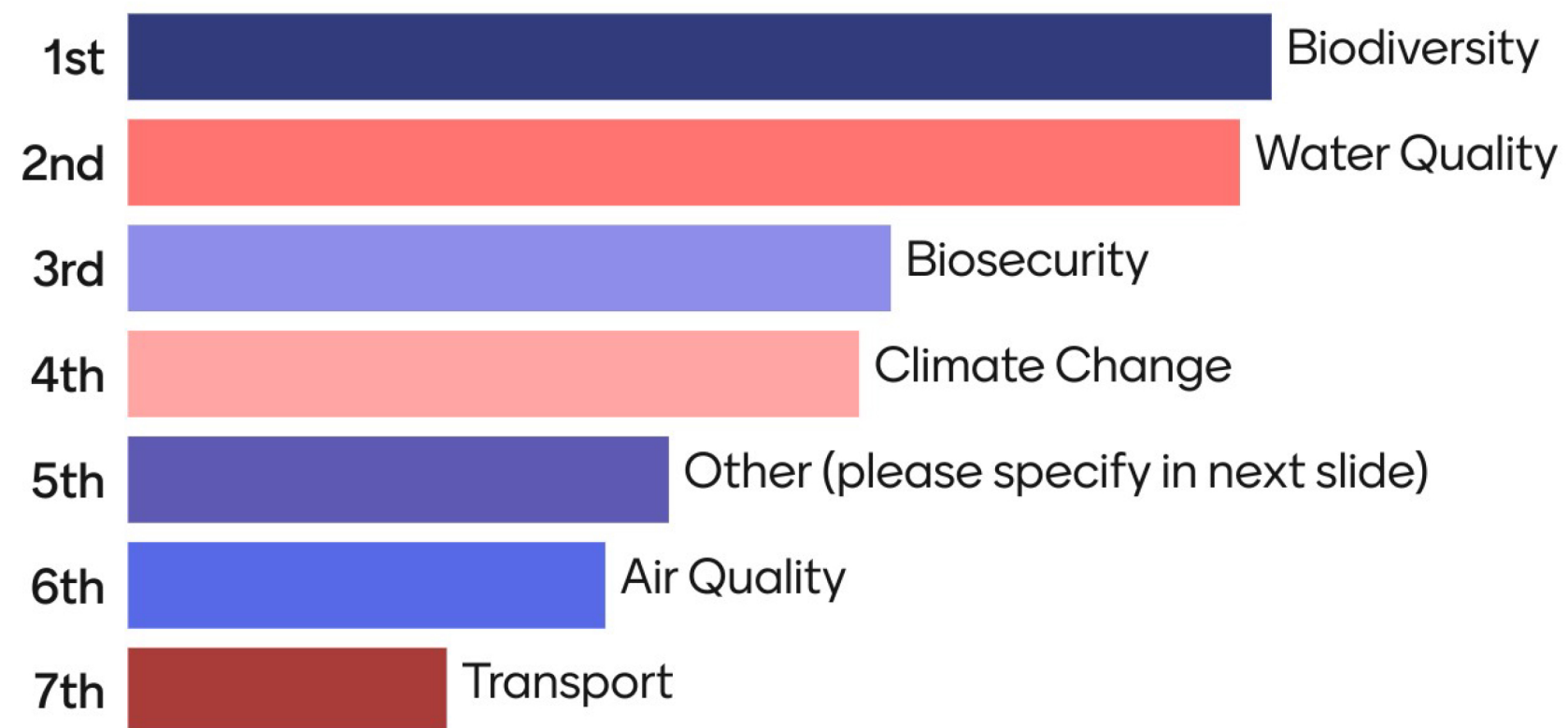


Section 1: Strategic Direction and Outcomes

Our vision for Otago



Question 1a: In your opinion, what environmental challenges should Environmental Funding be addressing ?





Please outline your vision/aspirations for environmental funding?



My 5-year vision for the use, impact and outcomes of this funding and investment is...

Funding is spread across all of Otago to assist community groups to achieve environmental outcomes. Funding of both large and small projects. Priority to protect existing good water and biodiversity

Second priority smaller project creating awareness. Third promoting mitigations eg sed traps, bunds to reduce contaminant discharge, then creation of new initiatives

Coherent plan of where to put resources i.e. priorities clear Cooperation & empowerment of local groups Devolved decision making from ORC to sub-regional (umbrella) groups

Cooperation & empowerment of local groups Devolved decision making from ORC to sub-regional (umbrella) groups

Focussed & effective action on priorities e.g. identified pest species

Well-funded, community-led protection and restoration of indigenous ecosystems ki uta ki tai. ("Other" re the last question is mahika kai and other mana whenua values)

Investment in empowering communities to do good things informed from our priority framework. Sometimes the actions needs to be visible, not always in best needed place- but ICM work will drive that.

Each fmu will have different priorities - depending on issues and its vision Fund to improve septic tanks or fire improvement should be considered



My 5-year vision for the use, impact and outcomes of this funding and investment is...

This is seed funding not all funding - should be looking at &1:\$3 ie 1/3 funding max in general

Support for community led initiatives that repair environmental damage, restore natural environments and protect endangered species

Ongoing improvement environmental wellbeing. Empowering catchment & community in general, helping to stop further degradation

Helping stop further degradation

Funding should predominantly be seed fund to get projects underway & encourage communities to take action.

Need to be careful initiatives don't have long term reliance on fund esp for paid positions

Success would see philanthropic environmental groups wanting to add to the fund to support Otago's environmental sustainability



My 10-year vision for the use, impact and outcomes of this funding and investment is...

ORC funding is the catalyst for public investment in environment funding. Otago is recognised for high quality water, flourishing biodiversity and has a plan for climate change adaptation

Improved outcomes re biodiversity, biosecurity, water quality, air quality - including on some specific issues

Same as 5 year vision, but biodiversity values, water quality, etc are all even more improved and an even wider area is covered.

Landscape scale change - focussed on biggest gains for worst issues, but with a region wide investment

Restored wetlands and lakes (Tunaheketaka), active and successful catchment groups, improved water quality, empowered community groups working to protect endangered species and restoring native habit

Same as 5 year vision - improve enviro wellbeing, empower Catchment groups and community & stop further degradation

Success would see philanthropic environmental groups wanting to add to the fund to support Otago's environmental sustainability

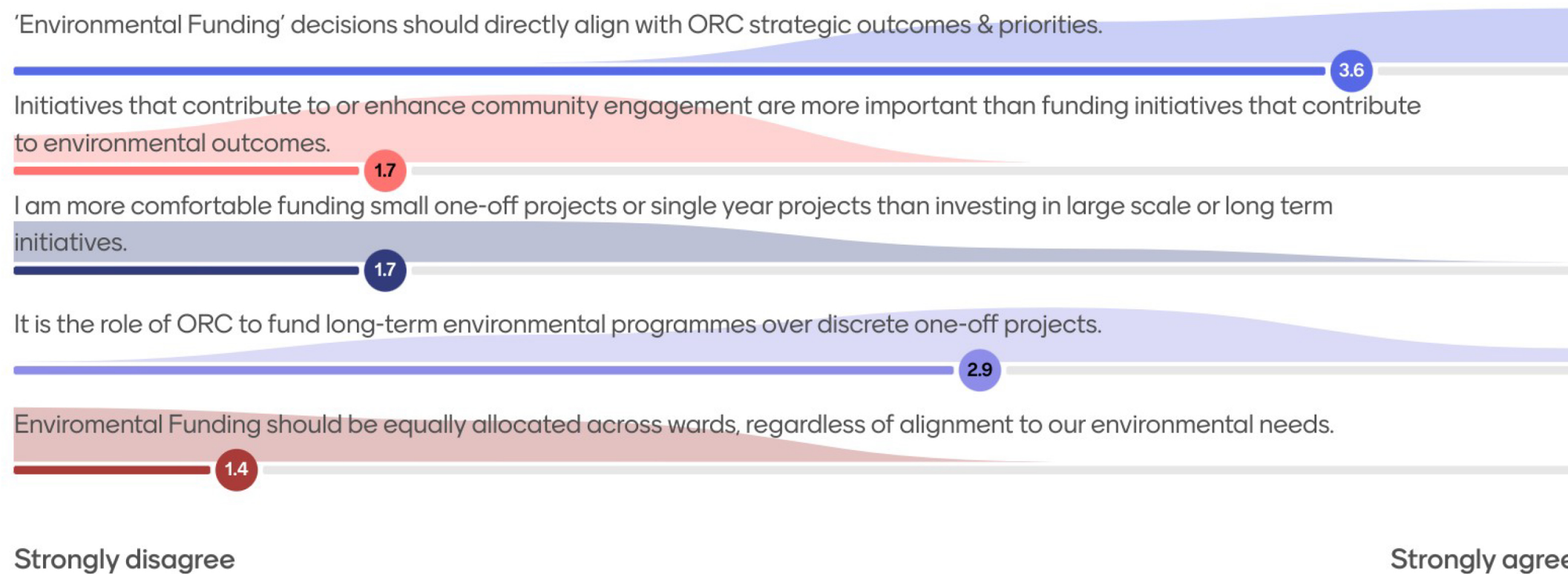


Section 2: Funding Intent, Outcomes and Structure

Environmental impacts are long-term and not always easily attributable to the investment in one project or programme. They take time, significant resources and behavioural change. While \$4M can be considered a small investment for the level of change required, it is also a considerable sum of rate payer funding to contribute to environmental initiatives that may or may not have an impact on the achievement of environmental outcomes. The following statements are to assess your level of agreement with the intent and level of outcome and impact you wish to see from this funding. They are not exhaustive but will be used to prompt further discussion and debate in the workshop.



Please rate your level of agreement with the following statement



Please rate your level of agreement with the following statement

In current ECO Fund criteria, applicants can apply up to 50% of salary costs for project delivery. ORC should continue supporting these costs.

3.1

The purpose of Environmental Funding is to give groups a 'hand up' not a 'hand out'. Projects we support need to be sustainable past 3yrs of funding.

3.0

In future, we should increase our investment in initiatives that enhance environmental outcomes on private land.

3.0

In future, ORC should investigate other funding 'pots' such as offering scholarships to support environmental research.

2.6

I am comfortable with the level of accountability the Council receives from our investment & we receive value for money.

2.7

Strongly disagree

Strongly agree

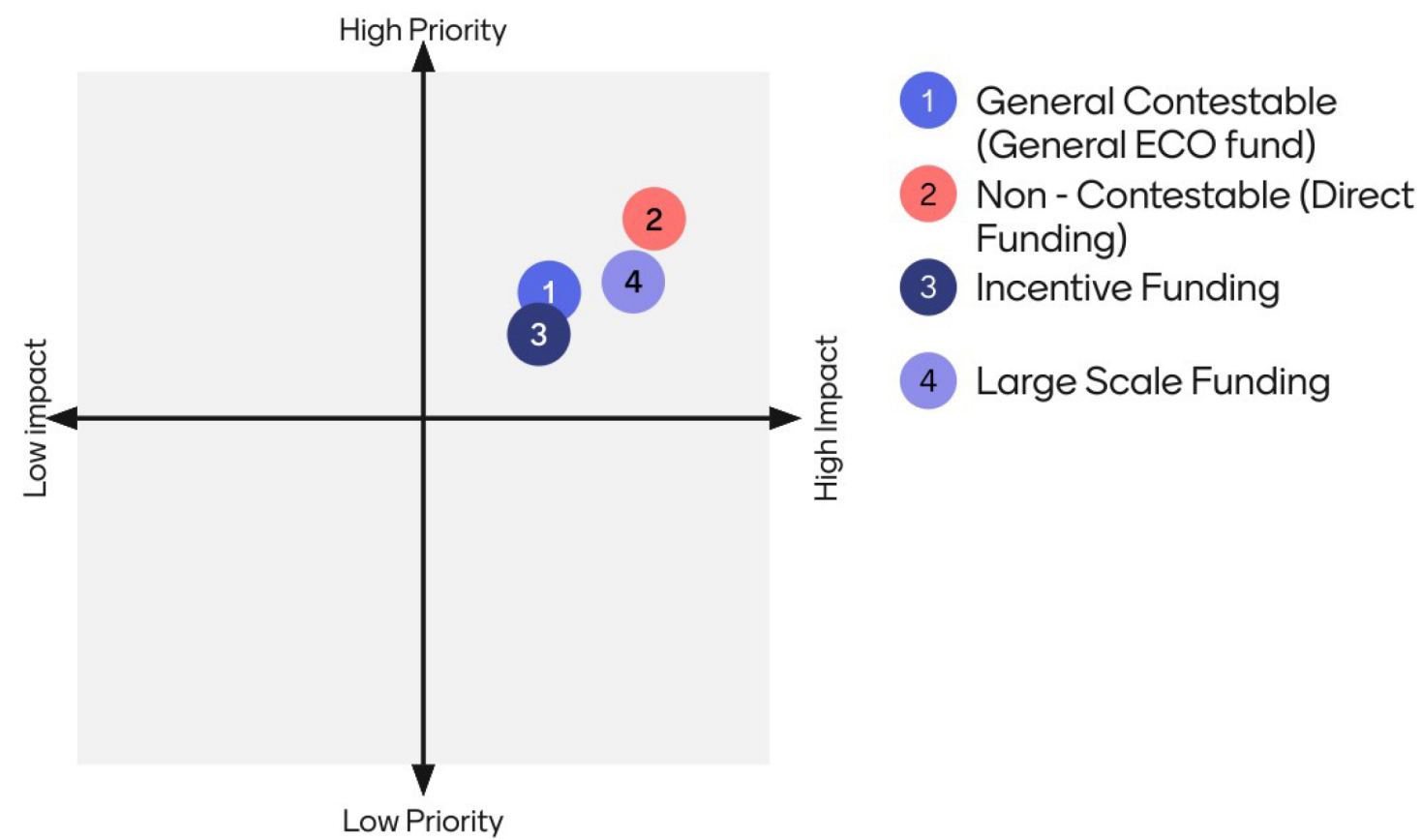


The way we fund Environmental Initiatives

Reflecting on your answers above, and the level of agreement to each of the statements, the next series of questions asks for your thoughts on a few of the areas in more detail about how and who we fund

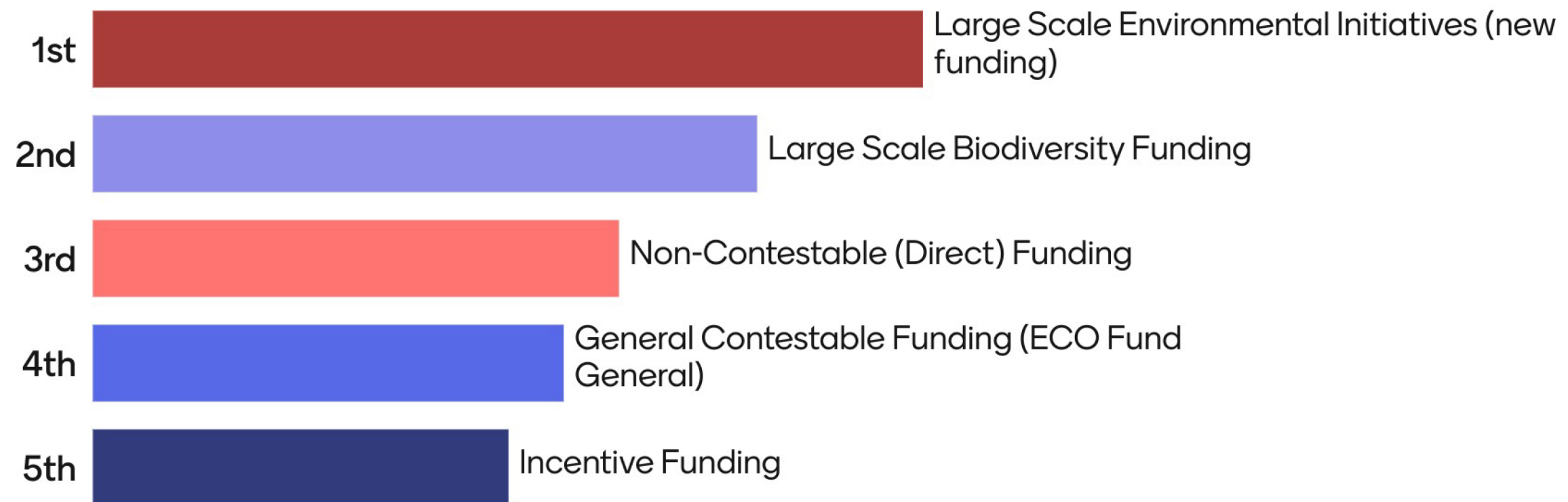


In your opinion, what level of priority and impact do you give to each funding type

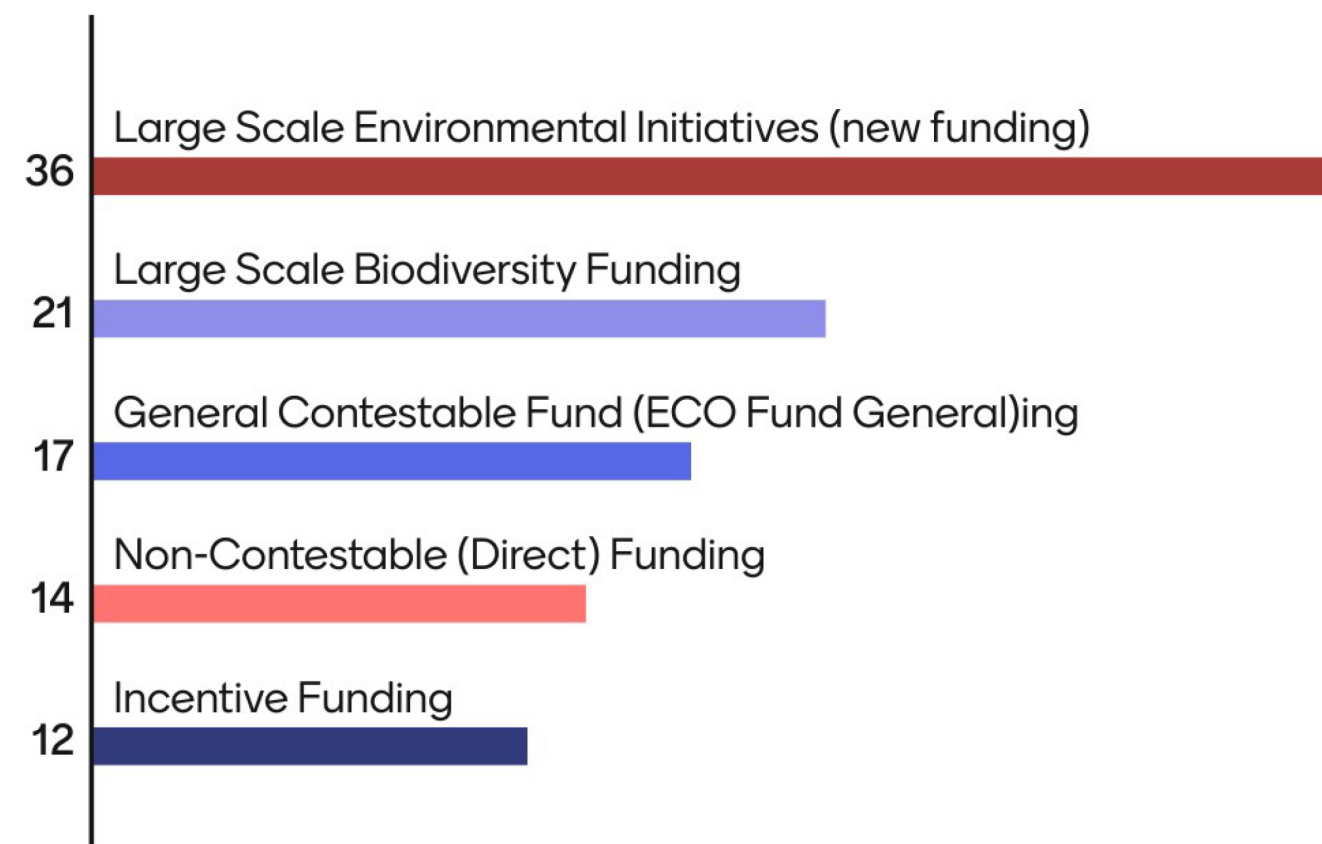




Of the funding available, please rank these in order of importance to you (based on existing or possible 'new pots' of funding).



Based on your answers in the previous question, how would you allocate funds by % of funds available?





Please provide a short explanation for your rationale.





Please provide a short explanation for your rationale.





Are there types of environmental initiatives you don't think are captured in the current funding 'pots' that you would like established?

Home insulation & clean home heating

I do think the incentives funding pools could probably be incorporated into the general competitive funding (with alignment to those incentives scoring higher points perhaps.

Septic tank and or indoor fire replacement fund to assist a cost neutral for transition using rates mechanism to pay over 2-6 years

Access easements in riparian planting or setback areas - iwi or general

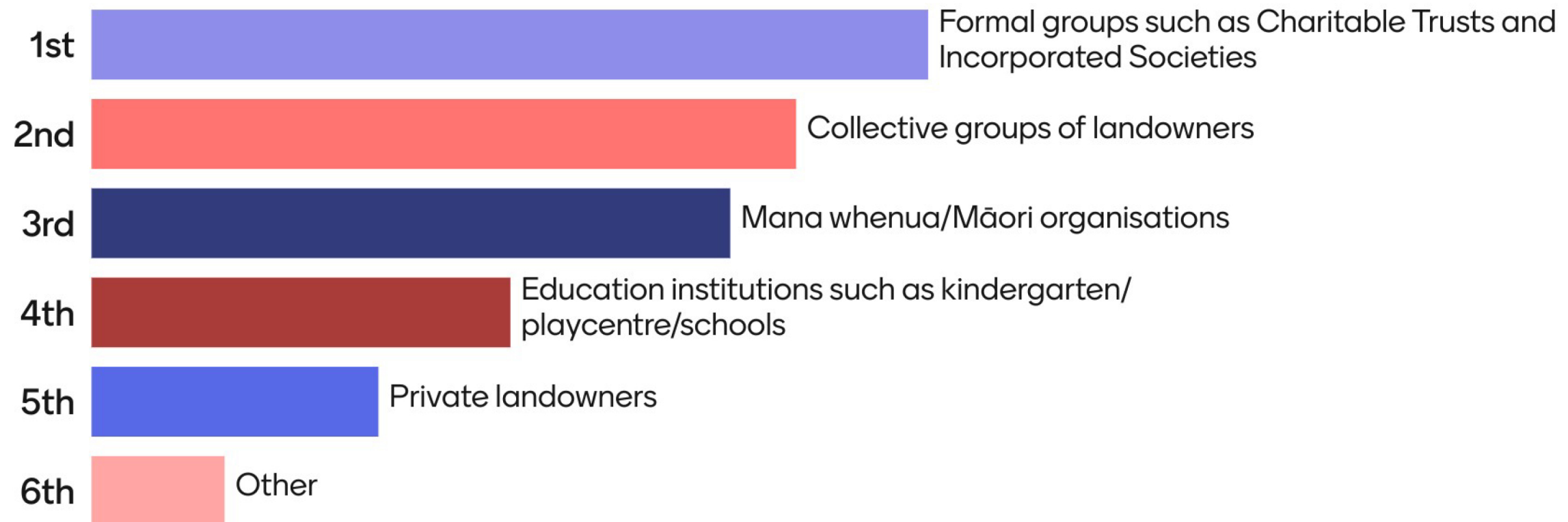


Who we Fund

Contestable Funding is currently available to a wide range of community groups and organisations such as schools, charitable trusts, incorporated societies, as well as collective groups of landowners. Incentive Funding is available to individual landowners, and direct funding is to a mixture of larger and smaller organisations such as Otago Catchment Communities.



Please rank in priority order what groups you believe should receive environmental funding?

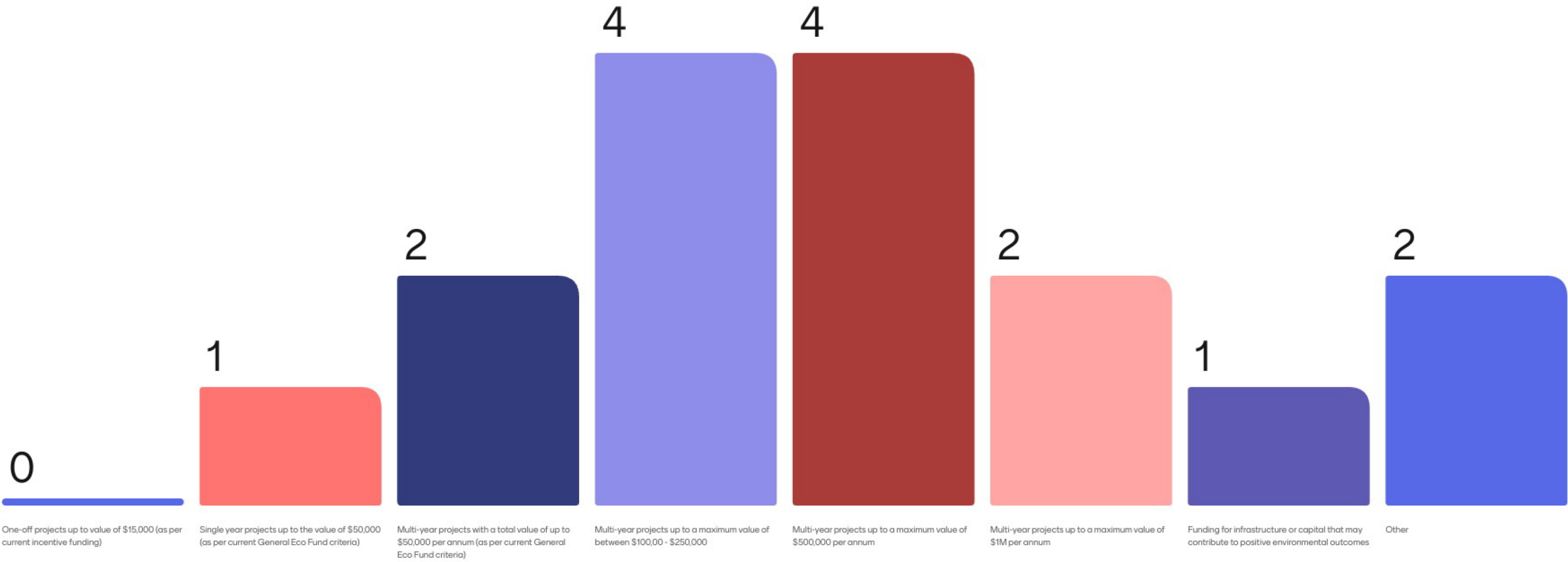


Based on your answers above, how would you allocate funds by % across the different groups eligible to receive funding?





The Council’s resolution was the allocate \$2M to “large scale environmental projects”. Large scale means the following to you. (choose up to 3)





The unresolved questions I have, or other challenges or issues I would like this workshop to address include:

Options to use ORC funding as a catalyst for attracting external funding to build the pool of funds for environmental enhancement

How we can make it easier for community groups with limited resources to access this funding (applying can be challenging and there are some unnecessary hurdles I think)

How we can create efficiencies and connect groups. eg. provide shared resources for these groups (physical tools, staff expertise, a space to store things, connections with nurseries, etc)

Large scale is important - not the funding need or mechanism. We need projects to be focussed on big picture stuff - unless area eg bats is discreet

Should consider funding for opex in question 4.3

Max value of project shouldn't determine eligibility. Funding for infrastructure etc yes. Rest options for last question don't rate



Appendix 5: ORC Councillor Workshop 2 – Pre-reading



frequency

Purpose of the Pre-Reading Pack

The purpose of this information is to give a detailed level of content prior to the workshop, including :

- Detailed feedback and commentary from the stakeholder engagement work to date, which includes discussions with
 - other local authorities in the ORC boundaries,
 - other Regional Councils, Unitary Councils and local authorities nationally,
 - central agencies and
 - environmental delivery organisations
- Detailed information on what the research and evidence says about ‘large-scale’ and the feedback we had from others on what ‘large-scale’ means to them
- Detailed information about the possible funding models, their features and SWOT for each
- Pose key questions for your thought and consideration prior to the workshop that will help inform our assessment of each model
- Allow you to form your own view and opinion (from the information provided), where each model ranks against a Risk, Value, Cost and Effort Matrix which will drive the further discussion – getting us to the point of resolution on the model/s for further investigation
- Note that both documents can be read together, although the notes are standalone (and therefore may be covered in both the reading and slide deck)

frequency

Instructions to Prepare for the Workshop

To set us up for success, and to reach a point of agreement in the Workshop, we seek the following:

- Read and review the documentation and notes provided in this page
- After reading the information on 'definition's please create your own thoughts and bring these to share
- Under each of the funding models, review the questions and answer these against each model and bring your thoughts to share
- Rate each option against the Risk, Value, Cost and Effort Matrix, using the definitions and guidance provided – we will share these and reach an agreed position on each
- Allow you to form your own view and opinion (from the information provided), where each model ranks against a Risk, Value, Cost and Effort Matrix which will drive the further discussion – getting us to the point of resolution on the model/s for further investigation
- Note down any 'burning questions' you may still have that you would like the workshop to resolve

frequency

Intended Outcomes of the Council Workshop

By the end of the workshop, Councillors will:

- **Understand what evidence and best practice tells us** about how to invest to support and achieve environmental gain
- Have a greater understanding of how this **fund and funding mechanism could impact** local TA's, community stakeholders and other funders
- **Discuss a definition of 'large-scale'** and the high level criteria that will form this definition from the Otago context
- **Discuss on the ideal long-term aspiration** of the Council for the future model of funding – determine the 'end game'
- Understand the **implications and timing of the implementation** of the large-scale fund in relation to the ORC Biodiversity Strategy refresh
- Be more **familiar with the range of funding mechanisms available**, their strengths and risks, the potential long term impacts and considerations, and insight into how the model is currently working in practice
- Identify and **agree a short list of funding model options**, based on an assessment against risk, value, cost and effort, that require further investigation for the final report to be presented to Council in May 2025.

frequency

Understanding what the evidence and best practice tell us

A summary of the key themes from our review of
the research

frequency

Effectiveness of Contestable Funding

- Can foster a level playing field, allowing smaller, newly established groups to compete for funding opportunities in a transparent process
- Inherently competitive and can stifle collaboration among organisations
- Incredibly time and resource-intensive on both the funder and the providers
- Negatively impact staff retention and contribute to organisational sustainability given short-term nature, and if salary costs are not covered
- Can drive providers to alter their delivery to funding criteria over delivery against need
- Usually very project based, with 'new' initiatives given priority over maintenance of BAU activities
- Limited communication and support can be given between provider and funder to protect process transparency

frequency

Effectiveness of Direct Funding

- Greater ability for collaborative strategic long-term plans and goals to be developed in partnership between funder and provider
- Reduced administrative time and effort compared to contestable processes
- Funders can engage directly with groups or providers to address priority environmental objectives, and encourage/guide collaboration
- Smaller, newer groups, or less well-known groups may be disadvantaged
- Potential loss of transparency in the process if decisions are based on known providers, or due to individual relationships
- Can contribute to reputational risk if some groups are directly approached and others are missed out completely

frequency

Effectiveness of Investing to support partnerships, capability and collaboration (enhancing the system)

- Aligning investment with larger groups or umbrella type organisations has a number of benefits – such as greater efficiencies across entity and leveraging additional investment
- Groups can help share ideas and information, promote projects, and strengthen group identity
- There is advantage and opportunity to invest in funds to support provider sustainability and to facilitate collaboration opportunities (not necessarily through this fund)
- Collectives are still relatively new and untested, which introduces additional risk
- Collectives and groups are often geographically restricted and may not align with the ORC region.

frequency

Effectiveness of Devolution (fund management by another entity)

- Can remove the administrative burden from the Council to an entity more experienced in this role but
- The admin costs of a third party can be significantly higher, depending on systems and processes
- Makes Council a step removed from the funding and decision making processes but , those knowing what is happening on the ground are then also removed
- Ability to access other funding and donation levers such as growing endowments
- Requires significant management by the funder to ensure transparency of use, and alignment to values and goals
- Usually requires additional governance structures to support management and administration

frequency

Effectiveness of Establishment of Trust or CCO Model

- Cost to establish, administer, govern and report can be inefficient depending on the level of investment
- Provides opportunities to off-set costs and gain additional philanthropic revenue
- Can remove investment decisions closer the community and future proofed in election cycles
- Provides formal structures for co-funding and co-investment
- Allows for a brand and identity away from Council, but can also create a disconnect from the strategy to the implementation (ORC to on-the-ground delivery)
- Without significant collaboration and partnership, can lead to duplication of effort and investment

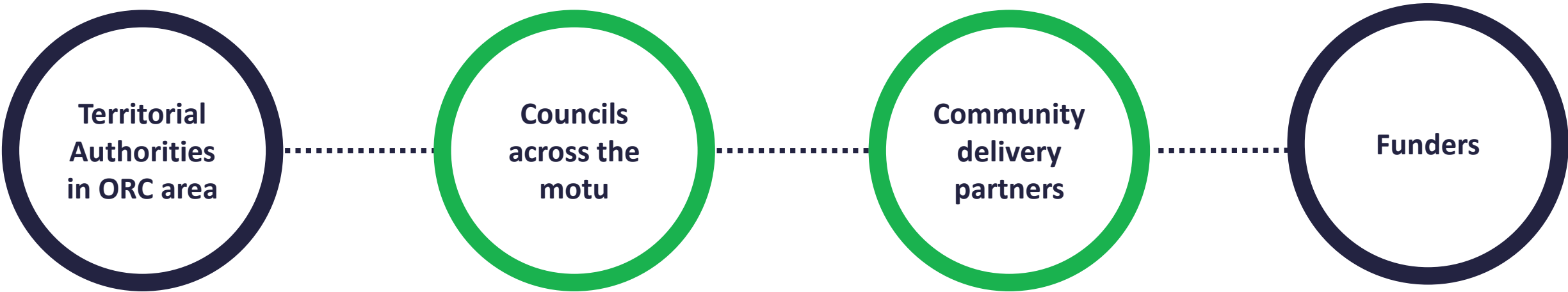
frequency

Key Themes from Stakeholder Consultation

What we have been told so far

frequency

Stakeholder Engagement



frequency

Territorial Authorities in ORC Region

- All Councils consulted with (except Clutha DC) with representation from many staff and teams. Very engaged and supportive of this project
- It is not clear what large-scale means in the Otago context
- The contestable funding process places a significant administrative burden on council staff, especially when funding is over-subscribed and grant size is small
- Councils are often not well informed about initiatives happening in other districts and there is likely duplication and gaps in what is being funded
- There is a lack of research and monitoring data to support if the gains made are sustainable
- Other funders are investing in the same providers and projects that Council's are investing in, and there is a need for a more strategic approach
- Providers are really struggling in the current financial environment & concern that this could be perpetuated depending on the funding model

Key Themes:

- Region-wide funding strategy needed
- Data and evidence still evolving
- Investment decisions would ideally come following Strategy
- Investment focused on outcomes and intergenerational gain important
- Investing in the wider 'system' is equally important as investing in activities
- The environmental issues across each TA are vastly different, as is provider capability

frequency

Other Council's across the Motu

- Range of discussions across City, District, Regional and Unitary Councils
- Many have been on a journey to evolve their funding and grant processes and models for some time, with many models being tested
- Impact has been amplified where Council's have been able to prioritise collaboration or fund collaborative activities or umbrella entities
- There is a move away from short term, contestable funding processes due to their sustainability, over-subscription, limited connection to outcomes, and high admin burden
- There is a lack of research and monitoring data to support investment prioritisation and to know if the gains made are sustainable
- There's no one-size fits all funding model – is the all dependent on the risk appetite of Council, the availability of providers and funders in the region and dependent on the capability and capacity of providers
- Implementing collaborative and connected funding processes is easily for unitary councils where roles and responsibilities are expanded and reduced complexity

Key Themes:

- Strategy & evidence before implementation
- Strength of partnership and collaboration is key
- Know the opportunities and constraints in your region and act from there
- It is a long process to evolve – some of the current models and initiatives have been in place 10+ years

frequency

Community Providers and Delivery Partners

- Range of discussions with community providers across the region
- Short-term competitive funding cycles are the biggest constraint to achieving impact and outcomes and retaining staff
- Having clear definitions and criteria are key to knowing what is priority to ORC and what will be delivered
- On the ground delivery is enhanced by strong relationships at funder level (Councils and other funders) and through collaboration on the ground
- Collaboration is more challenging in a competitive funding environment
- Variances in funding timing, requirements, criteria and accountability requirements is confusing and draining valuable resources
- Activating volunteers effectively is impossible without paid staff to support delivery
- Most receive funding from multiple sources – often from multiple Councils
- Obtaining funding to maintain existing delivery, support education and PR, and to evaluate effectiveness very hard to secure

Key Themes:

- Providers will need time to scale up and consolidate for new investment
- There needs to be clarity of what ORC wishes to purchase
- Regardless of the funding model, providers need leadership and ongoing support to be effective
- Competitive funding models are largely ineffective and not foster collaboration
- There are a large number of organisations trying to achieve the same thing creating both duplication and gaps within the system

frequency

Current and Future Funders of Environmental Initiatives

- Their investment decisions are usually driven by donor requests and the parameters of a bequest
- Their constitution or strategic plan directs where and who they will invest in – and environmental investment may not be a high priority
- There is an inherent risk for these entities to partner with Councils
- Partnering with another entity or co-funding still attracts an administration cost that needs to be covered
- Their level of maturity and standing in the community is linked with their ability to leverage additional funding
- Many are moving away from funding level projects to investing in ‘system level’ capability building and support for organisations

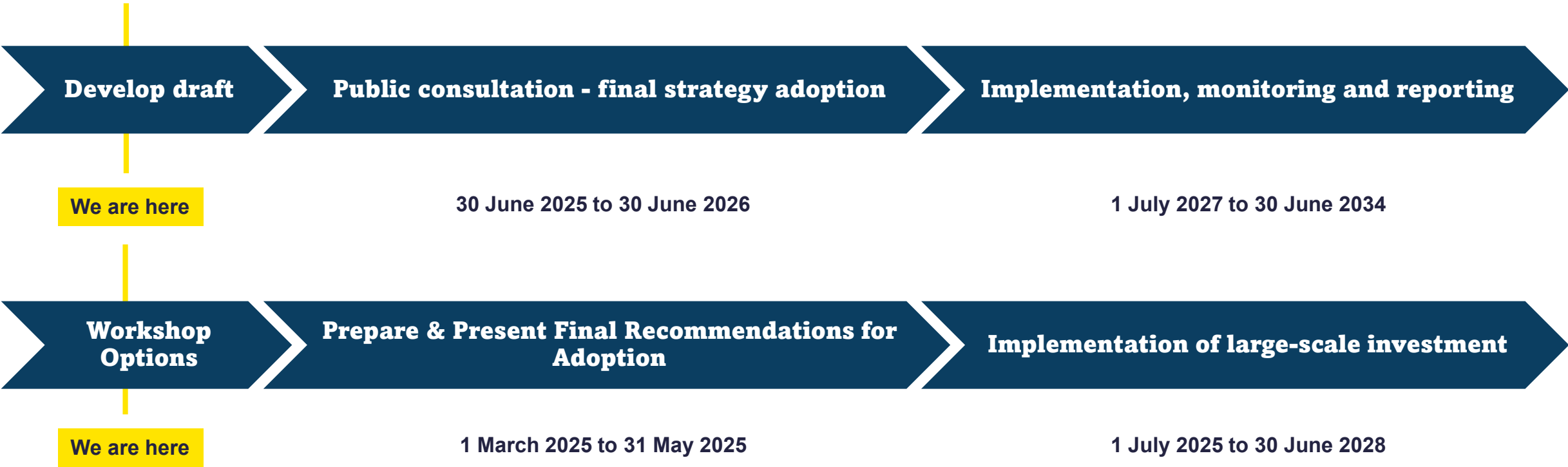
Key Themes:

- Stand alone entities have their own strategies and priorities and able to invest in areas of their choosing
- The willingness and ability to partner is very dependent on the entity, their level of maturity and mandate
- Aligning geographical coverage is challenging
- Significant deliberate push to better align funding decisions across Councils and community funders in many areas (within and outside the environment sector)

frequency

Alignment and Timing in relation to the ORC Biodiversity Strategy

- Intent of the Strategy is to align collective biodiversity outcomes for Otago with the ways we’re going to achieve them, in alignment with the NPSIB (2023)



frequency

Defining Large-Scale

Definitions from the evidence and proposed definition for ORC

frequency

What is large-scale?

- Basic definitions – broad, involving many people, extensive, wide-ranging, global
- No clear definition of ‘large-scale’ exists – from an environmental perspective or more generally
- The interpretation of large-scale is highly contextual
- There are many variables that can inform the definition of large-scale
 - Spatial scale – from regions to global scale
 - Time scale – from years to decades to inter-generational
 - Biological scale – level of biodiversity complexity such as entire ecosystems
 - Evidence scale – the level to which a project or initiative is deemed a biodiversity priority backed up by data and evidence
 - Implementation scale – the size of the group or organisation leading the change
 - Collaboration scale – the level of community activation and collaboration across groups and volunteers, including involvement of mana whenua
 - Financial scale – not only level of investment, but co-investment and partnership investment

frequency

By comparison, what is landscape scale?

- Again, no clear agreed definition of what constitutes landscape scale
- Premise that spatial configuration of landscape has profound effect on ecology and biodiversity found within
- Landscape scale is complex and occasionally contradictory
- Consistent wording in definitions usually relate to
 - Interconnected landscapes with many land uses and ecosystems present
 - Large geographical areas
 - Multiple benefits including environmental, social and economic
 - Multiple stakeholder interests
- The 'right scale' depends on the features of the landscape, the people and groups of people involved, recognition of cultural features and ownership of the land (such as protected land vs private land)

frequency

What others told us
‘large-scale’ meant to
them



frequency

Some concrete examples – ‘large-scale’ definitions and criteria already in place

Auckland Council

- Channel direct funding streams into their ‘large-scale’ initiatives
- For a project or programme to be seen as large-scale, the following conditions need to be met
 - multiple land tenure,
 - community led,
 - mana whenua connected,
 - Funding and incentivizing organisations that serve an umbrella function
- Their definition of large-scale is starting to move towards those groups who can start to take on delivery roles and responsibilities that Council would have traditionally tried to deliver on, but where they’re better placed to provide.
- AC supports these groups to by investing in their capability and capacity to ensure they are able to deliver great work in line with Council policy.

frequency

Some concrete examples

Waikato Regional Council

- Large-scale definition has six components including:
 - Landscape scale
 - Community led and collaborative
 - Involvement and support of mana whenua
 - Long-term and inter-generational benefits
 - Co-funding
 - Landowner support and permission
- Each component has a range of elements that make up that part of the definition
- Initiatives/programmes/providers must meet at least one element of each component, except 'community led' where all elements must be demonstrated

frequency

Proposed Definition for ORC of ‘large-scale’

- No one single definition is likely to be effective at encompassing all important elements
- A high-level definition is proposed (for governance purposes) with
- More detailed criteria explaining the application of the definition at a management/operational level
- The recommended criteria will be included in the final report

frequency

An Example of a Detailed Criteria Against Definition

This will need to fall under the definition, and some elements could include:

- Contribution to ORC priorities as outlined in the Biodiversity Strategy, and environmental priorities of the TA partners in the region
- Alignment with intergenerational aspirations of mana whenua, and level of support received by rūnaka
- If the programme is existing, and evidence of its effectiveness and impact
- Allowing for increased scale and/or impact, with providers demonstrating they have the capacity and capability to deliver at increased scale (such as financial and governance stability)
- Community-led with a high degree of collaboration at all levels
- Investment will be made to a legal entity
- Investment will be a minimum of three-years
- Investment is contingent on co-funding, or being on a path to co-funding
- The value of investment is contingent on how effectively providers achieve against the criteria

frequency

Some options we created – what are your thoughts?

Option 1

“Initiatives or programmes that address environmental challenges across a significant geographical area or ecosystem (as defined in our Biodiversity Strategy), and that have the goal and outcome of achieving landscape-scale or ecosystem-wide improvement. We will align our investment to work that has a high degree of coordination and collaboration at a community level, is backed by evidence, and can be sustainable, past the term of ORC investment”

Option 2

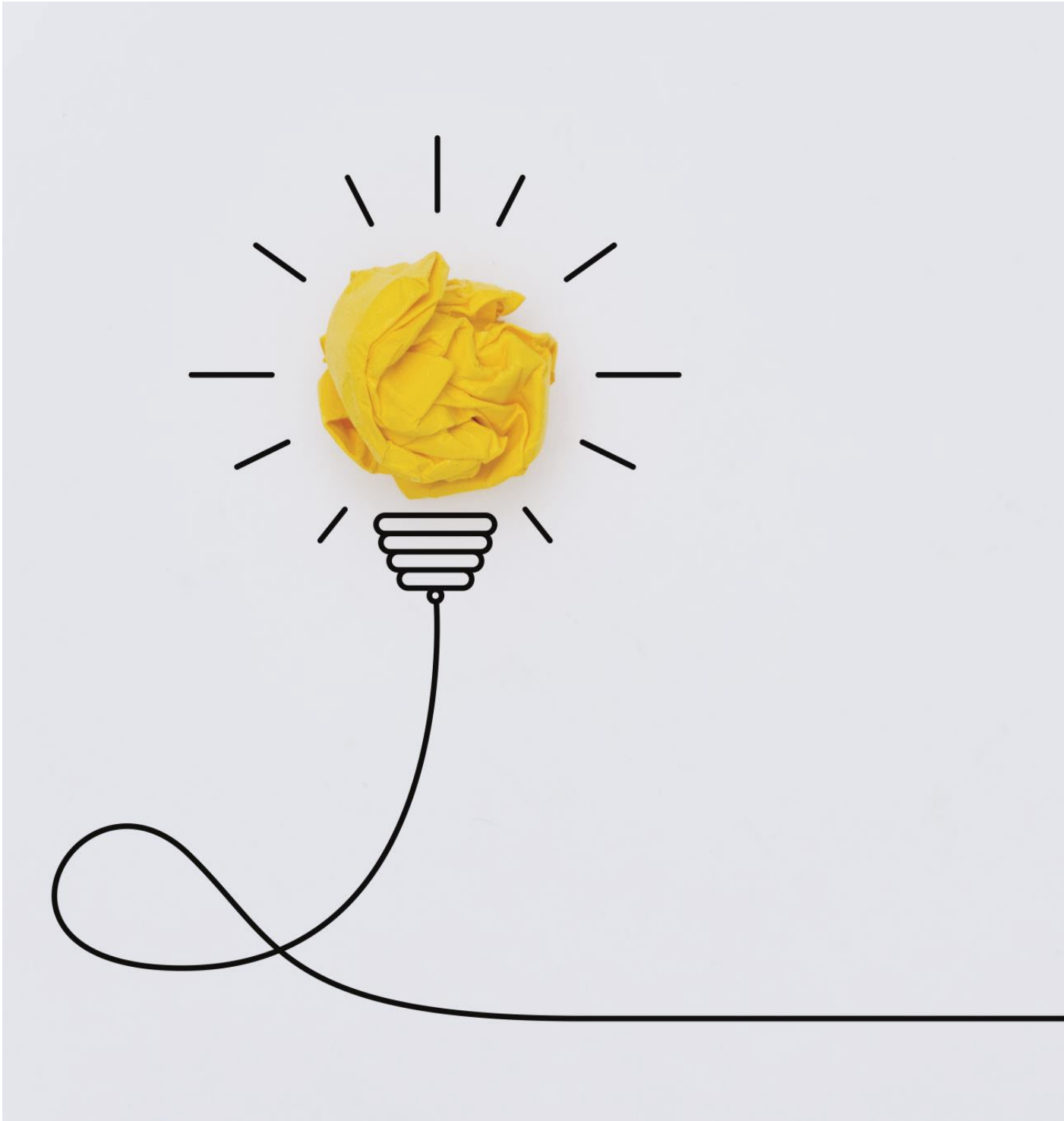
“Initiatives or programmes that will contribute to intergenerational enhancements in our environment, having positive outcomes at an ecosystem level in the areas of biodiversity, water quality, ecosystem restoration and climate change mitigation. We will align our investment to our strategic priorities and the priorities of our mana whenua partners”

Option 3

“initiatives or programmes that can achieve intergenerational outcomes at ecosystem or multi-ecosystem scale, that are community-driven, backed by evidence and science, supported by mana whenua and that enhance engagement and activation at a community and funder level.”

frequency

What does your definition look like?



Creating a thriving Aotearoa for future generations

Council Meeting - 25 June 2025

frequency

Funding Model Discussion

Discussion of six possible options and agreement on preferred models for further investigation

frequency

Instructions for Assessing the Funding Models

- This section outlines six models for discussion. It also contains information on the ‘other’ models we found, which are slight variations on the core 6 models.
- Each model is outlined by it’s overall features, the timescale to implementation and an analysis of the strengths, opportunities, weaknesses and risks.
- Please review the content, and then note your thoughts on the questions we pose as part of each model.
- Then we ask, using your own judgement, to plot where you think each model ranks on the Risk, Value, Cost and Effort (RVCE Matrix) at the end of the reading pack.
- The notes contain guidance on how to use this matrix, and our group discussion will focus on getting alignment/consensus on the where the 6 models fit.
- We will provide A3 print outs of the questions and the consolidated SWOTs for the workshop.

frequency

Funding Models for Discussion

1.

Contestable Funding Model
(i.e. upscaling the ECO Fund)

2.

Direct Funding Model or
EOI

3.

Funding by Catchment or
Biodiversity priority/plans

4.

Administration of a Fund by
a third party
(i.e. existing Trust or CCO)

5.

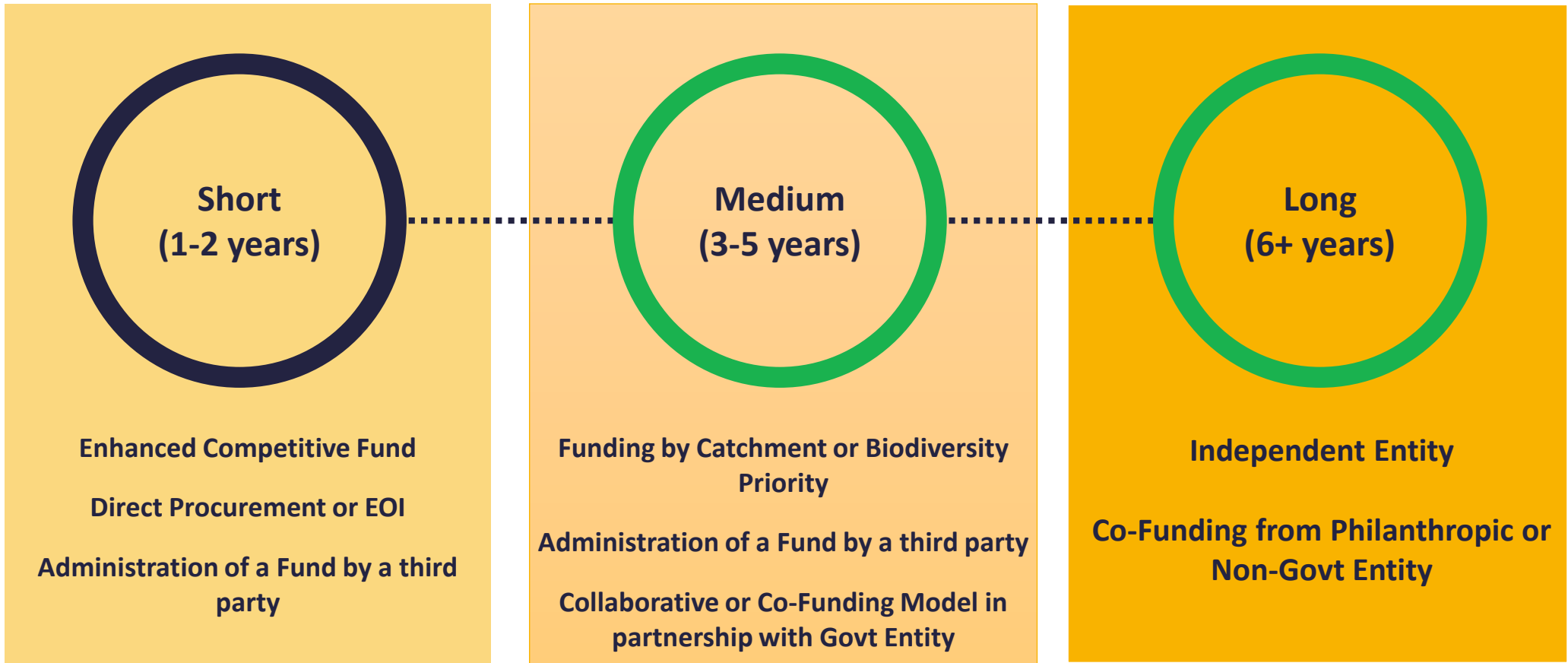
Collaborative or Co-
funding model in
partnership with
established organisations
(i.e. philanthropic or other TA's)

6.

Establish stand alone Trust
or CCO entity to leverage
and administer funds

frequency

Likely Timescale per Option



Creating a thriving Aotearoa for future generations

frequency

Funding Model 1: Contestable Funding Model

Key Features of Governance and Management (in the large-scale context)

- Management of the Fund would be undertaken by ORC internally
- Detailed criteria would need to be developed by mgmt. in line with agreed definition and fund parameters
- Allocation of project size and value dependent on detailed criteria and agreed funding cycle
- Timing of the fund allocation to be determined against internal and provider capacity
- Governance and allocation decisions could be undertaken via a panel like ECO Fund
- Delivery against agreed outputs and outcomes contractually managed between provider/s and ORC staff
- Will need to determine length of contracting and number of rounds (i.e. \$6M allocated every 3 years)

Example of the Model in Practice: Waikato Regional Council's Natural Heritage Fund

Strengths	<ul style="list-style-type: none"> • Can be administered internally as systems already in place • Implemented effectively in the short term • In the short term, can fill funding void created by JfN ending
Opportunities	<ul style="list-style-type: none"> • Examine and realign all fund types to ensure all 'needs' are met across available funding • Consistent investment can result in being able to determine return on investment
Weaknesses	<ul style="list-style-type: none"> • Doesn't necessarily ensure investment into the right place for the right project • Reduces ability for a collaborative approach between Council and communities • Internal capacity within current resourcing to effectively manage and administer • Limited opportunity for co-funding or relationship with other funders • Investment decisions made before Biodiversity Strategy completion
Risks	<ul style="list-style-type: none"> • Perpetuates the cycle of highly competitive funding • May discourage collaboration between providers • May inadvertently fuel the culture of funding 'new' projects rather than maintaining existing • Doesn't clearly foster or support long-term org. sustainability
Financial Implications	<ul style="list-style-type: none"> • Risk investing in the providers best placed, or with the resources to write the best funding applications • Investment may not be targeted to the highest priorities or the best environmental outcomes • Will need to decide number of rounds and length of investment (i.e. \$2M annually, or \$6M allocated for three years) • Contestable funds are expensive to administer • If this is a short-term measure, the length of investment needs to be long enough for benefit to the provider and community
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • Contestable funds are incredibly resource intensive to effectively manage and monitor • Timing of the fund to either align with, or different timing to the current ECO Fund processes • How evaluation or review of performance may be undertaken • Doesn't easily allow for opportunities for sector wide, or Council wide collaboration

frequency

Questions for Consideration...

1. How does this model align with our game plan? (that is what we want to achieve and the impact we want to have?)
2. Does this 'model in action' align with your definition of 'large-scale'?
3. If we use this model, how will we know if we're 'winning' or working towards achieving our impact/outcomes?
4. Is there anything missing from the identified strengths, opportunities, weaknesses and risks identified?
5. Are there any surprises in this or the financial and operational considerations we've outlined?
6. What is the level of cost required to get this model up and running effectively (low vs high)?
7. What is the level of effort required to get this model up and running effectively (low vs high)?
8. What the level of risk that this model presents and is this appropriate within the context of what we're trying to achieve?
9. Does the level of effort required (from us internally and from our providers/community/partners) warrant its further consideration (low vs high)?

frequency

Funding Model 2: Direct Funding or EOI

Key Features of Governance and Management (in the large-scale context)

- Management of the Fund would be undertaken by ORC internally
- Detailed criteria would need to be developed by mgmt. in line with agreed definition and fund parameters
- Allocation of project size and value dependent on detailed criteria and funding cycle
- Decisions around the type and location of initiatives funded could be Council driven and determined (as opposed to community driven and determined under a contestable model, or could be community driven)
- Providers/suppliers could be required to complete a self-assessment tool against the criteria to determine suitability to apply (pre-procurement process to get to the start line)
- Timing of the fund allocation to be determined against internal and provider capacity
- Governance and allocation decisions could be undertaken via a panel like ECO Fund
- Delivery against agreed outputs and outcomes contractually managed between provider/s and ORC staff
- Will need to determine length of contracting and number of rounds (i.e. \$6M allocated every 3 years)

Example of the Model in Practice: Auckland Council's Direct funding by Biodiversity Focus Areas

Strengths	<ul style="list-style-type: none"> • Can direct funding to high priority issues and ecosystems • Can determine suitable (or preclude) providers early due to the procurement process • Can be less resource and time intensive than a competitive process • Can allow for more provider collaboration during the process
Opportunities	<ul style="list-style-type: none"> • Can drive innovation and collaboration • Can enable opportunities for Council and providers to work together on long term sustainable funding options
Weaknesses	<ul style="list-style-type: none"> • Still requires significant capacity and capability internally during implementation • Can lose some transparency in the process if only certain providers approached
Risks	<ul style="list-style-type: none"> • May limit the pool of suitable providers if base assessment too heavily on past performance alone • Criteria may be too narrow and excludes some groups or communities unknowingly • Could damage relationship with existing providers or communities who feel excluded • Provider capability may be stronger in one catchment or geographical area, leading to the perception that only one part of ORC area is receiving funding
Financial Implications	<ul style="list-style-type: none"> • Risk investing in the providers best placed, or with the resources to write the best funding applications • This can be mitigated by a pre-procurement screening process, but this may result in investment into only one or two catchment areas • Investment may not be targeted to the highest priorities or the best environmental outcomes • Will need to decide number of rounds and length of investment (i.e. \$2M annually, or \$6M allocated for three years) • Contestable funds are expensive to administer (even if undertaken via direct procurement) • If this is a short-term measure, the length of investment needs to be long enough for benefit to the provider and community
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • While the procurement process may be less intensive, the ongoing management and monitoring of contracts/programmes is resource intensive • The SWOT of this model will be largely reliant on the procurement parameters and criteria put in place

Council Meeting – 25 June 2025

frequency

Questions for Consideration...

1. How does this model align with our game plan? (that is what we want to achieve and the impact we want to have?)
2. Does this 'model in action' align with your definition of 'large-scale'?
3. If we use this model, how will we know if we're 'winning' or working towards achieving our impact/outcomes?
4. Is there anything missing from the identified strengths, opportunities, weaknesses and risks identified?
5. Are there any surprises in this or the financial and operational considerations we've outlined?
6. What is the level of cost required to get this model up and running effectively (low vs high)?
7. What is the level of effort required to get this model up and running effectively (low vs high)?
8. What the level of risk that this model presents and is this appropriate within the context of what we're trying to achieve?
9. Does the level of effort required (from us internally and from our providers/community/partners) warrant its further consideration (low vs high)?

frequency

Funding Model 3: Funding by Catchment or Biodiversity Priority

Key Features of Governance and Management (in the large-scale context)

- Development of the plans would occur under the current structure and partnership
- Plans would be developed as communities became activated and engaged in the process
- Implementation Plans and budgets would follow Plan sign off
- Agreed investment would be given to a community group/entity (which may be new or newly established) or to an existing community provider or umbrella entity
- Investment would need to be for a set amount and time
- Contractual arrangements and monitoring of delivery would be undertaken internally
- A timeline and plan for investment would need to be developed and managed to ensure investment would start and stop at certain times (ensuring the fund doesn't become diluted)

Example of the Model in Practice: Catlins Catchment Action Plan (Pilot)

Strengths	<ul style="list-style-type: none"> Allows for systematic funding approach that is grounded in evidence and priority Pilot already completed and best practice approach evolving/developing
Opportunities	<ul style="list-style-type: none"> Allows for stronger alignment from strategy and data to implementation and action Develop closer on the ground relationships and collaborations with community groups to lead action More science in action initiatives May allow for greater partnership and collaboration between existing community groups/providers Can work with the willing – quick wins to be had
Weaknesses	<ul style="list-style-type: none"> Investment may not go to area of highest biodiversity need but driven by level of community engagement Likely to be only short-term investment as will dilute value and effectiveness as more plans are completed Capable providers may miss out on opportunities if community action and engagement doesn't follow Impact diluted over time as more Plans are completed Significant internal resource required to drive the process
Risks	<ul style="list-style-type: none"> May not be a suitable provider in the catchment area to hold and administer the funds on behalf of Council Community enthusiasm and engagement may wane over time Sustainability of the work post-investment if the group has no mandate or activity past the implementation of the CAP May struggle to leverage additional investment if a new group needs to be established (no history of delivery)
Financial Implications	<ul style="list-style-type: none"> Sustainability of the funding – probably can't fund all 10 catchments at once May need a lot of support to transition groups to deliver past the life of the funding (implementation plan may be very aspirational and/or inter-generational) Depending on who is funded, capability and capacity may be limited, or no formal entity to fund may exist Prioritisation and timing of the funding will need to take place, but this may not align with community readiness
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> The internal resource and capacity required will increase as more Plans are developed Additional resources will be needed to support Plan implementation in addition to Plan development Resources may become spread thin on the ground over time

Council Meeting - 25 June 2025

frequency

Questions for Consideration...

1. How does this model align with our game plan? (that is what we want to achieve and the impact we want to have?)
2. Does this 'model in action' align with your definition of 'large-scale'?
3. If we use this model, how will we know if we're 'winning' or working towards achieving our impact/outcomes?
4. Is there anything missing from the identified strengths, opportunities, weaknesses and risks identified?
5. Are there any surprises in this or the financial and operational considerations we've outlined?
6. What is the level of cost required to get this model up and running effectively (low vs high)?
7. What is the level of effort required to get this model up and running effectively (low vs high)?
8. What the level of risk that this model presents and is this appropriate within the context of what we're trying to achieve?
9. Does the level of effort required (from us internally and from our providers/community/partners) warrant its further consideration (low vs high)?

frequency

Funding Model 4: Administration of a Fund by a Third Party

Key Features of Governance and Management

- ORC would enter into a service agreement or contract with an existing entity or organisation to administer the funds on behalf of ORC – could be a Charitable Entity or Community Funder or an existing CCO (Port Otago)
- The third-party entity would be responsible for the full administration costs of the fund such as the promotion of the fund, gathering applications, convening review panels, contracting with providers for delivery
- ORC staff could/would be involved in the allocation process and decision making
- The entity would be accountable under contract for all components of the fund
- In addition, it could be a requirement for the entity to leverage or raise additional funds on top of the ORC investment, but this may be long term
- Likely in the short term, the purpose would be to develop and administer on behalf of ORC

Example of the Model in Practice: Environment Canterbury and the Christchurch Foundation (Green Philanthropy) or Destination Queenstown and the Wakatipu Community Foundation (I LOVE Wānaka and I LOVE Queenstown initiatives)

Strengths	<ul style="list-style-type: none"> • Reduces internal administration and capacity for ORC staff • Keeps the fund at arm's length from Council and can be seen as a community fund rather than Council • Third party may be more cost effective compared to Council overhead costs
Opportunities	<ul style="list-style-type: none"> • Removes Council from direct funding decisions, allowing for greater opportunities to attract co-investment or philanthropic investment , and lever charitable entity benefits • Enhance relationship and collaboration with external providers • Allows for pooling for funds from multiple local authorities to achieve greater efficiency and impact of investment
Weaknesses	<ul style="list-style-type: none"> • Portion of the funds needed to cover admin of the Fund • Investment decisions are made by those removed from the day-to-day delivery on the ground • Currently unknown if there are any existing organisations with the capacity and capability to deliver this on behalf of ORC & not currently within PO core business or strategy • Still requires significant ORC management to ensure delivery against contract and KPIs • The ability to lever additional funds or investment will likely take significant time
Risks	<ul style="list-style-type: none"> • Transparency of use of rate-payer funds is potentially reduced • Entity is too far removed from day-to-day work, particularly if environmental funding is not their core business and investment moves further away from strategy • Reputational risk if contracted entity does not effectively deliver
Financial Implications	<ul style="list-style-type: none"> • Overall investment likely be diluted by circa 10% p/a to account for administration costs which may be able to be met by other internal ORC sources • Ability (and/or appetite) of a third-party to raise additional funds on behalf of Council may be limited • May not achieve value-for-money if the entity is not capable of delivering in the medium to long term
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • Will take time to get in place, especially if no willing party comes forward or existing relationship is established • No existing organisation may have regional mandate or reach that matches ORC boundaries • Significant level of internal capacity and capability required to ensure that fund is effectively being administered and ensure alignment is maintained with strategy • Effective investment decisions may be at risk if administering this fund is outside of their core business

Council Meeting - 25 June 2025

frequency

Questions for Consideration...

1. How does this model align with our game plan? (that is what we want to achieve and the impact we want to have?)
2. Does this 'model in action' align with your definition of 'large-scale'?
3. If we use this model, how will we know if we're 'winning' or working towards achieving our impact/outcomes?
4. Is there anything missing from the identified strengths, opportunities, weaknesses and risks identified?
5. Are there any surprises in this or the financial and operational considerations we've outlined?
6. What is the level of cost required to get this model up and running effectively (low vs high)?
7. What is the level of effort required to get this model up and running effectively (low vs high)?
8. What the level of risk that this model presents and is this appropriate within the context of what we're trying to achieve?
9. Does the level of effort required (from us internally and from our providers/community/partners) warrant its further consideration (low vs high)?

frequency

Funding Model 5: Collaborative or Co-Funding Model in Partnership

Key Features of Governance and Management:

- ORC would enter into a formal agreement with another party or parties under an SLA, MoU, Shared Services Agreement or other agreement. Likely partners would be other TA's, an iwi-owned entity, or a philanthropic partner
- Funding is held by a 'host' entity – which could be ORC or another partner
- This arrangement is often used for the purposes of pooling funds to achieve collaborative outcomes – to fund a coordinator or a programme manager or to contribute to achieving shared outcomes (e.g. Regional Software Holdings Ltd – which is also a CCO)
- The next phase of this model could be the pooling of funds that are to be collectively administered for grant making purposes
- An allocation panel, representing the partners would allocate funding under their terms of reference
- The 'host' or 'lead' entity may take an administrative fee to oversee and manage the process
- All entities would collectively be responsible for the investment decisions and accountability of deliverables

Example of the Model in Practice: Biodiversity Hawkes Bay Environmental Enhancement Contestable Fund (HBRC & ECCT)

Strengths	<ul style="list-style-type: none"> • Can be built and eased into over time – from one partner to many, from pooling of funds to leverage additional funds and additional partners • Greater efficiency for providers in application process and potential streamlined accountability • Greater coordination of investment decisions • Can result in everyone ‘singing from the same song sheet’
Opportunities	<ul style="list-style-type: none"> • Potential to solidify a formal partnership with mana whenua and path to co-investment • Potential to solidify a path to formal partnership with a philanthropic entity and a path to co-investment • ORC to demonstrate true regional leadership with other local authorities and community
Weaknesses	<ul style="list-style-type: none"> • Challenge to align the environmental and investment priorities of co-funders with Council processes (or alignment across Council’s) • May require additional time and resource for ORC to act as a ‘host’ or ‘lead’ • Can mean that ORC is required to report to many ‘masters’ who may have differing expectations • Achieving alignment on funding priorities, across multiple mandated geographical boundaries can be difficult
Risks	<ul style="list-style-type: none"> • ORC value proposition will need to be strong to attract potential partners • The partnership and collaborations need to be already working in practice before becoming formalized – forced partnerships are rarely effective • Inequity in contribution can disrupt the partnership and balance of power
Financial Implications	<ul style="list-style-type: none"> • Level of investment others are able and willing to contribute • If funding available is to support collective action (such as Kotahitanga mō te Taiao) or if funding is available to support grant making/programme funding • Whether the administration costs outweigh the benefits by having a co-funding arrangement • The sustainability of the arrangement and investment (obtaining commitment past LTP cycles)
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • A long-term trusting partnership needs to be in place prior to collaborative investment coming • Timing for operational decisions may not align across entities (unless partnering with other local authorities) • Future proofing the arrangement if priorities change for the partner or co-funder • It may be difficult to find the right partner who matches priorities, aspirations and geographical reach • The internal capacity and capability required if ORC were to lead this (which logically they would)

Council Meeting – 25 June 2025

frequency

Questions for Consideration...

1. How does this model align with our game plan? (that is what we want to achieve and the impact we want to have?)
2. Does this 'model in action' align with your definition of 'large-scale'?
3. If we use this model, how will we know if we're 'winning' or working towards achieving our impact/outcomes?
4. Is there anything missing from the identified strengths, opportunities, weaknesses and risks identified?
5. Are there any surprises in this or the financial and operational considerations we've outlined?
6. What is the level of cost required to get this model up and running effectively (low vs high)?
7. What is the level of effort required to get this model up and running effectively (low vs high)?
8. What the level of risk that this model presents and is this appropriate within the context of what we're trying to achieve?
9. Does the level of effort required (from us internally and from our providers/community/partners) warrant its further consideration (low vs high)?

frequency

Funding Model 6: Establishment of New Entity (Trust or CCO)

Key Features of Governance and Management (in the large-scale context)

- Council would establish a new entity as allowed for under the LGA
- Consideration needs to be considered of the rules and requirements, their timing and cost (e.g. developing a constitution, appointing governance and trustees, appointing staff and clarifying roles and responsibilities)
- It would likely require a number of appointed independent directors, including a Chair
- This would need to be completed prior to the distribution of funding
- Management of the Fund would be undertaken by the new entity, including development of criteria and fund parameters
- Governance and allocation decisions could be undertaken by the entity, which could have ORC Councillor and staff representation
- Delivery against agreed outputs and outcomes contractually managed between provider/s and the Trust
- Until additional funds could be raised, it is likely that funds would just be transferred in and out of the entity (but with additional overhead and operational requirements)

Example of the Model in Practice: none identified as yet

Strengths	<ul style="list-style-type: none"> • Can have a separate brand and identify from Council that is meaningful and engaging for communities and potential funders • Leverage charitable benefits and additional investment • Independent governance board
Opportunities	<ul style="list-style-type: none"> • Increase the overall pot of investment in environmental initiatives • Create innovative funding and partnership arrangements • Achieve regional spread and landscape scale environmental outcomes if scale of leveraged investment allows
Weaknesses	<ul style="list-style-type: none"> • Time and resource intensive to establish and administer • Requires separate governance, management and reporting structures which all need to be funded • Additional workload and expectations on existing Councillors and/or ORC to ensure effective representation • Investment prioritized directly to community over alignment with Council/Govt
Risks	<ul style="list-style-type: none"> • Until such time as additional investment is leveraged, the model can be seen as costly, with little direct benefit to rate payers • ORC expertise and knowledge becomes removed from decision making processes • Investment can lose alignment with strategy
Financial Implications	<ul style="list-style-type: none"> • Annual cost to manage and administer – own financial accounts, likely payment of Trustees/Board members • The charitable incentives from this model, may not out way the additional costs • Sustainability of the Trust in the long term, should funding decisions change with changes politically • May not provide value for money without committed co-investment or funding • May be financially better suited to a delivery partner rather than funding administration
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • Time, cost and resource to stand up and set up • Will require constitution, board/trustees and staff to manage if no internal ORC resource is allocated • Will need dedicated resource to attract and confirm co-funding or co-investment arrangements • Will need to meet LGA requirements of a CCO or Trust including separate financial accounts and auditing, as well as branding, marketing etc

Council Meeting – 25 June 2025

frequency

Questions for Consideration...

1. How does this model align with our game plan? (that is what we want to achieve and the impact we want to have?)
2. Does this 'model in action' align with your definition of 'large-scale'?
3. If we use this model, how will we know if we're 'winning' or working towards achieving our impact/outcomes?
4. Is there anything missing from the identified strengths, opportunities, weaknesses and risks identified?
5. Are there any surprises in this or the financial and operational considerations we've outlined?
6. What is the level of cost required to get this model up and running effectively (low vs high)?
7. What is the level of effort required to get this model up and running effectively (low vs high)?
8. What the level of risk that this model presents and is this appropriate within the context of what we're trying to achieve?
9. Does the level of effort required (from us internally and from our providers/community/partners) warrant its further consideration (low vs high)?

frequency

Other 'sort of' Models

In our discussions, we found other models being implemented by Council's which didn't quite fit the parameters we were given. These included:

- Auckland Regional Council – relationship with the NZ Nature Fund
- Taranaki Regional Council – Wild for Taranaki
- Hawkes Bay Regional Council – An Incorporated Society and a Trust in place
- Kotahitanga mō te Taiao (KMTT) – alliance between TA's, iwi and NZ Nature Conservancy

What we struggled to find (but may still find)

- Partnership between Council's and an iwi entity where they co-invest and both have funds to distribute
- Partnership between Council's and a philanthropic entity where they both have funds to distribute
- A stand-alone Trust owned by a Council (or groups of Councils) who have a mandate and role to allocate funding – most Trust and CCO models are set up as delivery partners – such as Zealandia in Wellington. Hawkes Bay is a partial fit
- Where collaborative or co-funding investment is of 'large-scale' – e.g. some models see investment circa \$50K

frequency

Assessing each model
against a Risk, Value, Cost
and Effort Matrix



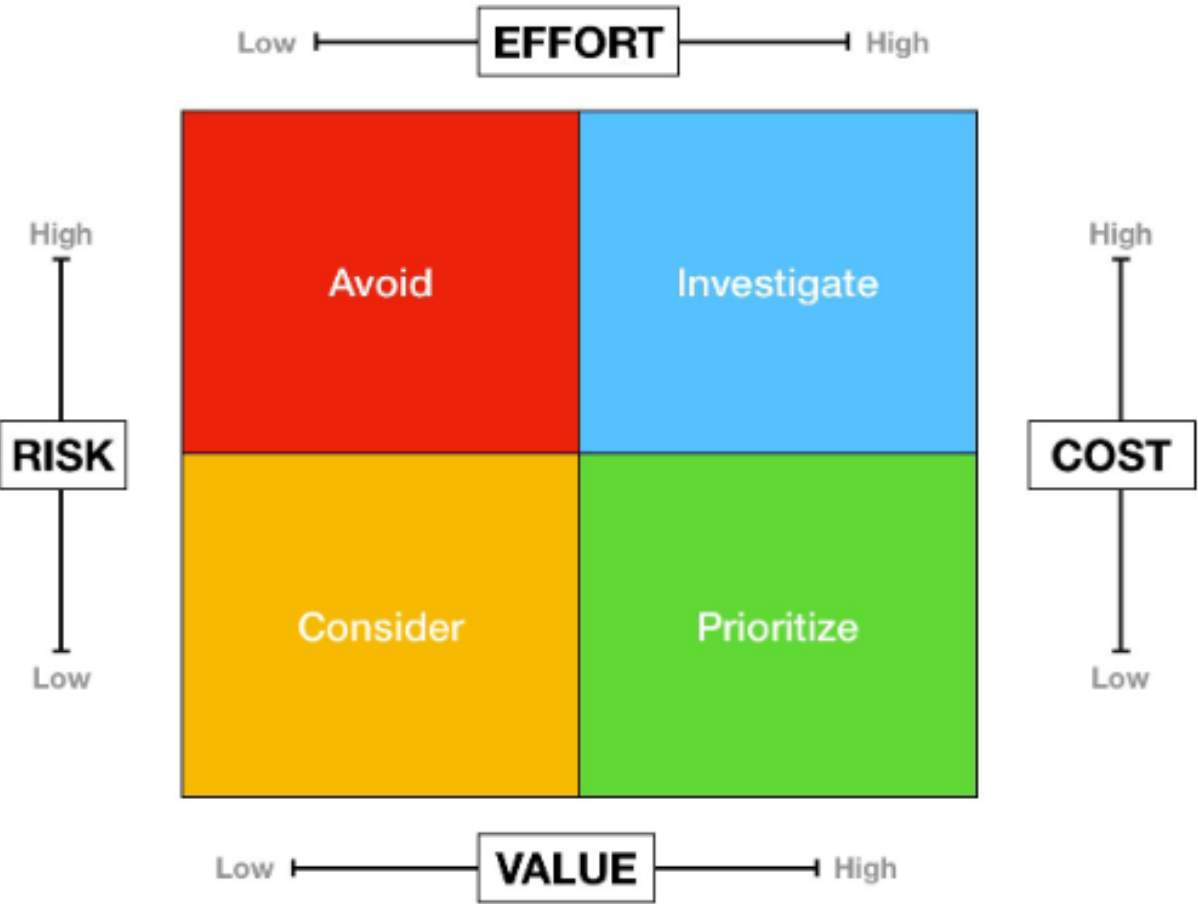
frequency

The RVCE Matrix

- Now that you have read the detail on each model and have considered the questions please use a Risk-Value-Cost-Effort Matrix to assess each model
- This matrix provides a framework to help prioritise decisions using a criteria (and definition of each criteria) in a structured and efficient way
- The final prioritisation is best determined as a group to discuss viewpoints and promote transparency
- The matrix will allow us to assess whether each model requires a low or high level of risk, value, cost and effort
- Each model must be clearly placed in a quadrant – not on a line

frequency

RVCE Matrix for Decision Making



frequency

Category Definitions

- **Risk** – the level of risk to Council by using this model, which may include relationship risk, loss of money, risk to achieving your intended goals and outcomes with the funding. It can also relate to the risk of overall effective delivery, and can extend to the risk that may extend into communities/catchments
- **Value** – this relates to the alignment to what you want the fund to achieve, the economic value the investment can bring, as well as value to communities and the environment
- **Cost** – this relates to both the investment to stand up and continue to operate and administer the model, as well as the ongoing cost implications – such as the level of investment you can make in initiatives, or how thin you spread the investment
- **Effort** – this is the level of effort required to make the model operational and functional in the long-term and should take into account quality and quantity of resources needed, management time, level of in-kind support needed internally and to the sector/partners/communities

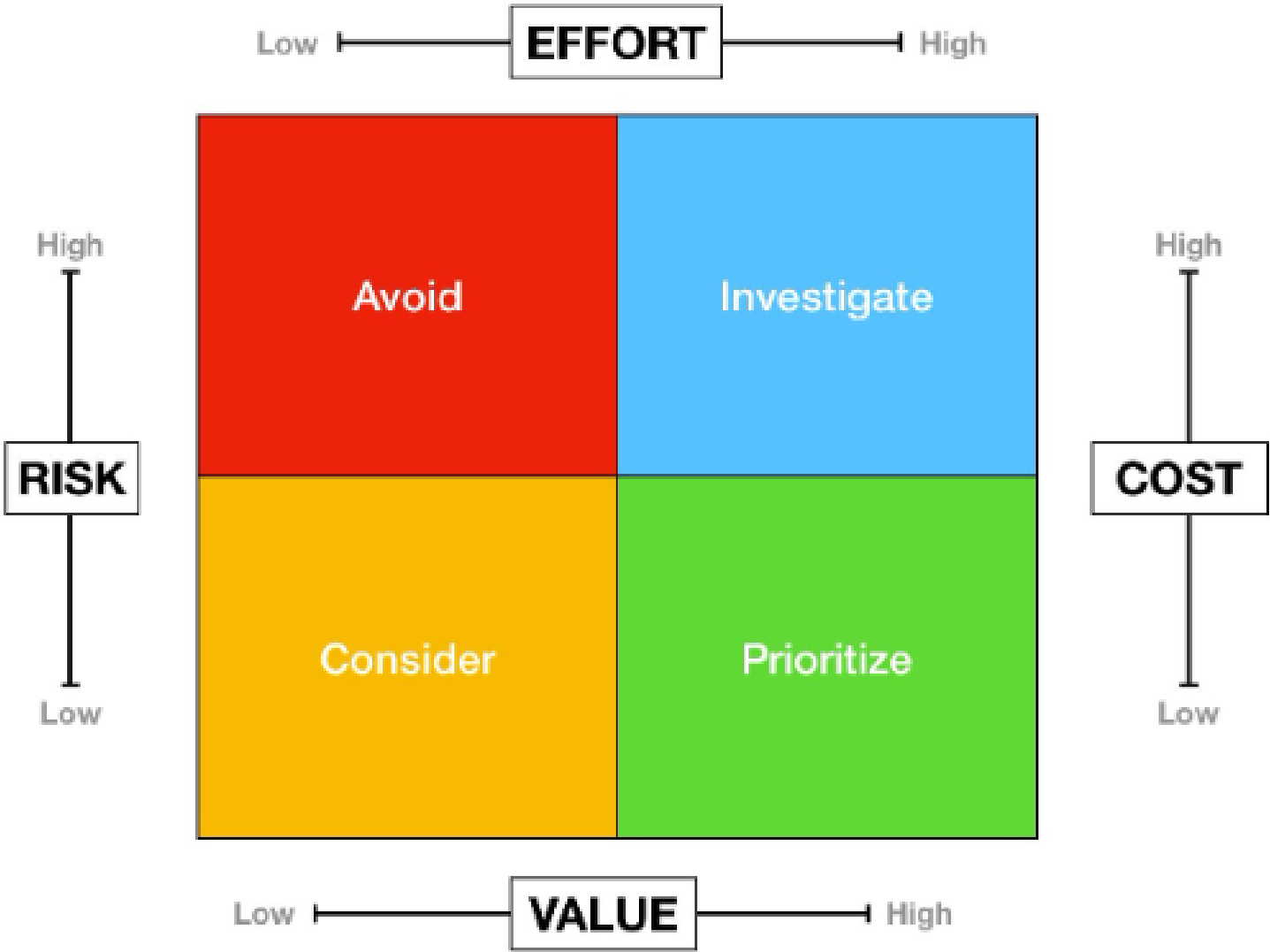
frequency

Quadrants Explained

- **Quad 1: Avoid** – these models should be avoided as they are assessed as high cost, high risk and low/lower value.
- **Quad 2: Considered** – these models could still be considered as opportunities as they require low effort, cost and risk to ORC. Their value may still be low or unknown.
- **Quad 3: Prioritised** – these models should be investigated further as we believe they create high value, and although require high effort, are low risk and cost effective
- **Quad 4: Investigated** – these models rank highly across all four assessment areas and they should be investigated further as the payback in time and effort put in may achieve substantial value

frequency

Plot each model on the matrix – make any notes for your reasons why



frequency

Thank you
We look forward to the discussion!



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Appendix 6: ORC Councillor Workshop 2 – Presentation



frequency

Council Workshop

Update on ORC Environmental Funding Project

18 February 2025

Council Meeting - 25 June 2025

frequency

Workshop Agenda

Time	Item	Discussion Lead
2.00pm – 2.05pm	Welcome and Workshop Opening	Co-Chairs
2.05pm – 2.15pm	Questions and Discussion on Research and Stakeholder feedback (contained in the pre-readings)	Emma Hodgkin
2.15pm – 2.45pm	Discussion and agreement on definition of ‘large-scale’	Emma Hodgkin & Marinah Rondel
2.45pm – 3.00pm	BREAK	
3.00pm – 4.45pm	Funding Model discussion, Q&A and assessment against RVAC Matrix	Emma Hodgkin & Marinah Rondel
4.50pm – 5.00pm	Confirmation of agreed models for further review and other agreed actions	Libby Caldwell
5.00pm	Closing	Co-Chairs

frequency

Intended Outcomes of the Council Workshop

By the end of the workshop, Councillors will:

- **Understand what evidence and best practice tells us** about how to invest to support and achieve environmental gain.
- Have a greater understanding of how this **fund and funding mechanism could impact** local TA's, community stakeholders and other funders.
- **Discuss a definition of 'large-scale'** and the high level criteria that will form this definition from the Otago context.
- **Discuss on the ideal long-term aspiration** of the Council for the future model of funding – determine the 'end game'.
- Understand the **implications and timing of the implementation** of the large-scale fund in relation to the ORC Biodiversity Strategy refresh.
- Be more **familiar with the range of funding mechanisms available**, their strengths and risks, the potential long term impacts and considerations, and insight into how the model is currently working in practice.
- Identify and **agree a short list of funding model options**, based on an assessment against risk, value, cost and effort, that require further investigation for the final report to be presented to Council in May 2025.

frequency

Previous Workshop Outcomes

What we heard from you last time:

- The scope of this project was to focus on the definition, and use of this new funding only (not all funding).
- A more precise definition was needed to define what “large-scale environmental funding” means from the ORC context.
- Many environmental areas are considered a priority for this funding, apart from Transport.
- Investment should be directed towards need, not necessarily allocated out across catchments evenly.
- Supporting salary costs with ORC funding was seen as important to continue.
- That ORCs investment into large-scale should be viewed as a ‘hand up’, and that co-funding arrangements would need to be in place to avoid long-term reliance on ORC funding.

frequency

Previous Workshop Outcomes

Councillors wanted to see further information and analysis on the following areas/topics:

- Research and evidence to inform a local definition of ‘large-scale environmental initiatives’.
- Evidence on the funding mechanisms most effective to contribute to outcomes (e.g. direct vs contestable funding).
- Evidence on the level of, or duration of funding needed to meet biodiversity or environmental outcomes.
- Details and analysis of the types of funding mechanisms available to Council to administer these funds in the short and long-term, with examples of the structures and learnings of other Council’s.
- Detail of the opportunities open to Council to grow investment through co-funding, CCO and Trust type mechanisms.

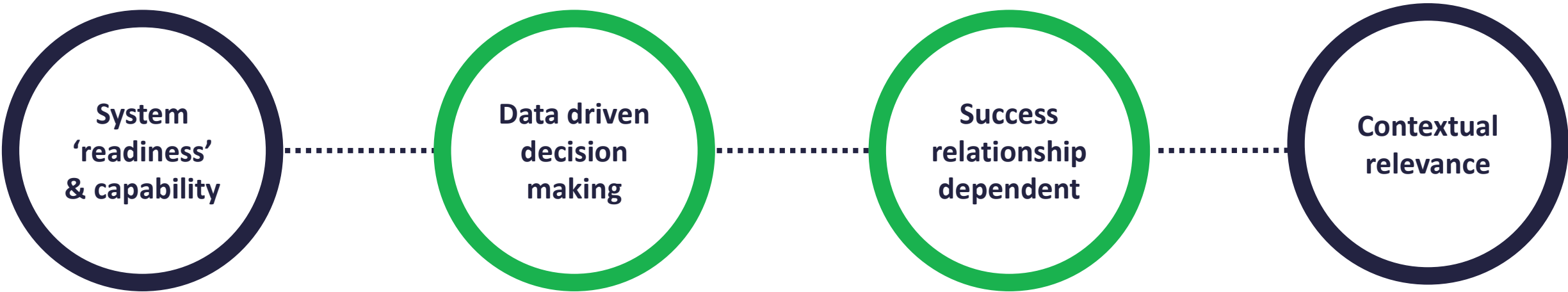
frequency

Understanding what the evidence and our stakeholders are telling us

A summary of the key themes from our review of
the research and stakeholder engagement to
date

frequency

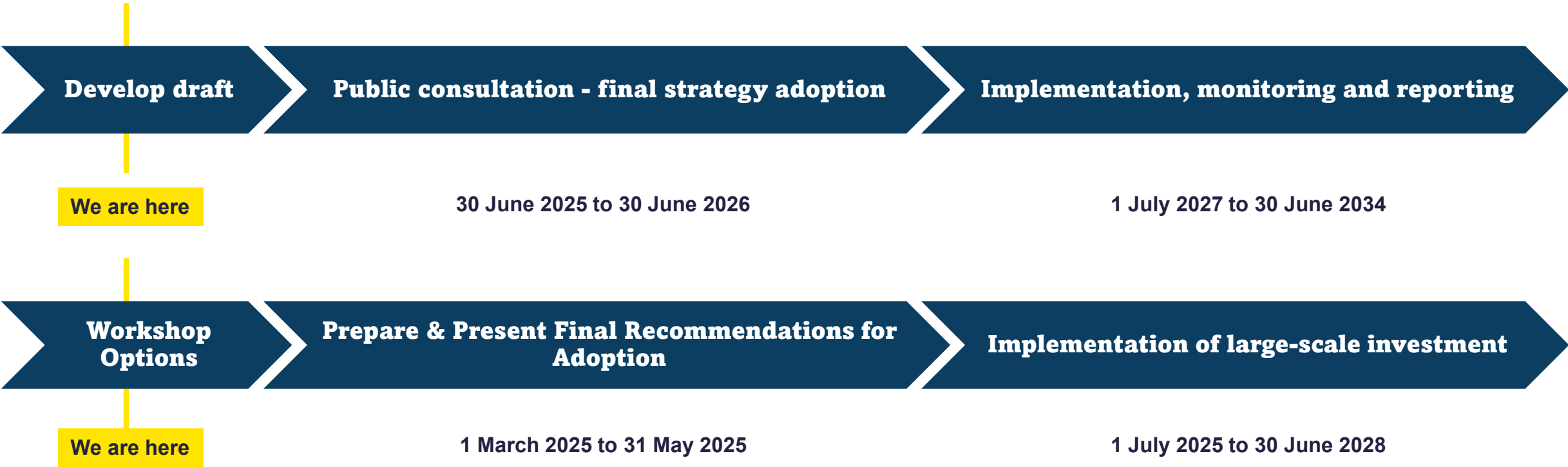
Key Themes



frequency

Alignment and Timing in relation to the ORC Biodiversity Strategy

- Intent of the Strategy is to align collective biodiversity outcomes for Otago with the ways we’re going to achieve them, in alignment with the NPSIB (2023)



frequency

Defining Large-Scale

Definitions from the evidence and proposed definition for ORC

frequency

So what is large-scale?



frequency

Our Proposed Approach

- A high-level definition is proposed (for governance purposes) with
- More detailed criteria explaining the application of the definition at a management/operational level
- The recommended criteria will be included in the final report

frequency

Activity 1

- Split into two groups
- Write down three things that you want the fund to achieve
- Present back your outcomes to the group



frequency

Activity 2

- Stay in your two groups
- On one piece of paper write your definition of large-scale
- On the other piece of paper, write your definition of landscape-scale
- Think about the funding cycles as part of this – i.e. is this \$2M p/a or \$6M over three years?
- Present back your definitions to the group



frequency

Definition of Large-Scale

frequency

Funding Model Discussion

Discussion of six possible options and agreement on preferred options for further investigation

frequency

Quick recap from the feedback and evidence

- Contestable funding mechanisms drive competition and are time and resource intensive
- Short term funding and focus on 'new' creates significant challenges to delivery and sustainability
- Balancing transparency and accountability with good environmental outcomes is difficult
- ORC and the sector need to be 'ready' for the model ORC wish to
- Leveraging additional investment is harder than it sounds
- The impact of investment is likely to be greater, where the model allows for continued ORC leadership and involvement
- Feedback tells us that the most effective models function a step removed from elected officials

frequency

Funding Models for Discussion

1.

Contestable Funding Model
(i.e. upscaling the ECO Fund)

2.

Direct Funding Model or
EOI

3.

Funding by Catchment or
Biodiversity priority/plans

4.

Administration of a Fund by
a third party
(i.e. an existing Trust or CCO)

5.

Collaborative, Co-funded
or Joint Venture model
(i.e. pooled funding or joint funding
with philanthropic entity or other
local authorities

6.

Establish stand alone Trust
or CCO entity to leverage
and administer funds

frequency

The RVCE Matrix

- Now that you have read the detail on each model and have considered the questions please use a Risk-Value-Cost-Effort Matrix to assess each model
- This matrix provides a framework to help prioritise decisions using a criteria (and definition of each criteria) in a structured and efficient way
- The final prioritisation is best determined as a group to discuss viewpoints and promote transparency
- The matrix will allow us to assess whether each model requires a low or high level of risk, value, cost and effort
- Each model must be clearly placed in a quadrant – not on a line

frequency

Category Definitions

- **Risk** – the level of risk to Council by using this model, which may include relationship risk, loss of money, risk to achieving your intended goals and outcomes with the funding. It can also relate to the risk of overall effective delivery, and can extend to the risk that may extend into communities/catchments
- **Value** – this relates to the alignment to what you want the fund to achieve, the economic value the investment can bring, as well as value to communities and the environment
- **Cost** – this relates to both the investment to stand up and continue to operate and administer the model, as well as the ongoing cost implications – such as the level of investment you can make in initiatives, or how thin you spread the investment
- **Effort** – this is the level of effort required to make the model operational and functional in the long-term and should take into account quality and quantity of resources needed, management time, level of in-kind support needed internally and to the sector/partners/communities

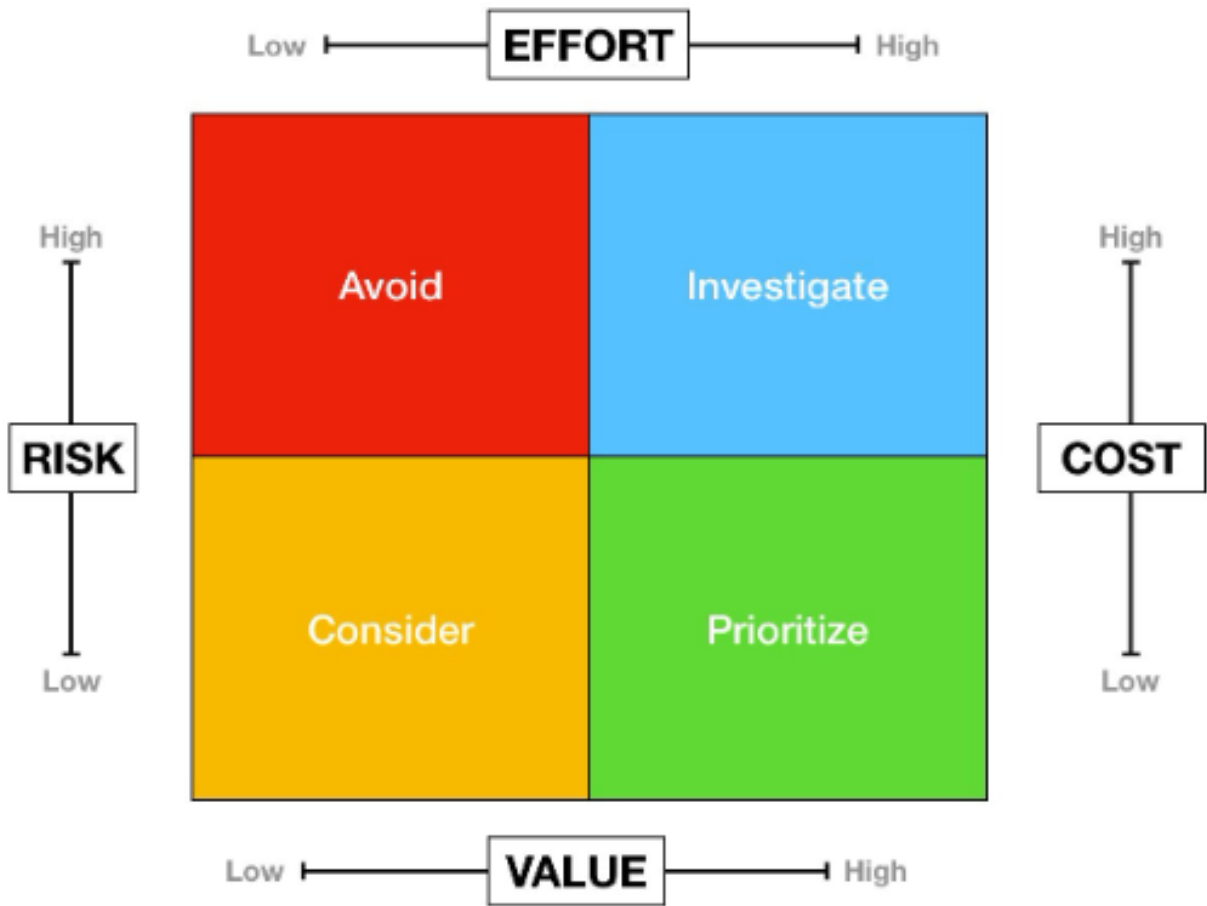
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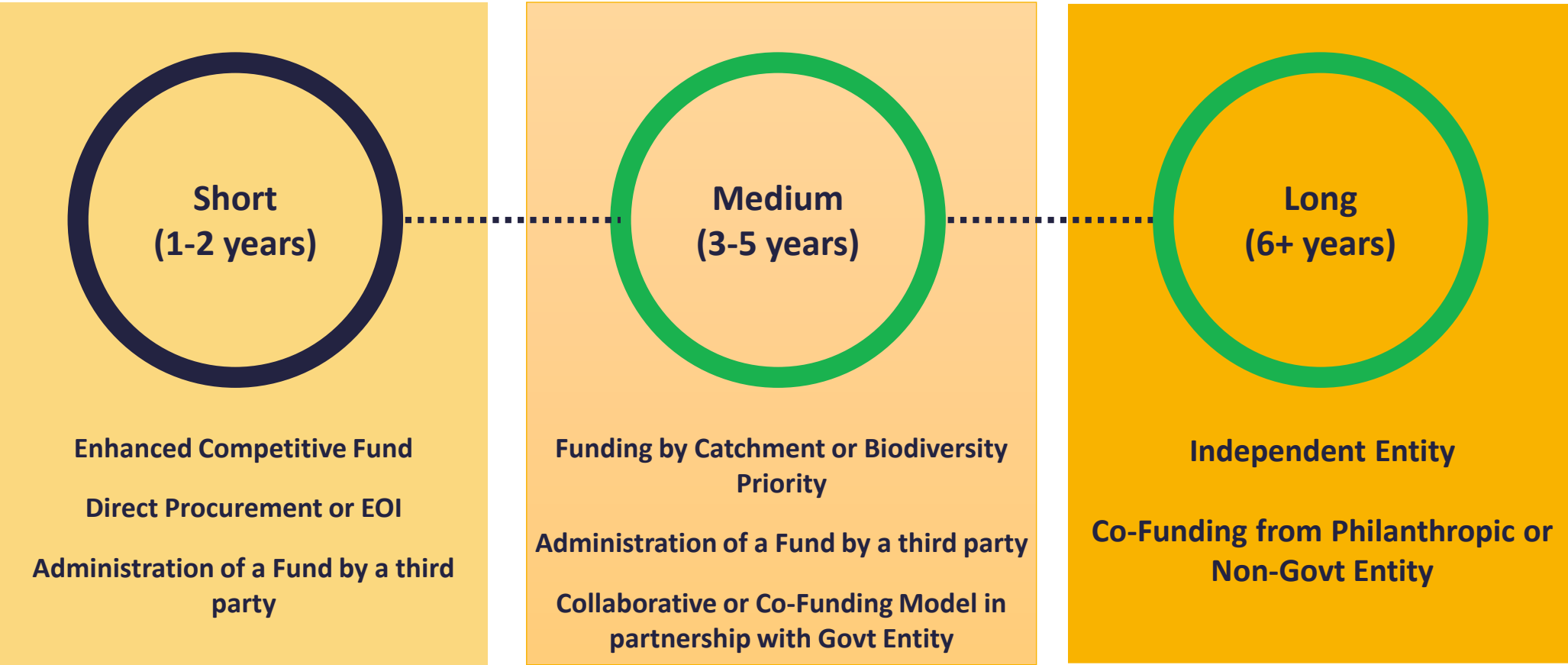
frequency

RVCE Matrix for Decision Making



frequency

Likely Timescale per Option



frequency

1.

Contestable Funding Model



How this could work/look in practice:

- New contestable fund
- Upscale existing ECO Fund
- All or only part of the new funding allocated to this

Strengths	<ul style="list-style-type: none"> • Can be administered internally as systems already in place • Implemented effectively in the short term • In the short term, can fill funding void created by JfN ending
Opportunities	<ul style="list-style-type: none"> • Examine and realign all fund types to ensure all 'needs' are met across available funding • Consistent investment can result in being able to determine return on investment
Weaknesses	<ul style="list-style-type: none"> • Doesn't necessarily ensure investment into the right place for the right project • Reduces ability for a collaborative approach between Council and communities • Internal capacity within current resourcing to effectively manage and administer • Limited opportunity for co-funding or relationship with other funders • Investment decisions made before Biodiversity Strategy completion
Risks	<ul style="list-style-type: none"> • Perpetuates the cycle of highly competitive funding • May discourage collaboration between providers • May inadvertently fuel the culture of funding 'new' projects rather than maintaining existing • Doesn't clearly foster or support long-term org. sustainability
Financial Implications	<ul style="list-style-type: none"> • Risk investing in the providers best placed, or with the resources to write the best funding applications • Investment may not be targeted to the highest priorities or the best environmental outcomes • Will need to decide number of rounds and length of investment (i.e. \$2M annually, or \$6M allocated for three years) • Contestable funds are expensive to administer • If this is a short-term measure, the length of investment needs to be long enough for benefit to the provider and community
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • Contestable funds are incredibly resource intensive to effectively manage and monitor • Timing of the fund to either align with, or different timing to the current ECO Fund processes • How evaluation or review of performance may be undertaken • Doesn't easily allow for opportunities for sector wide, or Council wide collaboration

Council Meeting – 25 June 2025

frequency

Discussion Notes

frequency

2.

Direct Funding Model
or EOI



How this could work/look in practice:

- Set and agree criteria against definition
- Provide support & engagement with interested providers/delivery partners
- Determine procurement timelines in partnership to ensure best outcomes for all parties

Strengths	<ul style="list-style-type: none"> • Can direct funding to high priority issues and ecosystems • Can determine suitable (or preclude) providers early due to the procurement process • Can be less resource and time intensive than a competitive process • Can allow for more provider collaboration during the process
Opportunities	<ul style="list-style-type: none"> • Can drive innovation and collaboration • Can enable opportunities for Council and providers to work together on long term sustainable funding options
Weaknesses	<ul style="list-style-type: none"> • Still requires significant capacity and capability internally during implementation • Can lose some transparency in the process if only certain providers approached
Risks	<ul style="list-style-type: none"> • May limit the pool of suitable providers if base assessment too heavily on past performance alone • Criteria may be too narrow and excludes some groups or communities unknowingly • Could damage relationship with existing providers or communities who feel excluded • Provider capability may be stronger in one catchment or geographical area, leading to the perception that only one part of ORC area is receiving funding
Financial Implications	<ul style="list-style-type: none"> • Risk investing in the providers best placed, or with the resources to write the best funding applications • This can be mitigated by a pre-procurement screening process, but this may result in investment into only one or two catchment areas • Investment may not be targeted to the highest priorities or the best environmental outcomes • Will need to decide number of rounds and length of investment (i.e. \$2M annually, or \$6M allocated for three years) • Contestable funds are expensive to administer (even if undertaken via direct procurement) • If this is a short-term measure, the length of investment needs to be long enough for benefit to the provider and community
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • While the procurement process may be less intensive, the ongoing management and monitoring of contracts/programmes is resource intensive • The SWOT of this model will be largely reliant on the procurement parameters and criteria put in place

Council Meeting – 25 June 2025

frequency

Discussion Notes

frequency

3.

Funding by catchment
or biodiversity
priority/plans



How this could work/look in practice:

- Set and agree criteria against definition
- Align the planning process and implementation plans to investment
- Determine order and timing of delivery and sustainability of funding investment

Strengths	<ul style="list-style-type: none"> Allows for systematic funding approach that is grounded in evidence and priority Pilot already completed and best practice approach evolving/developing
Opportunities	<ul style="list-style-type: none"> Allows for stronger alignment from strategy and data to implementation and action Develop closer on the ground relationships and collaborations with community groups to lead action More science in action initiatives May allow for greater partnership and collaboration between existing community groups/providers Can work with the willing – quick wins to be had
Weaknesses	<ul style="list-style-type: none"> Investment may not go to area of highest biodiversity need but driven by level of community engagement Likely to be only short-term investment as will dilute value and effectiveness as more plans are completed Capable providers may miss out on opportunities if community action and engagement doesn't follow Impact diluted over time as more Plans are completed Significant internal resource required to drive the process
Risks	<ul style="list-style-type: none"> May not be a suitable provider in the catchment area to hold and administer the funds on behalf of Council Community enthusiasm and engagement may wane over time Sustainability of the work post-investment if the group has no mandate or activity past the implementation of the CAP May struggle to leverage additional investment if a new group needs to be established (no history of delivery)
Financial Implications	<ul style="list-style-type: none"> Sustainability of the funding – probably can't fund all 10 catchments at once May need a lot of support to transition groups to deliver past the life of the funding (implementation plan may be very aspirational and/or inter-generational) Depending on who is funded, capability and capacity may be limited, or no formal entity to fund may exist Prioritisation and timing of the funding will need to take place, but this may not align with community readiness
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> The internal resource and capacity required will increase as more Plans are developed Additional resources will be needed to support Plan implementation in addition to Plan development Resources may become spread thin on the ground over time

Council Meeting - 25 June 2025

frequency

Discussion Notes

frequency

4.

Administration of a
Fund by a third party

Timescale
Short
(1-2 years)

Timescale
Medium
(3-5 years)

How this could work/look in practice:

- Contracting an existing Charitable Trust to manage and administer funds on behalf of council
- Contracting Port Otago to manage and administer funds on behalf of council (as ORC only existing CCO)
- Determine procurement criteria, application and accountability mechanisms directly with the third party
- ORC would need to pay an admin cost
- Role could be to administer and/or attract additional investment
- ORC staff would still need to support allocation process

Strengths	<ul style="list-style-type: none"> • Reduces internal administration and capacity for ORC staff • Keeps the fund at arm's length from Council and can be seen as a community fund rather than Council • Third party may be more cost effective compared to Council overhead costs
Opportunities	<ul style="list-style-type: none"> • Removes Council from direct funding decisions, allowing for greater opportunities to attract co-investment or philanthropic investment , and lever charitable entity benefits • Enhance relationship and collaboration with external providers • Allows for pooling for funds from multiple local authorities to achieve greater efficiency and impact of investment
Weaknesses	<ul style="list-style-type: none"> • Portion of the funds needed to cover admin of the Fund • Investment decisions are made by those removed from the day-to-day delivery on the ground • Currently unknown if there are any existing organisations with the capacity and capability to deliver this on behalf of ORC & not currently within PO core business or strategy • Still requires significant ORC management to ensure delivery against contract and KPIs • The ability to lever additional funds or investment will likely take significant time
Risks	<ul style="list-style-type: none"> • Transparency of use of rate-payer funds is potentially reduced • Entity is too far removed from day-to-day work, particularly if environmental funding is not their core business and investment moves further away from strategy • Reputational risk if contracted entity does not effectively deliver
Financial Implications	<ul style="list-style-type: none"> • Overall investment likely be diluted by circa 10% p/a to account for administration costs which may be able to be met by other internal ORC sources • Ability (and/or appetite) of a third-party to raise additional funds on behalf of Council may be limited • May not achieve value-for-money if the entity is not capable of delivering in the medium to long term
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • Will take time to get in place, especially if no willing party comes forward or existing relationship is established • No existing organisation may have regional mandate or reach that matches ORC boundaries • Significant level of internal capacity and capability required to ensure that fund is effectively being administered and ensure alignment is maintained with strategy • Effective investment decisions may be at risk if administering this fund is outside of their core business

Council Meeting - 25 June 2025

frequency

Discussion Notes

frequency

5.

Collaborative, Co-funded or Joint Venture model

Timescale
Short
(1-2 years)

Timescale
Medium
(3-5 years)

How this could work/look in practice:

- Pooled funding across local authorities to increase the overall value and ensure more collaborative investment
- Joint venture with philanthropic entity to allow greater, more efficient investment
- Will require a leader agency to oversee and administer
- Could be a scaled up over time from an MoU, Shared Service Agreement or long-term arrangement
- Relies on the desire to partner with Council

Strengths	<ul style="list-style-type: none"> • Can be built and eased into over time – from one partner to many, from pooling of funds to leverage additional funds and additional partners • Greater efficiency for providers in application process and potential streamlined accountability • Greater coordination of investment decisions • Can result in everyone ‘singing from the same song sheet’
Opportunities	<ul style="list-style-type: none"> • Potential to solidify a formal partnership with mana whenua and path to co-investment • Potential to solidify a path to formal partnership with a philanthropic entity and a path to co-investment • ORC to demonstrate true regional leadership with other local authorities and community
Weaknesses	<ul style="list-style-type: none"> • Challenge to align the environmental and investment priorities of co-funders with Council processes (or alignment across Council’s) • May require additional time and resource for ORC to act as a ‘host’ or ‘lead’ • Can mean that ORC is required to report to many ‘masters’ who may have differing expectations • Achieving alignment on funding priorities, across multiple mandated geographical boundaries can be difficult
Risks	<ul style="list-style-type: none"> • ORC value proposition will need to be strong to attract potential partners • The partnership and collaborations need to be already working in practice before becoming formalized – forced partnerships are rarely effective • Inequity in contribution can disrupt the partnership and balance of power
Financial Implications	<ul style="list-style-type: none"> • Level of investment others are able and willing to contribute • If funding available is to support collective action (such as Kotahitanga mō te Taiao) or if funding is available to support grant making/programme funding • Whether the administration costs outweigh the benefits by having a co-funding arrangement • The sustainability of the arrangement and investment (obtaining commitment past LTP cycles)
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • A long-term trusting partnership needs to be in place prior to collaborative investment coming • Timing for operational decisions may not align across entities (unless partnering with other local authorities) • Future proofing the arrangement if priorities change for the partner or co-funder • It may be difficult to find the right partner who matches priorities, aspirations and geographical reach • The internal capacity and capability required if ORC were to lead this (which logically they would)

Council Meeting – 25 June 2025

frequency

Discussion Notes

frequency

6.

Establish stand alone Trust
or CCO entity to administer
and leverage additional
funds



How this could work/look in practice:

- Suitable model to be determined and the ‘why’ clear
- Administratively heavily to set up and cost to administer
- May be able to leverage additional investment but likely take time
- ORC staff would need to retain involvement in decisions to ensure alignment with policy, strategy and evidence base

Strengths	<ul style="list-style-type: none"> • Can have a separate brand and identify from Council that is meaningful and engaging for communities and potential funders • Leverage charitable benefits and additional investment • Independent governance board
Opportunities	<ul style="list-style-type: none"> • Increase the overall pot of investment in environmental initiatives • Create innovative funding and partnership arrangements • Achieve regional spread and landscape scale environmental outcomes if scale of leveraged investment allows
Weaknesses	<ul style="list-style-type: none"> • Time and resource intensive to establish and administer • Requires separate governance, management and reporting structures which all need to be funded • Additional workload and expectations on existing Councillors and/or ORC to ensure effective representation • Investment prioritized directly to community over alignment with Council/Govt
Risks	<ul style="list-style-type: none"> • Until such time as additional investment is leveraged, the model can be seen as costly, with little direct benefit to rate payers • ORC expertise and knowledge becomes removed from decision making processes • Investment can lose alignment with strategy
Financial Implications	<ul style="list-style-type: none"> • Annual cost to manage and administer – own financial accounts, likely payment of Trustees/Board members • The charitable incentives from this model, may not out way the additional costs • Sustainability of the Trust in the long term, should funding decisions change with changes politically • May not provide value for money without committed co-investment or funding • May be financially better suited to a delivery partner rather than funding administration
Operational Implications <small>Creating a thriving Aotearoa for future generations</small>	<ul style="list-style-type: none"> • Time, cost and resource to stand up and set up • Will require constitution, board/trustees and staff to manage if no internal ORC resource is allocated • Will need dedicated resource to attract and confirm co-funding or co-investment arrangements • Will need to meet LGA requirements of a CCO or Trust including separate financial accounts and auditing, as well as branding, marketing etc

frequency

Discussion Notes

frequency

Other 'sort of' Models

In our discussions, we found other models being implemented by Council's which didn't quite fit the parameters we were given. These included:

- Auckland Regional Council – relationship with the NZ Nature Fund
- Taranaki Regional Council – separate Trust that Council supported the establishment of (not a CCO and no political representation) and provides funding for administration and delivery
- Hawkes Bay Regional Council – separate Trust and Incorporated Society
- Kotahitanga mō te Taiao (KMTT) – alliance between TA's, iwi and NZ Nature Conservancy

What we struggled to find (but may still find)

- Partnership between Council's and an iwi entity where they co-invest and both have funds to distribute
- Partnership between Council's and a philanthropic entity where they both have funds to distribute
- A stand-alone Trust owned by a Council (or groups of Councils) who have a mandate and role to allocate funding – most Trust and CCO models are set up as delivery partners – such as Zealandia in Wellington or Wild for Taranaki
- Where collaborative or co-funding investment is of 'large-scale' – e.g. most investments cira \$50-\$100K

frequency

Activity 3

- Split into two different groups
- Review each of the six models and discuss in your group
- Place each model on the RVCE matrix based on your group assessment
- Remember each model must be clearly placed in a quadrant – not on a line!
- Report back your placement and discuss the rationale for your choices



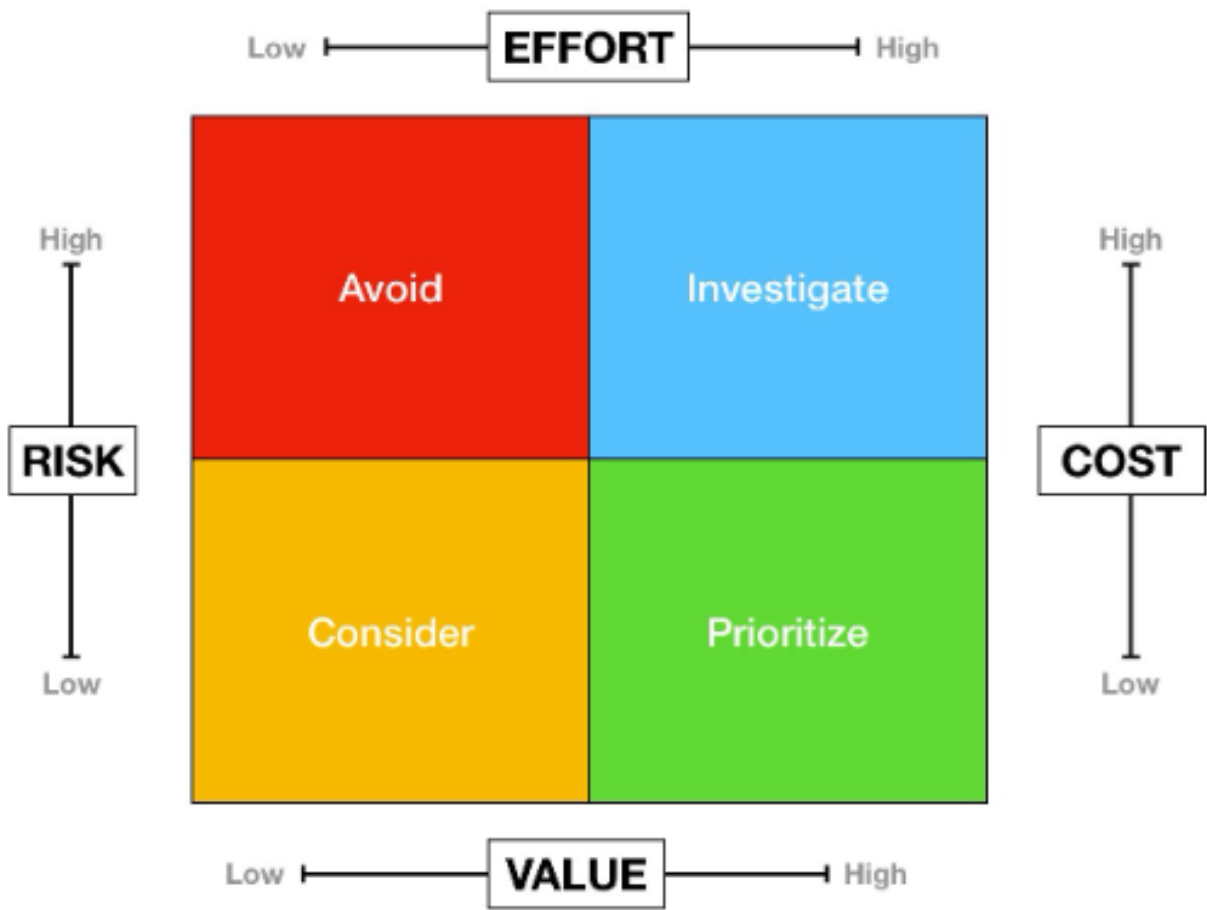
frequency

Questions for Consideration...

1. How does this model align with our game plan? (that is what we want to achieve and the impact we want to have?)
2. Does this 'model in action' align with your definition of 'large-scale'?
3. If we use this model, how will we know if we're 'winning' or working towards achieving our impact/outcomes?
4. Is there anything missing from the identified strengths, opportunities, weaknesses and risks identified?
5. Are there any surprises in this or the financial and operational considerations we've outlined?
6. What is the level of cost required to get this model up and running effectively (low vs high)?
7. What is the level of effort required to get this model up and running effectively (low vs high)?
8. What the level of risk that this model presents and is this appropriate within the context of what we're trying to achieve?
9. Does the level of effort required (from us internally and from our providers/community/partners) warrant its further consideration (low vs high)?

frequency

RVCE Matrix for Decision Making – Group Discussion and Feedback



frequency

Models in Order of Priority

frequency

Agreed Actions

- Confirmed definition is...
- Preferred funding models requiring further analysis are...
- Other agreed actions or data sought in the final report and/or final recommendations are...

frequency

Next Steps

- Continue stakeholder engagement – including individual rūnaka engagement
- Further investigation into the preferred funding models
- Development of a full draft report (due to ORC staff 31 March)
- Presentation of a final report and recommendations for Council approval (21 May)



frequency

Thank you
Nga mihi nui



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Appendix 7: Partner and Stakeholder Consultation Participants

Statutory Partners

- Aukaha
- Te Ao Marama*

Internal ORC Staff

- ORC Strategy team
- ORC Science team
- ORC Environmental Implementation team
- Biodiversity Strategy Working Group (via ORC Senior Advisor – Strategy)
- Edward Ellison (ECO Fund Panelist)

Local Authorities in Otago

- Dunedin City Council
- Waitaki District Council
- Central Otago District Council
- Queenstown Lakes District Council
- Clutha District Council

Other Regional and Local Authorities

- Auckland Council
- Waikato Regional Council
- Hawkes Bay Regional Council
- Taranaki Regional Council
- Environment Canterbury
- Invercargill City Council

Government Departments/ Crown Agencies

- Department of Conservation
- Sport New Zealand

Environmental Organisations / Community & Delivery Partners

- Kotahitanga mō te Taiao (KMTT)
- Biodiversity Hawkes Bay
- WAI Wānaka
- Southern Lakes Sanctuary Trust
- Predator Free Dunedin
- QEII National Trust
- Te Tapu o Tāne Ltd*
- Otago Catchment Communities Incorporated
- Whakatipu Wilding Conifer Trust
- Wild for Taranaki

Community Funders

- Wakatipu Community Foundation
- Otago Community Trust

* Organisation contacted but no formal meeting held

Appendix 8: Letter to Council Stakeholders

Briefing for Local Government on the Otago Regional Council's Environmental Funding Model Project

1.0 Background

The Otago Regional Council currently allocates just over \$2M per annum to support the delivery of 'environmental initiatives' around the region. This investment is a mix of contestable funding and funding that is directly allocated to providers for particular projects and initiatives. The contestable funding is allocated annually under the ECO General Fund, a large-scale biodiversity fund and a range of incentive funds that supports sustained rabbit management, native planting for water quality, native planting following pest plant control, and biodiversity enhancement on protected private land. These funds have been in place in one form or another since 2018 and fund a number of groups of landowners and not-for-profit organisations across wider Otago. The maximum allocation, length of investment and fund criteria differ for each type of fund, and you may be aware of many of the projects and past recipients in your community. For further background information, please visit [ECO Fund](#).

The direct funding allocated by the ORC supports a range of not-for-profit providers in the delivery of initiatives across the region, most of which is allocated annually and supports initiatives such as the QEII Partnership & Nga Whenua Partnership to support the protection of biodiversity, Predator Free Dunedin, Otago Catchment Communities and a range of Wilding Conifer groups.

Through the 2024/2034 LTP process, the ORC consulted on a proposed increase in environmental funding of \$500,000 per year from 2025/26, recognising that the current funding was significantly oversubscribed and that there was demand for further investment to support environmental and biodiversity outcomes in local communities. Following consultation, the ORC approved the allocation of an additional \$2 million per year to fund *'large scale environmental projects, funded by an Otago-wide rate'*. [long-term-plan-ltp-2024-34-decisions-following-feedback-table-240612.pdf](#)

2.0 Project Purpose & Scope

Following the Council decision, Frequency NZ Ltd has been contracted by the Environmental Implementation Team to support Council in determining the best model of allocating the new/additional funding that will become available annually from 1 July 2025.

An initial workshop with Councillors last month confirmed the following:

- This project will investigate the best use of funding for the additional \$2M per annum, with the existing funding streams remaining unchanged
- The ORC will work in partnership with mana whenua to ensure alignment with environmental priorities for investment
- Council wishes to invest in initiatives that can/will have a considerable environmental impact in the region
- Council seeks evidence of effective initiatives already in place across New Zealand and overseas that are achieving significant environmental impact, and to better understand the evidence around the effectiveness of 'large-scale' in terms of
 - Length of investment needed for impact
 - Level of investment needed for impact
 - The procurement/funding/contracting model implemented
 - How 'seed funding' type models of investment work best
 - Opportunities for partnership with other entities to further grow investment and return over time, including but not limited to, other Councils, other government agencies or the private and philanthropic sectors

Further information can be found by viewing the Council Workshop online at [Environmental Funding Workshop](#)

We have now entered a ‘discovery’ phase of this project, gathering information and data to support the development of some high-level feedback and options for Council to consider by end of February 2025, with the overall intended output of delivering a Final Report and Recommendations to the ORC in March/April 2025.

A key element of this phase is to meet with a range of stakeholders including Council partners within the ORC region, other government departments who have responsibility for environmental protection and enhancement, such as DOC, and a range of community stakeholders and providers across the region. These community stakeholders include some organisations already receiving funding from ORC or who have large strategies or future plans in place. These stakeholders have been identified by ORC and are being contacted directly. This is an open and collaborative process but resources for consultation are limited, and it is likely that not all community stakeholders you work with will be contacted. Will can share with you those stakeholders that will be or have been contacted in your local community.

Stakeholders will be contacted from end November, with the intention to hold online interviews during December 2024 and January 2025. Meetings are initially taking place with Councils and government agencies first to ensure that there is a clear understanding of what is being planned, delivered and funded across the region.

3.0 Timeline

The following high level, **indicative timeline** for the project and remaining phases is outlined below for your information.

Key Activities	October	November	December	January	February	March	April
Councillor Workshop							
Mana Whenua Consultation							
Desktop review and analysis of current, existing and legacy arrangements for funding distribution							
Council and Govt Department consultation to understand existing funding arrangements and initiatives plus future priorities							
Community stakeholder/NGO consultation							
'Other funder' consultation							
Second ORC Councillor Workshop							
Draft Report Preparation and Review							
Final Report to Council							

4.0 Key Questions for Discussion

We thank you for taking the time to meet with our team and discuss this project. We have a tentative question list that we will work through, which will hopefully provide you with further context to frame our discussion. This isn't an exhaustive list but a starting point to give you an idea of the type of information we are looking for. Your responses can remain confidential to the project team if you wish and will be anonymised unless required otherwise. Permission will be sought before any identifying information is given to ORC staff or Councillors.

The following questions will form our discussion (which we expect to take around 60-90 minutes)

Part A: Your own Council investment in environmental initiatives
<div>1. What are your Council priorities in this area and what are the main environmental issues in your communities/area?</div> <div>2. As a Council are you directly funding or investing in environmental initiatives, and are these delivered in-house or externally funded?</div> <div>3. What organisations are you currently funding and to what level?</div> <div>4. What initiatives are you funding and how are these funded (e.g. contestable process etc)?</div> <div>5. What is the application process for allocating funding?</div> <div>6. How do you distribute your funding—do you provide it as a lump sum or over multiple years?</div> <div>7. For funds distributed over multiple years, what is the typical timeframe, such as for a 3-year same sum distribution?</div>

<p>8. What criteria or process do you use to decide which groups to fund? For example, do you prioritize first-come applications or use specific evaluation criteria?</p> <p>9. Do you currently fund or support salary costs and/or admin costs?</p> <p>10. Can you describe the level of success or impact you have received from your investment? For example, have you undertaken any reviews or evaluations or impact assessments?</p> <p>11. Do you currently co-fund or jointly fund initiatives with other entities and/or do you think there are organizations locally who would be interested in partnering with the ORC to support increased investment in community driven environmental initiatives?</p>
<p>Part B: Your current relationship with ORC and link to investment in environmental initiatives</p>
<p>1. What is your relationship with ORC in relation to your own Council funding and/or the ECO Fund process?</p> <p>2. Are you aware of the initiatives and providers being funded in your community and to what level?</p> <p>3. Do you feel there is any duplication in what you are funding or ORC is funding?</p> <p>4. Do you feel there's any duplication in what you or ORC are funding with other govt departments such as MfE or DOC?</p> <p>5. Are there any gaps that exist between what is needed and what is currently funded? E.g. gaps left by ending of Jobs for Nature investment?</p>
<p>Part C: Future Investment Structure and Priorities</p>
<p>1. Do you have any concerns regarding the current ORC funding and mechanisms?</p> <p>2. Were you aware of the new funding approved by ORC in the LTP?</p> <p>3. What does 'large scale environmental funding' mean to your Council?</p> <p>4. What are the environmental priorities you think this funding should focus on?</p> <p>5. In your experience, do you feel there are any providers in your region with the capability and capacity to deliver a project of this nature and scale?</p> <p>6. If this funding is to provide seed funding only (which may include a portion of salary costs), do you believe this is something your Council would either contribute additional funds to or have other funders who could support it?</p> <p>7. What do you see as the greatest barriers or constraints to achieving environmental impact from project delivery/current funding?</p> <p>8. How would your Council like to be involved in the decision making and allocation of this funding in your community?</p> <p>9. Do you believe it should be Council's role (either Regional, City or District) to fund these types of initiatives and/or who should be funding/supporting them?</p>
<p>Part D: Other discussion points</p> <p>As needed</p>

Further information

Should you wish to discuss this project further directly with an ORC staff member, please contact Libby Caldwell, Manager Environmental Implementation in the first instance either via email libby.caldwell@orc.govt.nz or via phone on 021 175 0396.

Kā mihi,



Emma Hodgkin
Senior Associate,
Frequency NZ Ltd, Dunedin
emmah@frequency.nz
PH: 021 735 337

Appendix 9: Letter to Community Stakeholders



27 November 2024

Ōtepoti
8 Stafford Street
Dunedin
Otago 9016

National offices
Tauranga
Tāmaki Makaurau Auckland
Te Whanganui-a-Tara Wellington
Ōtautahi Christchurch

Otago Regional Council's Environmental Funding Model Project – Briefing for Community Stakeholders

Background

The Otago Regional Council currently allocates just over \$2M per annum to support the delivery of 'environmental initiatives' around the region. This investment is a mix of contestable funding and funding that is directly allocated to providers to support specific projects and initiatives. The contestable funding is allocated annually under the ECO General Fund, a large-scale biodiversity fund and a range of incentive funds that supports sustained rabbit management, native planting for water quality, native planting following pest plant control, and biodiversity enhancement on protected private land. These funds have been in place in one form or another since 2018 and fund groups of landowners and not-for-profit organisations across wider Otago. The maximum allocation, length of investment and fund criteria differ for each type of fund, and you may be a current or past recipient of these funds to deliver a project in your community. For further background information, please visit [ECO Fund](#).

The direct funding allocated by the ORC supports a range of not-for-profit providers across the region, most of which is allocated annually and supports initiatives such as the QEII Partnership & Nga Whenua Partnership to support the protection of biodiversity, Predator Free Dunedin, Otago Catchment Communities and a range of Wilding Conifer groups.

Through the 2024/2034 LTP process, the ORC consulted on a proposed increase in environmental funding of \$500,000 per year from 2025/26, recognising that the current funding was significantly oversubscribed and that there was demand for further investment to support environmental and biodiversity outcomes in local communities. Following consultation, the ORC approved the allocation of an additional \$2 million per annum to fund '*large scale environmental projects, funded by an Otago-wide rate*'. [long-term-plan-ltp-2024-34-decisions-following-feedback-table-240612.pdf](#)

Project Purpose & Scope

Following the Council decision, Frequency NZ Ltd has been contracted by the Environmental Implementation Team to support ORC in determining the best model of allocating the new/additional funding that will become available annually from 1 July 2025 (to be spent in the 2025/26 FY).

An initial workshop with Councillors in October confirmed the following:

- This project will investigate the best use of funding for the additional \$2M per annum, with the existing funding streams remaining unchanged (that is the ECO Fund and direct funding already in place)
- The ORC will work in partnership with mana whenua to ensure investment aligns with their environmental priorities and aspirations for investment
- Council wishes to invest in initiatives that can/will have a considerable environmental impact in the region
- Council seeks evidence of effective initiatives already in place across New Zealand and overseas that are achieving significant environmental impact, and to better understand the evidence around the effectiveness of 'large-scale' environmental initiatives in terms of
 - Length of investment needed for impact
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 - How 'seed funding' type models of investment work best

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- Opportunities for partnership with other entities to further grow investment and return over time, including but not limited to, other Councils, other government agencies or the private and philanthropic sectors

Further information can be found by viewing the Council Workshop online at [Environmental Funding Workshop](#)

We have now entered a 'discovery' phase of this project, gathering information and data to support the development of feedback and some high-level options for Council to consider by the end of February 2025, with the overall intended output of delivering a Final Report and Recommendations to the ORC in March/April.

A key element of this phase is to meet with a range of stakeholders including Council partners within the ORC region, other government departments who have responsibility for environmental protection and enhancement activities, such as DOC, and a range of community stakeholders and providers across the region.

Speaking with community stakeholders is an important part of the project, and ORC has requested that the project team speak with you as part of this project. The stakeholders we are approaching include a range of organisations, some may already receive funding or have done so in the past, they represent a range of community interests and issues, both geographically and environmentally, and may have significant large-scale initiatives already in place, or in the planning phases. It is not the intention to preclude anyone from being part of this process, this is an open and collaborative process, but the resources allocated by ORC for direct consultation are finite, and it is unlikely that we will be able to speak with everyone directly. While it is important to obtain the views and opinions of a wide range of stakeholders, the final decisions around the use, allocation and parameters of the fund, will be made by the Councillors, and will be considered in line with the strategic priorities of the Council, operational requirements and policies around the expenditure and use of rate-payer funds, evidence relating to best practice, research and evaluation as well as the views and feedback from other local Councils, government partners and community groups.

We have now begun to contact stakeholders that ORC has requested will be part of this process, with the intention to hold online interviews/discussions during December 2024 and January 2025. Meetings are initially taking place with Councils and government agencies to ensure that there is a clear understanding of what is being planned, delivered and funded across the region.

Timeline

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Key Questions for Discussion

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The following questions will form our discussion (which we expect to take around 60-90 minutes)

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Part A: The aspirations of your organisation, your services and operations
<ol style="list-style-type: none"> 1. What is the key role and purpose of your organisation and what services/projects do you currently deliver? 2. How are you funded and what level of reliance do you have on Council funding and/or other philanthropic grants? 3. Is there an aspiration for your organisation to become self-funded or self-sustaining, what would it take to achieve this and is that realistic/feasible? 4. Tell us a bit about the funding you receive – is it contestable funding, multi-year, does it fund salaries or wages, are you a legal entity or charity? 5. Do you partner with other organisations or community groups to either obtain funding or deliver projects (such as paying for grant admin support)? 6. What are the benefits and risks of the current funding models in place that support your project/s? 7. How do you currently measure the impact your projects are having on the environment? Are these measures something your organisation seeks to achieve or that is a requirement by your funders? 8. What goals do you have in place for the next 3, 5, 10 years? 9. What are some of the biggest challenges, opportunities, strengths and weaknesses you see going forward in the delivery of environmental initiatives in the region? 10. Do you know of other organisations delivering similar projects to you locally, nationally or internationally?
Part B: Your current relationship with ORC and your link to investment in environmental initiatives
<ol style="list-style-type: none"> 1. What is your relationship with ORC in relation to the funding your organisation receives and the projects you deliver? 2. Do you receive funding from other sources – either other Council's, philanthropic funds or other? 3. Of the funding you receive, what costs does this cover? E.g. project costs, salary costs, evaluation or research etc 4. Do you feel there is any duplication/overlap in what ORC and other Councils and/or govt depts are funding? 5. Are there any gaps that exist between what is needed and what is currently funded? (by ORC or other funders)? 6. What opportunities do you see to better coordinate and streamline funding? 7. What are the greatest risks or constraints in your current funding agreement?
Part C: Future Investment Structure and Priorities
<ol style="list-style-type: none"> 1. Do you have any concerns regarding the current ORC funding and mechanisms? 2. Were you aware of the new funding approved by ORC in the LTP? 3. What does 'large scale environmental funding' mean to your organisation? 4. What are the environmental priorities/domains you think this funding should focus on? 5. In your experience, do you feel that your organisation would have the capability and capacity to deliver a project of a 'large scale' nature? 6. If this funding was to provide seed funding only (which may include a portion of salary costs), do you believe this is something your organisation would be able to find additional funds or funders who could support it? 7. What do you see as the greatest barriers or constraints to achieving environmental impact from project delivery/current funding? 8. What do you see as the greatest barrier or challenge to your organisation becoming sustainable or self-sufficient without relying on ORC funding? 9. Do you believe your organisation and/or project is sustainable relying on a volunteer workforce or are paid staff required? 10. Do you believe it should be Council's role (either Regional, City or District) to fund these types of initiatives and/or who should be funding/supporting them? 11. Are there other successful initiatives and projects you're aware of that you think ORC should be looking at investing in, or organisations they should be looking to partner with?
Part D: Other discussion points As needed

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Further information

Should you wish to discuss this project further directly with an ORC staff member, please contact Libby Caldwell, Manager Environmental Implementation in the first instance either via email libby.caldwell@orc.govt.nz or via phone on 021 175 0396.

Yours sincerely,

Frequency NZ



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Appendix 10: Letter to Rūnaka Partners



31 January 2025

Ōtepoti
8 Stafford Street
Dunedin
Otago 9016

National offices
Tauranga
Tāmaki Makaurau Auckland
Te Whanganui-a-Tara Wellington
Ōtautahi Christchurch

Otago Regional Council's Environmental Funding Model Project – Briefing for Rūnaka

Tēnā Koe

Background

The Otago Regional Council currently allocates just over \$2M per annum to support the delivery of 'environmental initiatives' around the region. This investment is a mix of contestable funding and funding that is directly allocated to providers to support specific projects and initiatives. The contestable funding is allocated annually under the banner of the 'ECO Fund' and your rūnaka may be a current or past recipient of these funds to deliver a project in your community. The ORC also directly funds a range of not-for-profit providers across the region, most of which is allocated annually.

Through the 2024/2034 LTP process, the ORC consulted on a proposed increase in environmental funding of \$500,000 per year from 2025/26, recognising that the current funding was significantly oversubscribed, and the ending of Jobs for Nature funding would see funding reduced across the rohe. Following consultation, the ORC approved the allocation of an additional \$2 million per annum to fund *'large scale environmental projects, funded by an Otago-wide rate'*.

Project Purpose & Scope

Frequency Ltd has been asked by ORC to support them in determining the model and approach to best use these new funds, and one workshop was held with Councillors in late October, with a further discussion scheduled in February. Recent hui with the Mana-to-Mana group, and with Aukaha staff, felt that it was best to engage with rūnaka individually across the rohe to gain your views aspirations for the use of these funds, and how rūnaka may be involved in the future. Please be assured that contributing to these discussions will have no bearing on the ability for the rūnaka to access funding under current (such as the ECO Fund) or potential future funding opportunities that may come as a result of this work.

Council has asked that we engage widely across partners and stakeholders to valuable insights to support decision making. The final decisions around the use, allocation and parameters of the fund, will be made by the Councillors, and will be considered in line with the strategic priorities of the Council, as well as the feedback and input received.

The project team is available to meet with you to discuss this project and the aspirations and priorities for your rūnaka and this can be done in a number of ways, either collectively with multiple rūnaka, or as individual rūnaka, and/or with Aukaha input or support, online, via email or face-to-face. We would like to conclude these discussions by end-March and are currently meeting with other stakeholders during this time. It is likely that a final report and recommendations will be presented to Councillors in May.

Further information

Please let me or Kate Timms-Dean at Aukaha know how the rūnaka wishes to be involved and should you wish to discuss this project further directly with an ORC staff member, please contact Libby Caldwell, Manager Environmental Implementation via email libby.caldwell@orc.govt.nz or phone on 021 175 0396. We will provide further background information once we know how your rūnaka would like to be involved.

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Nāku noa, nā

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Creating a thriving Aotearoa
for future generations

Development and Implementation of ‘Large-Scale’ Environmental Funding

Summary Report

May 2025 | Frequency NZ Ltd



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Disclaimer

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The statements and opinions expressed herein have been made in good faith, and on the basis that all information relied upon is true and accurate in all material respects and not misleading by reason of omission or otherwise.

In addition, the following should be noted:

- We are not qualified investment advisors, financial analysts or accountants and therefore we have not considered detailed accounting or tax implications of the advice in our report.
- Our advice and recommendations are made at a conceptual level, accounting for applicable legislation, rules and regulations in relation to government contracting and procurement (that were accurate and relevant at the time of writing this report), as well as the feedback and learnings from partners and stakeholders.
- Should ORC wish to understand the detailed financial and tax implications of the funding models outlined in this report, they should seek the advice from those qualified to make such a detailed analysis or assessment.
- The observations and advice, as relevant, within this report are made within a historical context (experience and learnings from others that have already taken place). As events and circumstances frequently do not occur as expected, there will usually be differences between predicted and actual results, and those differences may be material. Accordingly, we express no opinion as to how closely the actual benefits and opportunities identified in each funding model will correspond to those predicted and we take no responsibility for the achievement of predicted results.
- This document references high level analysis to inform our findings and recommendations. By its very nature this analysis cannot be regarded as an exact science and the conclusions arrived at in most cases will of necessity be subjective and dependent on the exercise of individual judgement.

Any reference in this report to financial parameters and impacts has been completed to compare options; it does not constitute formal financial or investment advice and cannot be used or relied upon for this purpose.



Introduction

As part of its 2024–34 Long Term Plan (LTP), the Otago Regional Council (ORC) identified a significant funding gap for environmental initiatives, following the end of central government investment. In response, ORC proposed a new environmental fund to support large-scale projects, initially committing \$2 million annually from July 2025, funded via an Otago-wide rate.

This project involved extensive engagement with mana whenua, local authorities, community and environmental groups, and other funders, as well as a review of existing funding models. Councillors participated in workshops to define ‘large-scale’ and identify suitable funding model options, resulting in agreed principles and a prioritised shortlist of funding models for further investigation.

This report consolidates the research, engagement insights, and funding options aligned with government procurement rules. It offers recommendations for implementing the new fund and enhancing ORC’s overall approach to environmental investment, planning, monitoring, and evaluation.

Problem Statement and Project Scope

Public consultation during the LTP process, highlighted strong community support for this investment, with calls for clearer funding direction and broader inclusion of initiatives such as flood resilience, climate change, water and air quality, pest management, biosecurity, education, research, and community upskilling.

To support the establishment of this new fund, Frequency was engaged in September 2024 to investigate how ORC could strategically allocate and administer the funding. The project scope evolved from focusing on all environmental implementation investment, to focus solely on large-scale funding and was delivered in three key phases:

- **Phase 1 – Strategic Priorities:** Facilitated workshops with councillors and engagement with mana whenua to define the fund’s strategic outcomes and priorities.
- **Phase 2 – Analysis and Review:** Reviewed current ORC funding models, consulted with stakeholders, assessed national and international best practices, and evaluated future funding model options.
- **Phase 3 – Final Recommendations:** Insights from Phases 1 and 2 informed the development of final recommendations to guide fund implementation.

Strategic Context for Large-Scale Environmental Funding at ORC

The ORC is required to align its large-scale investment decisions with legislative and strategic frameworks, ensuring its funding initiatives contribute meaningfully to environmental outcomes.

Long-Term Plan (LTP)

Mandated under the Local Government Act (2002), the LTP sets ORC’s ten-year strategic direction, including investment priorities aligned with regional goals for environmental protection, enhancement, and sustainability. The goals of the ORC’s Strategic Directions 2024-24 serves as the current guiding document.

National Policy Requirements

ORC must give effect to national policy instruments under the Resource Management Act (1991) and Biosecurity Act (1993), including National Policy Statements (e.g., Freshwater, Indigenous Biodiversity, Urban Development) and national directions. These inform regional planning documents and investment strategies.

National Biodiversity Strategy

Te Mana o te Taiao (2020) and its Implementation Plan (2022) guide biodiversity restoration and protection nationally. ORC is a key regional delivery partner, and large-scale funding can contribute to achieving the strategy’s 2050 goals.

Regional Strategies and Plans

A suite of ORC and regional plans—including biodiversity, air quality, biosecurity, climate, and infrastructure strategies—inform funding priorities. The current review of the Biodiversity Strategy (due 2025) is a notable consideration for future investment decisions.

Catchment Management Approach

ORC’s Integrated Catchment Management (ICM) model focuses on community-led Catchment Action Plans (CAPs) to deliver long-term environmental outcomes. The Catlins pilot and Upper Lakes CAP are early examples, with more to follow. ICM is seen as a potential framework for allocating large-scale funding.

‘Large-Scale’ Definition and Criteria

The concept of ‘large-scale’ funding within the ORC context is both complex and deeply contextual. In developing an appropriate definition, the project team undertook an extensive review of literature and consulted stakeholders and partner organisations to understand the various interpretations of ‘large-scale’ and ‘landscape-scale.’

The literature suggests that while common features exist – such as spatial, temporal, biological, and financial dimensions – there is no single, universally accepted definition. Definitions vary widely depending on ecosystem size, biodiversity complexity, timeframes, collaboration levels, investment size, and the degree of community involvement. The term ‘landscape-scale’ also emerged as a well-established, albeit broad, concept in environmental literature, focused on interconnected ecosystems over wide areas that deliver both environmental and socio-economic benefits.

Stakeholder engagement reinforced that ‘large-scale’ is perceived differently depending on local context, governance structures, and community experience.

Council was heavily involved in the definition process, and following two Councillor Workshops, ORC chose to adopt a principle – and outcome-based approach, agreeing that the ORC’s approach to large-scale would be guided by the following:

Our investment will have contributed to creating intergenerational impact – that is making investment decisions to support initiatives and projects that are focused on enhancing biodiversity and environmental outcomes for the benefit of future generations. These will either be mana whenua led or supported and will be undertaken in partnership with mana whenua and communities.

We will have strengthened and enabled collaboration across the system by providing clear leadership – this recognises that while the ORC has a statutory and regulatory role in environmental stewardship, they also play a key role in leading the wider environmental system (in partnership with key government agencies and local authorities). Through this funding, ORC will work to lead and enable collaboration on the ground that will enhance community leadership and action.

We will have made investment decisions that align with our strategic priorities, in partnership with our communities – this recognises the importance of connecting our organisational and strategic priorities to implementation priorities, and then ensuring our investment contributes towards these. It is ensuring we use our scarce resources effectively to have a positive environmental impact while also delivering value for money to our ratepayers.

It was also agreed that the principles would be supported by an eligibility criterion to ensure investment decisions reflect ecological significance, community leadership, partnership with mana whenua, scalability of existing initiatives, and organisational capability. Ultimately, this approach seeks to balance ambition with practical flexibility, enabling ORC to fund initiatives that drive meaningful, enduring change across landscapes and generations. This approach also recognises the role of ORC as a ‘seed funder’ to support organisations and projects as they build to become self-sustaining.

Literature Review

Phase Two of the project undertook a comprehensive review of New Zealand Aotearoa and international literature to explore trends, challenges, and best practices in environmental and community funding. The focus was to identify effective grant-making models, delivery mechanisms, and long-term funding strategies relevant to ORC.

Key themes that were identified include:

- **Fragmented and Unsustainable Sector**
The community sector plays a significant economic and social role, yet it is fragmented, with many overlapping organisations and duplicated efforts. Funding has become constrained, with philanthropic contributions stagnating and reliance on short-term government contracts increasing.
- **Capacity and Capability Gaps**
Many community-led environmental groups lack the administrative, technical, and strategic capacity to manage large-scale projects and funding effectively, particularly where volunteers form the backbone of delivery.
- **Limitations of Contestable Funding**
Competitive, short-term grants often create instability, limit strategic planning, and disadvantage long-term outcomes. These models can drive inefficiencies, undermine staff retention, and lead to mission drift.
- **Need for Flexible, Multi-Year Models**
Evidence supports the use of longer-term, lower-competition, high-trust funding that supports operational support and encourages collaboration. Such models improve impact but require careful governance and accountability to mitigate risks.
- **Council’s Role Beyond Funding**
Councils can shift from funders to strategic enablers—supporting system-wide collaboration, fostering innovation, and aligning efforts across agencies. ORC has an opportunity to provide leadership by coordinating investment, strengthening delivery partners, and embedding strategic funding models.

The review highlighted a clear case for ORC to reconsider traditional funding approaches in favour of long-term, capability-focused, and collaborative models that align with sustainable environmental outcomes. These models demand robust governance but offer greater impact and resilience across the community sector.



Partner and Stakeholder Consultation

As part of the project, a comprehensive consultation process was undertaken with a wide range of partners and stakeholders to gather insights on current and future models for environmental funding in the Otago region. This engagement aimed to help shape the development of inputs needed for an effective ‘large-scale’ fund.

Consultation included mana whenua, territorial authorities, environmental groups, community and philanthropic funders, government agencies, other local authorities across Aotearoa, and ORC Councillors. The process prioritised open, honest feedback while maintaining confidentiality where necessary due to the sensitivities of some of the discussions.

Key findings include:

- **Mana whenua** highlighted water quality and access to mahinga kai as critical intergenerational priorities. While no formal hui with rūnaka occurred, Aukaha facilitated engagement, and it is recommended that further direct consultation be conducted before confirming the fund’s parameters.
- **Territorial authorities** identified challenges such as unclear definitions of ‘large-scale,’ administrative burdens of contestable funding, and concerns about duplication and sustainability of community-led initiatives. A strong preference emerged for a more strategic, region-wide approach to funding with emphasis on intergenerational and ecosystem-level outcomes.
- **Environmental groups and delivery partners** are diverse in scale and scope and often rely on multiple funding sources, including ORC, philanthropic grants, and other government support. These groups noted the growing importance of coordination via umbrella organisations to deliver landscape-scale impact and improve operational efficiency.
- The consultation confirmed widespread support for strategic alignment, long-term investment approaches, and stronger regional collaboration to achieve meaningful environmental outcomes. The insights and recommendations from these engagements will inform the future structure and focus of ORC’s proposed ‘large-scale’ environmental fund.

Community and Government Funders

Consultation with a small number of community funders and government departments revealed that while many entities contribute to environmental initiatives, their funding is often constrained by strategic mandates, constitutions, or donor intent. These constraints can limit flexibility for co-investment with government entities unless deliberate changes are made. Nonetheless, there is growing interest in longer-term, systems-level investments rather than one-off or annualised grants. Broader engagement is recommended to explore collaborative funding opportunities for future large-scale environmental projects.

Other Local Authorities

Discussions with a range of councils across Aotearoa revealed a shared shift away from short-term, project-based funding toward more strategic and collaborative models. Councils are exploring or implementing longer-term funding arrangements, supporting umbrella groups, and evolving their models to address internal resourcing challenges, align with desired outcomes, and to meet community expectations.

While no single model fits all, councils emphasised the importance of partnership strength, internal risk appetite, and the capacity and capability of community organisations. The findings underscore the need for ORC to develop a tailored funding approach that reflects regional context and invests in building collaboration and capability over time.



Funding Model Analysis and Discussion

This project undertook a thorough and methodical analysis of potential funding models for delivering 'large-scale' environmental investment, exploring six different options ranging from scaling existing grants to devolving funds to third parties. The assessment used a consistent approach for each model to determine its suitability for use within the 'large-scale' environmental funding context. This approach consisted of a review of the model against the following:

- Permitted activities under the Local Government Act (LGA) 2002.
- Permitted for use or application under the New Zealand Government Procurement Rules (4th ed.)¹ and
- Alignment with the Office of the Auditor General Government Procurement Guides.
- Existing evidence, literature or evaluation on the effectiveness of the model.
- Experiences and lessons learned from entities who already have this model in place within their organisation (or who have used the model previously).
- The likelihood of the model contributing towards the achievement of the three key principles agreed by council that constitute 'large-scale' in the ORC context.

Given ORC's responsibility to spend ratepayer funds wisely, transparency, value for money, and strategic alignment were central to the evaluation. Procurement best practices emphasised independent decision-making, accountability, and avoiding conflicts of interest—particularly excluding elected officials and closely involved staff from the funding review process.

The Council applied tools like the RVCE Matrix (Risk, Value, Cost, Effort) and quadrant analyses to prioritise models based on cost-effectiveness and risk. This structured approach allowed for objective comparison and helped eliminate less viable options early. Ultimately, the models that advanced for further consideration demonstrated a strong capacity to deliver ecological impact, financial prudence, and community collaboration—all in line with the Council's vision for transformative, long-term environmental change.

The six models that were initially considered were:

- Large-scale contestable funding or grant making activities (an expansion of the existing ECO Fund).
- A structured procurement approach – such as an ROI, RFP or direct engagement as a relational purchase.
- Funding 'large-scale' initiatives via the Integrated Catchment Management (ICM) Programme or by Catchment Action Plans (CAP).
- Devolving 'large-scale' funding to a third-party entity (such as a charitable entity or council-controlled organisation [CCO]) to administer on behalf of ORC. This could include the requirement to also grow the value of the investment available.
- Entering into a joint venture (such as a collaborative funding arrangement or co-funding arrangement) with entities which could include neighbouring local authorities, philanthropic funders or a mana whenua partner.
- Establishing a new council-controlled organisation as a non-profit making entity (such as a Trust) to administer the funding on behalf of ORC. This could also include the requirement to leverage additional bequests, donations and investment to grow the overall value of funding available to invest in large-scale initiatives.

¹ Our assessment of suitability has been made against the current Rules (4th edition) and not against the draft Rules outlined in the 5th edition. The future suitability of these models should be revalidated if substantial changes to the Rules are made prior to ORC implementing a 'large-scale' funding model or procurement approach.

A summary of the analysis undertaken of each model is outlined below:

Large-Scale Contestable/Grant Making Fund

Introduction to the Model and Procurement Approach

The proposed large-scale contestable funding model draws on ORC's existing ECO Fund processes, offering a substantial increase in funding to support biodiversity and environmental initiatives. The additional funding would either be integrated into the current ECO Fund or allocated as a separate 'large-scale' category. This model offers a potential fast implementation, aligning with the existing fund's framework. However, careful planning would be needed to determine whether the new fund operates within the existing cycle or as an independent funding round, and to determine how overlapping structures would be effectively managed. A key consideration would be to clearly communicate the differences between the two funding streams to avoid confusion and misapplication.

Governance of the Model

Governance would follow similar procedures to those under the current ECO Fund, with final decisions being endorsed by the Council, ensuring adherence to best practices in grant-making. The Council would receive regular updates on the fund's performance, but the responsibility for the detailed allocation decisions would remain operational, ensuring appropriate management oversight.

Fund Allocation Process

A new, tailored set of criteria would be required to reflect the unique nature of the large-scale funding, potentially complicating the current process. If integrated into the existing grant cycles, the fund could be offered annually, adding significant operational burden.

A dedicated independent panel would be needed to evaluate the applications, with successful projects being funded until the available budget is exhausted. However, managing both the ECO Fund and the large-scale contestable fund would demand additional internal capacity, particularly in application review and ongoing project monitoring.

Ongoing Management of the Model

The day-to-day management could be handled by the Environmental Delivery Team, in line with current practices. However, the larger scale of funding would likely require additional resources for administration, monitoring, and managing contracts, given the complexities involved in handling high-value grants. The existing team may need further support to effectively manage this expanded responsibility.

Likely Timescale to Full Implementation

The implementation could proceed quickly due to the existing structures in place. However, comprehensive communication and marketing strategies would be required to clarify the differences between this new funding model and the existing ECO Fund, potentially delaying the fund's launch but ultimately reducing confusion and inefficiencies.



Suitability of the Model Against ‘Large-Scale’ Funding Outcomes and Principles

While this model supports short-term investments with a focus on specific projects, it does not necessarily foster a collaborative, system-level approach to investment. The rigid nature of the contestable fund limits innovation and may restrict alignment with long-term strategic goals, although it could be adapted to better address the desired outcomes if necessary.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

This model offers several advantages, such as leveraging existing administrative structures, facilitating quick implementation, and addressing gaps left by previous funding sources. However, it also presents significant challenges. The competitive nature of the funding process could limit collaboration, and the existing capacity for managing such a large-scale fund is likely insufficient. The model may inadvertently prioritise projects based on the quality of applications rather than environmental impact, and it risks creating duplication or missed opportunities for co-funding with other partners. Additionally, the potential for short-term investments to undermine long-term sustainability could limit the overall effectiveness of the fund.

Financial & Operational Implications

The model's reliance on competitive processes and short-term funding could lead to inefficiencies. The resource-intensive nature of administering contestable funds also presents a financial challenge, as significant investment is required to manage the process and ensure that funds are used appropriately. Short-term investments may struggle to demonstrate value for money or deliver lasting environmental impact.

A clear strategy would be needed to avoid confusion between the ECO Fund and the large-scale fund. Additionally, increasing the number of funding rounds and applicants would strain both internal capacity and the workload of community organisations. The current reporting and monitoring systems may not be equipped to handle the scale of larger investments, requiring the development of new criteria and processes to ensure effective oversight. Moreover, the competitive nature of the fund limits collaboration across sectors and with other councils, hindering broader systemic engagement and reducing potential for more holistic, long-term partnerships.

Structured Purchasing Approach – Registration of Interest (ROI) and Request for Proposal (RFP)
Introduction to the Model and Procurement Approach

This model involves the allocation of large-scale funding through a structured procurement process, which can either be a minor or major relational purchase, depending on the value and complexity of the purchase. Unlike conditional grants, the process is more detailed, requiring Council to actively define its purchasing needs and the criteria for assessment. The procurement could occur in two stages: first, a Registration of Interest (ROI) to assess the eligibility of organisations, followed by a Request for Proposal (RFP) to gather detailed plans from those who qualify. A direct sourcing approach may be considered if no suitable organisations are identified, but this would require clear justification. The process encourages more open collaboration and open communication between the Council and potential providers, ensuring that large-scale funding aligns with strategic outcomes.

Governance of the Model

The governance of this procurement process will align with Council's existing policies, where Council oversees the adherence to procurement best practices and ensure value for money. Councillors would not directly review funding applications or make funding decisions but would approve procurement recommendations. Regular updates on project implementation and performance will be provided.

Fund Allocation Process

The two-stage process begins with the ROI, where organisations assess their eligibility to submit a full proposal. Successful organisations then submit detailed proposals through the RFP stage. This allows for a clear understanding of the funding requirements and the expectations for the outcomes. Once proposals are submitted, they are assessed by an independent evaluation panel, with recommendations sent to Council for approval. Successful organisations sign detailed contracts outlining key deliverables and monitoring processes. This process is managed through a formal and approved procurement management system such as GETs.

Ongoing Management of the Model

The Environmental Delivery Team within ORC could manage the process, from procurement to contract delivery and monitoring. Although this model is resource-intensive in terms of initial procurement, it allows for administrative efficiencies in the long term. A single funding round over two years is recommended, with mechanisms to renew funding for high performing organisations. Ongoing contract monitoring will ensure that the funded initiatives meet the expected outcomes.

Likely Timescale to Full Implementation

Implementation could occur in the short term, with funds allocated by the end of this calendar year. Effective communication and support will be essential to ensure the successful execution of the procurement process. Once allocated, contracts would remain in place for a minimum of two years.

This model supports long-term impact by focusing on building relationships and partnerships rather than funding individual projects. It encourages collaboration and innovation through the procurement process, allowing providers to propose how they will meet Council's priorities. Additionally, it aligns with ORC's strategic direction by facilitating a collaborative and more flexible approach to funding allocation than grant making alone can achieve.

Suitability of the Model Against 'Large-Scale' Funding Outcomes and Principles

Analysis of the Model's Strengths, Opportunities, Weaknesses, and Risks

The model offers clear procurement processes with defined outcomes and criteria, making it easier to identify suitable providers early on and saving time and resources. It promotes innovation and collaboration, particularly with opportunities for market briefings and multi-stage processes. Furthermore, it supports long-term funding arrangements and more robust contracting than traditional grant-making processes. However, the model also faces challenges, including the significant internal resources required for its initial setup, potentially risks enforcing an eligibility criterion that is too narrow, and the risk that only a small pool of providers may have the necessary capacity, especially in certain geographic areas. Additionally, there may be a negative impact on relationships with existing providers who feel excluded or overlooked, or if the distribution of funding may appear unequal across regions.

Financial and Operational Implications

The cost of administering the model in the short term may be higher, as the procurement process itself is likely more complex than approaches traditionally undertaken by ORC. Operationally, while fewer applications may reduce the initial administrative burden, ongoing contract management and monitoring will demand specialised skills and significant resources. Effective implementation relies on carefully timed procurement parameters, ensuring both adequate preparation time for respondents and sufficient internal capacity to manage the process and monitor progress.

Funding via the Integrated Catchment Management Programme or by Catchment Action Plan

Introduction to the Model and Procurement Approach

The Integrated Catchment Management (ICM) approach is designed to address environmental issues at a landscape scale by integrating social, economic, and environmental factors. By focusing on catchments rather than individual environmental issues, the ICM approach aims to bring about holistic, sustainable environmental change. ORC's commitment to this model was formalised through its 2021-31 Long-Term Plan (LTP), which allocated resources for developing and implementing Integrated Catchment Action Plans (CAPs). As part of this initiative, ORC is collaborating with iwi, communities, and stakeholders to develop CAPs, each tailored to a specific catchment area.

Despite the current limitations of funding for CAPs, ORC has recognised the need for a more robust funding mechanism to support the implementation of these plans as they are finalised. The challenge lies in ensuring that future funding is both sustainable and adequate to deliver the intended outcomes.

Governance of the Model

The ICM programme is governed at multiple levels, with overall oversight resting with the ORC Council, which is responsible for approving plans and funding. At an operational level, the ICM Working Group, which includes representatives from ORC, mana whenua, and community organisations, oversees the programme's development and execution. Community governance is managed by Integrated Catchment Groups (ICGs), who are responsible for developing the CAPs and presenting them for Council endorsement. Once approved, implementation is overseen by local governance groups, supported by the ICM team.

The governance structure for funding decisions, however, will be distinct from the broader ICM governance. ORC proposes to use existing procurement frameworks to guide funding allocations for CAP implementation, ensuring that all decisions adhere to procurement best practices and align with Council policies.

Fund Allocation Process

At present, no standardised process exists for allocating funds to support CAP implementation. While a direct funding mechanism has been initiated for the Catlins CAP, a more structured approach is necessary for larger-scale funding as more CAPs are developed. Under the proposed model, funds would be allocated based on detailed implementation plans, with annual budgets prioritising activities for each catchment area. However, a major challenge is the long-term funding commitment required, as these plans are expected to span a decade.

As the number of CAPs increases, a prioritisation process would be necessary to ensure that the most urgent and critical areas receive funding. This could involve comparing the relative importance of each CAP, which would require clear criteria for assessing need and impact. Additionally, as many CAP governance groups may lack the legal status or capacity to manage large-scale funding, it may be more efficient for ORC to directly manage the allocation of funds, rather than creating multiple decentralised procurement structures.

Ongoing Management of the Model

The management of the ICM programme and the allocation of funding will require ongoing collaboration between ORC staff and CAP governance groups. The ICM team will need to continue supporting catchment groups in securing additional funding beyond the ORC investment. The capacity of ORC's staff to take on this expanded role must be carefully assessed to ensure that the long-term management of the funding allocation process is sustainable.

Likely Timescale to Full Implementation

The full implementation of this funding model could take up to five years, with a phased approach to completing CAPs across the region. During this period, many communities may face delays before they can access funding. This delay may create challenges for communities that are still in the early stages of the CAP process, potentially leading to dissatisfaction from ratepayers and environmental groups in those areas.

Suitability of the Model Against ‘Large-Scale’ Funding Outcomes and Principles

The proposed funding model aligns with the goal of intergenerational environmental impact, as it supports long-term, community-driven planning efforts. The ICM process inherently encourages collaboration, making it an ideal mechanism for achieving system-wide environmental improvements. However, the allocation framework must avoid introducing overly competitive grant processes, which could undermine the collaborative nature of the work.

The funding approach is also in line with ORC’s strategic direction, provided that the prioritisation of funding is carefully managed. The challenge will be ensuring that the implementation of the plans remains focused on the most impactful actions, rather than prioritising smaller, easily achievable projects in the short term.

Analysis of the Model’s Strengths, Opportunities, Weaknesses and Risks

The model offers a structured, data-driven approach to funding that aligns well with ORC’s strategic goals and encourages community collaboration. It incentivises communities to engage in planning and provides clear pathways to support CAP implementation. However, its reliance on community readiness and participation could lead to disparities in funding allocation, with underserved catchments potentially missing out.

The model’s success depends on strong governance and coordination, and if these are lacking, the model risks creating inefficiencies and uncoordinated project delivery. Financially, the model may strain ORC’s resources, especially if external funding sources are not secured, and operational capacity will need to scale to meet the growing demand.

Financial and Operational Considerations

The sustainability of funding is a key challenge, as the growing number of CAPs and their implementation needs may reduce the impact of investments over time. Communities may also come to expect ORC as the sole funder, which could strain long-term feasibility. Additionally, managing the process may require more internal resources than ORC can currently provide.

If MfE funding ends, ORC will need to identify alternative sources, potentially increasing pressure on internal budgets. As CAP implementation expands, resource demands will rise, risking inefficiencies if initiatives are addressed on a catchment-by-catchment basis instead of through regional strategies. Effective management and strategic adjustments will be necessary to ensure long-term success.

Devolving ‘Large-Scale’ Funding to a Third Party to Administer and Grow

Introduction to the Model and Procurement Approach

Devolution, in this context, refers to ORC transferring some of its authority to a third-party entity to manage large-scale environmental funding. This model involves ORC either allocating the funds to an entity within the ORC legislative system (such as Port Otago) or to an external entity with expertise in grant-making or fundraising. Under this model, the third-party organisation would manage the funds and possibly leverage additional investment. The devolution arrangement would be formalised under a service agreement, ensuring clarity on service levels, performance measures, costs, and risk management. This model aligns with Section 17A(5) of the Local Government Act (LGA, 2002), which allows the delegation of responsibilities to third parties, provided the arrangement meets specified legal and contractual requirements.

Governance of the Model

For effective implementation, ORC would need to identify a suitable third-party partner, negotiate terms, and establish a contract to ensure the strategic goals of the funding align with ORC’s objectives. The governance responsibility would shift to the contracted entity, with ORC’s role being largely oversight-oriented, ensuring the contract is adhered to, rather than managing the allocation of funds directly. If Port Otago were selected as the partner, funding allocation would fall under their Statement of Intent and Annual Report, requiring ORC’s sign-off. Note that Port Otago has not yet been consulted as part of this project.

Fund Allocation Process

Once a third-party entity was contracted, it would establish systems to allocate and administer the large-scale funding. The process would align with Government Procurement Rules and ensure transparency. ORC might retain a role in monitoring the process, potentially having representatives on the evaluation or fund allocation panels. The third party could also be responsible for leveraging additional funds, with the arrangement managed through a suitable contracting mechanism. Post-fund allocation, the third-party entity would report to ORC on outcomes, ensuring transparency and accountability.

Ongoing Management of the Model

Day-to-day management of the fund would be transferred to the contracted entity, reducing ORC’s administrative burden. However, ORC would still need to monitor the contract to ensure effective delivery, with regular reports on performance against KPIs. While the third-party entity would take on the primary management, ORC would retain obligations to ensure the public funds are used effectively. This would require ongoing internal capacity to oversee the contract and ensure value for money. The third-party entity would also likely charge an administrative fee, depending on their existing capabilities.

Likely Timescale to Full Implementation

This model could be implemented in the short term if a suitable third-party entity is identified. However, leveraging additional funds to expand the pool of available investment would likely take longer.





Suitability of the Model Against ‘Large-Scale’ Funding Outcomes and Principles

The success of this model in achieving intergenerational impact depends on how well the third-party entity prioritises funding and aligns this with ORC’s strategic goals. While the entity may bring expertise and efficiency, maintaining a strong alignment with ORC’s strategy and fostering collaboration across the system could prove challenging. Additionally, there is the risk of reducing direct council influence over funding decisions, making it harder to ensure investments align with long-term environmental goals.

Analysis of the Model’s Strengths, Opportunities, Weaknesses, and Challenges

The model’s key strengths include reducing the internal administration burden on ORC staff, enabling more efficient procurement outcomes through specialised expertise, and allowing ORC to remain at arm’s length from the process, thus minimising perceived conflicts of interest. This could also make the fund more appealing to co-investors and provide cost-effective solutions for ORC. Opportunities presented by the model include potential for increased leveraging, co-investment, and philanthropic opportunities, along with more equitable funding decisions by pooling funds across organisations. It may also provide access to charitable tax exemptions, enhancing the fund’s value.

However, weaknesses include the need for a portion of ORC’s investment to be allocated as overhead costs, a potential lack of suitable entities to administer the model, and the requirement for significant ORC oversight. The model may also take time to become operational and achieve its intended outcomes. Key risks involve reduced transparency of ratepayer funds, the challenge of finding an entity with the appropriate local knowledge, and potential reputational risks to ORC if the contracted entity fails to meet expectations or causes misalignment with community values. Following this analysis, the Councillors opted to exclude this model from further consideration as a suitable mechanism for large-scale environmental funding allocation.

Financial and Operational Implications

The financial implications of devolving large-scale funding to a third-party entity include the potential dilution of available funds, as a portion would be allocated to cover the administration costs of the contracted entity. This could reduce the amount of funding available for direct investment in environmental initiatives. Additionally, the ability of the third-party entity to leverage additional investment for ORC may be limited, and there may be concerns around achieving value for money if the entity lacks the capacity to deliver effectively. Operationally, the model would require substantial internal capacity from ORC to oversee the third-party arrangement, monitor contract performance, and ensure alignment with ORC’s strategic goals. The process of identifying and establishing a suitable third-party partner could take time, and there may be challenges in finding an entity with the regional reach and expertise necessary to manage the funds effectively. Furthermore, the model may create inefficiencies if multiple entities are required to cover different regions or if the contracted entity lacks sufficient experience or regional coverage in environmental funding initiatives.



Joint Venture – Collaborative or Co-Funded Arrangement

Introduction to the Model and Procurement Approach

Under Sections 12 and 14 of the Local Government Act (2002), regional councils can collaborate with other local authorities and organisations to enhance community benefits, provided the arrangements serve the broader district or region. The proposed model leverages joint activities or co-funded arrangements to promote environmental outcomes by combining resources and expertise. Collaborative models range from informal partnerships to formal joint ventures, with the latter being more structured and appropriate for large-scale environmental funding allocations. This approach can involve multiple partners, such as other local authorities, community organisations, or iwi-based entities, and may include co-investment agreements or philanthropic partnerships.

Governance and Management of the Model

Collaboration requires strong governance and management frameworks, adaptable to the needs of the partners. Successful collaboration depends on shared leadership, regular engagement, and clear decision-making roles. At the governance level, this could involve formal partnerships or a Memorandums of Understanding (MoUs) outlining responsibilities, with an emphasis on transparency and accountability. Key management considerations include resource allocation, cost management, and evaluating the success of the collaboration. Clear roles and shared objectives at both governance and operational levels are essential for maintaining a successful joint venture.

Fund Allocation Process

In a collaborative model, funds would be managed by a collective governance group (representing all the partners), with one partner taking a leading role in administering funds. The fund allocation would likely start with a conditional grant process and evolve into more structured procurement over time as the venture matures. The collective governance group, would be responsible for overseeing the allocation and monitoring of funds, ensuring that decisions align with the joint venture’s goals. Over time, the scale of the investment and the partners’ roles may evolve, which could influence decision-making and funding priorities.

Likely Timescale to Full Implementation

Establishing a successful collaborative model is a long-term process, often taking several years to develop and implement. Factors like organisational alignment, leadership commitment, and funding cycles must be synchronised across all partners. Given the strength of existing relationships, implementing this model could take up to five years, although it may progress more quickly under favourable conditions.

Suitability of the Model Against ‘Large-Scale’ Funding Outcomes and Principles

This model supports long-term, intergenerational environmental impacts through collaboration, especially with mana whenua and other key partners. For it to succeed, partners must align their priorities and strategies to maintain the collaboration beyond individual budget cycles. The model also fosters a culture of innovation and coordination, with ORC taking a leadership role in facilitating collaboration across levels of local government and with external partners.

Analysis of the Model’s Strengths, Opportunities, Weaknesses, and Challenges

The collaborative joint venture model offers several strengths, including the potential to scale up time, reduce administrative costs, and leverage additional funding for better environmental outcomes. However, challenges include aligning priorities across diverse partners, achieving equitable funding contributions, and managing the political risks associated with joint ventures.

Financial and Operational Considerations

Financial and operational implications, such as aligning planning cycles and ensuring the sustainability of the arrangement, must also be considered. The model’s success relies on strong, trust-based relationships and clear, consistent leadership across all partners.

Establish a Council Controlled Organisation (CCO)

Introduction to the Model and Procurement Approach

The Local Government Act (2002) allows local authorities to establish Council Controlled Organisations (CCOs) for both commercial and non-commercial activities. A CCO could take various forms, such as a Trust, Joint Venture, or Partnership, and would be responsible for administering environmental funding or grants on behalf of the ORC. Amendments to the Act (July 2004) provided clarity on CCO structures and functions. The establishment of a CCO could allow ORC to manage large-scale environmental projects independently, leveraging additional investments and potentially gaining tax incentives. However, the model’s success depends on governance, financial oversight, and alignment with ORC’s objectives.

Governance of the Model

Establishing a CCO requires significant time and resources. The process includes community consultation, policy development for appointing directors, and establishing governance structures. Initially, ORC would retain some governance oversight but gradually move to an arm’s-length relationship once the CCO was operational. The CCO would then manage funding allocation processes independently, in alignment with ORC’s broader objectives.

Fund Allocation Process

The CCO would assume responsibility for allocating environmental funding, with transparency ensured by aligning with Government Procurement Rules. The process could initially involve conditional grants, with opportunities for future co-investment and leveraging additional funds. ORC would maintain oversight through contractual agreements, ensuring the CCO’s activities aligned with expected outcomes.





Ongoing Management of the Model

Once established, the CCO would operate independently, with funding decisions made by its governance board. ORC would monitor performance through contracted outputs and outcomes but would not directly control funding decisions. There is potential for the CCO to attract additional funding through donations and bequests, further enhancing its capacity to invest in environmental initiatives.

Likely Timescale to Full Implementation

Establishing a CCO would involve a detailed statutory process, including community consultation. Given the time and resources required, full implementation is expected to take at least five years, if consultation on this model was included as part of the 2027-2037 Long Term Plan cycle during the 2027-2037 Long-Term Plan cycle.

Suitability of the Model Against ‘Large-Scale’ Funding Outcomes and Principles

The CCO model can provide intergenerational impacts by operating outside of local government planning cycles, allowing for more sustainable funding of large-scale environmental projects. However, there is a risk of misalignment with ORC’s strategy, particularly if the CCO receives funding from other sources with differing priorities. Collaboration and community engagement could be enhanced through this model, but careful management is required to ensure alignment with ORC’s long-term objectives.

Analysis of the Model’s Strengths, Opportunities, Weaknesses, and Risks

The strengths of the model include the ability to establish an independent entity with a separate identity, which could enhance engagement with communities and attract funding from a broader range of sources, including donations, bequests and philanthropic contributions. The model also allows for charitable tax advantages and introduces a skills-based governance structure, enabling more commercially focused decision-making while protecting Council from financial liability.

Opportunities were identified in the potential to leverage additional investment to increase the total funding pool for environmental outcomes. The model could support innovative funding arrangements and enable greater regional reach and community empowerment through more direct involvement in funding decisions. It also creates access to revenue streams not available to Council, broadening the base for investment.

Despite these advantages, the model has a number of operational and financial drawbacks. It would require significant time and resources to establish, including the development of separate governance and accountability frameworks. The administrative and governance costs may outweigh the benefits, particularly in the short term, and additional workload would likely fall to existing Councillors and staff. There are also risks that investment decisions could shift away from ORC’s strategic priorities, potentially reducing transparency and accountability to ratepayers.

Key risks include the model being perceived as costly with limited immediate benefit, especially if additional investment is not secured early. There is also a risk that Council’s environmental expertise becomes disconnected from decision-making, and that reputational risk becomes more difficult to manage at arm’s length.






Financial and Operational Implications

The CCO model requires ongoing operational and financial commitments from ORC, including staffing, governance, and monitoring responsibilities. Financial sustainability is a key consideration, and the potential for leveraging investment must be carefully evaluated. The model’s success depends on ORC’s ability to maintain oversight while allowing the CCO to operate effectively and independently.

Prioritised Funding Model Analysis

- Following the presentation of the above models, Council was guided through a prioritisation exercise which determined the following:
- Increasing the scope of the current ECO Fund model to support large-scale environmental initiatives was deemed inadequate to achieve the council’s desired outcomes and was thus excluded from further consideration.
 - A more defined, contestable investment model with clear criteria and qualified suppliers was considered promising. However, it was agreed that further investigation should explore this option alongside a model that supports the implementation of the Integrated Catchment Management (ICM) process and associated Catchment Action Plans.
 - Models involving third-party organisations to administer or grow funding were discounted due to concerns over eroding transparency for ratepayers.
 - A collaborative, co-funded model was seen as an aspirational goal, though ORC recognised that its implementation would require time and a well-defined plan. This model will be explored for potential medium- to long-term development.
 - The establishment of a separate entity, such as a Trust or CCO, to manage and grow ORC funds was recognised for its potential to attract additional philanthropic investment. However, ORC noted that this approach involved significant upfront costs, time, and trust-building efforts. Further investigation into this model’s viability over the long term should be undertaken.

A summary of the prioritisation decisions for each model is summarised below:

Funding Model		Model Prioritised for Further Consideration
Large-scale contestable or grant making Fund		
Structured Purchasing Approach		
Funding via the ICM Programme or by CAP		
Devolving 'large-scale' funding to a third party		
Joint Venture		
Establish a CCO		

Prioritised Funding Model 1 - Structured Procurement Aligned to CAP Implementation

Introduction to the Model and Procurement Approach

Following the second Councillor Workshop, a hybrid funding model was proposed that integrated a structured procurement approach with the Integrated Catchment Management (ICM) framework. This model aims to align funding decisions with Catchment Action Plans (CAPs), ensuring that large-scale environmental initiatives are supported with greater clarity, efficiency, and transparency. The model suggests a multi-stage procurement process, where organisations first complete a self-assessment against eligibility criteria, followed by submitting a Request for Proposal (RFP). **This does not imply that an overly complicated or lengthy process needs to be established, with the requirements of the ‘proposal’ being at the discretion of ORC.**

The funding would be linked directly to CAP implementation, ensuring investments are informed by scientific evidence, community needs, and mana whenua engagement. This structured approach would aim to strengthen the alignment between funding decisions and the Council’s strategic objectives for environmental management.

The model addresses the current gap in funding available for CAP implementation. While there is a one-off \$100,000 investment for the Catlins CAP, no ongoing funding mechanism currently exists for the broader rollout of CAPs across the region. By using a structured procurement approach, ORC could ensure fair, transparent funding allocation based on pre-determined eligibility criteria. However, it’s acknowledged that this hybrid model has limitations, particularly in the short term, as not all CAPs are yet completed, and there is variability in the level of CAP development across communities.

Governance of the Model

The governance structure for this hybrid model would follow standard procurement practices, with oversight provided by ORC to ensure adherence to procurement best practices and policies. Councillors would play a key role in ensuring transparency, though they should not be part of the Evaluation Panel to avoid conflicts of interest, particularly as multiple catchments may compete for funding. Given the significant involvement of ORC staff in the ICM and CAP processes, they too should be excluded from decision-making to maintain the integrity of the funding allocation process.

Fund Allocation Process

The funding allocation process could be a two-stage process: first, interested organisations would submit a Registration of Interest (ROI) to assess their eligibility to apply for funding. This will be followed by a more detailed proposal submission through an RFP process. Alternatively, ORC could consider a closed competitive or direct sourcing model, particularly for specific CAPs that are region-specific.

This hybrid model could include a structured procurement approach that incentivises communities to align with the CAP framework, the structured procurement process with incentives for communities to align with the CAP framework. This would include stringent eligibility criteria weighted towards organisations actively engaged in the CAP process or those with an endorsed CAP Implementation Plan.

Key elements of the allocation process would include the use of a suitable procurement platform, clear procurement documentation, and an independent Evaluation Panel to assess proposals. Successful applicants would enter detailed contracts with ORC outlining deliverables, milestones, and monitoring expectations. Additionally, robust contract management processes will be established to ensure effective monitoring and evaluation of funded initiatives.

This model would aim to balance transparency, fairness, and the need for structured procurement, while also incentivising the development and adoption of CAPs across communities. However, careful consideration must be given to the diversity of communities and their readiness to meet procurement thresholds.

Ongoing Management of the Model

The Environmental Delivery Team at ORC could be responsible for managing the procurement and delivery under this model. While the team is equipped to oversee delivery and monitoring, additional resource may be required to establish procurement structures and processes. The model's administrative efficiency allows for a single funding round over two years, streamlining allocation of the \$4 million that is currently approved.

Contracting mechanisms such as rights of renewal and stop-go clauses are recommended in contract processes. Effective contract monitoring and a resource mapping exercise are necessary to ensure ORC has the right capacity and capability.

Likely Timescale to Full Implementation

Implementation is feasible within the year, with recommended contracting period of 1 January 2026 to 30 June 2027. Meeting Government Procurement Rules and ensuring strong internal and external communication will be key to delivering the model on time.

Suitability of the Model Against 'Large-Scale' Funding Outcomes and Principles

This model strongly aligns with the goals of intergenerational impact, system-wide collaboration, and strategic direction. It supports long-term, community-led CAP implementation underpinned by evidence and mana whenua engagement. Risks remain where CAP development is uneven or delays funding eligibility for some communities. Strategic alignment may be challenged if short-term wins are prioritised over higher-impact, complex work.

Analysis of the Model's Strengths, Opportunities, Weaknesses and Challenges

This model offers strong alignment between ORC's organisational strategy and community priorities, as it is underpinned by data, evidence, and community-led planning. The approach establishes a clear pathway from development to implementation, enabling a region-wide, consistent process that gives communities confidence their priorities will be supported once a Catchment Action Plan (CAP) is in place. Internally, ORC already has structures in place supporting the ICM process and the sequencing of CAP development across all catchments. This existing framework provides a strong foundation for scaling the model.

The collaborative nature of the CAP process—which brings together ORC, mana whenua, landowners, and community groups—fosters meaningful partnerships. The model incentivises communities to engage in the planning process, particularly when there is a clear signal that implementation funding may follow. With community engagement likely to increase, ORC has an opportunity to strengthen its credibility by committing to support action following the completion of CAPs.

Moreover, the CAP process is designed to generate robust data and evidence, which can assist ORC in measuring environmental impact. Until CAPs are completed across all catchments, existing strategies and frameworks could help guide equitable funding allocation. Overall, this model creates a promising platform for enhanced collaboration, stronger relationships with partners, and increased coordination between stakeholders.

There may be limited capacity within some catchment groups to manage and administer funding. Internally, while ORC has strong technical expertise for CAP development, additional procurement capacity may be required to deliver and administer funding under this model effectively.

Short-term equity in funding distribution is another concern. If eligibility hinges on having an approved CAP, those without one may be disadvantaged, creating perceptions of unfairness. Not all communities have mature entities able to receive and manage funds, which could limit access further. There is also a risk that new processes could inadvertently duplicate existing mechanisms, such as the ECO Fund or other small grant programmes, particularly if large-scale funding is then redistributed to support smaller local initiatives.

Financial and Operational Implications

Clear guidance will be required to define appropriate use of funds once they are allocated, ensuring new or duplicative grant processes are not inadvertently created.

From an operational perspective, as CAP development and implementation activities increase, ORC will likely need to adjust internal work programmes and consider how to effectively support delivery. Managing community expectations could also be a key challenge, particularly in areas where CAPs are under development but not yet approved. In addition, developing projects on a CAP-by-CAP basis may result in duplication or inefficiencies, especially if broader regional approaches are overlooked.

The model may also require differing funding criteria and prioritisation frameworks, depending on the stage of CAP development in each community. While this may help achieve broader geographic coverage, it introduces the risk of inconsistency and confusion, particularly if variable approaches are not well-communicated or coordinated.

Pathway and Conditions to Model Implementation

The model is viable in the short-to-medium term, with a focus on establishing robust procurement and relational agreements, targeting capable providers, and clearly defining eligibility criteria. For full CAP alignment long-term, further feasibility work is needed. This includes exploring funding equity for areas without CAPs and potentially accelerating CAP development through investment in community readiness and internal capacity building.

Prioritised Funding Model 2 – Investing in Large-Scale Environmental Initiatives via a Joint Venture or Co-Funding Arrangement

Introduction to the Model and Procurement Approach

This model presents a medium to long-term opportunity for ORC to co-invest in large-scale environmental initiatives through collaborative arrangements such as joint ventures or co-funding partnerships. Initial engagement with potential partners has been encouraging but remains at a preliminary level, with no formal commitments secured.

Pathway and Conditions to Model Implementation

Although promising in concept, the feasibility of this model depends on a range of factors that have yet to be explored in depth. ORC would need to undertake a staged process over the next two to three years to test viability, starting with internal feasibility and cost-benefit analyses. Strategic discussions should be initiated with both statutory partners (particularly mana whenua and local authorities) and potential philanthropic investors such as Otago Community Trust and Central Lakes Trust.

If interest is not established locally, exploration with national partners such as DOC, MfE, or private environmental funders may be warranted. Internally, resource planning and policy development would be required to build a suitable governance, contracting, and accountability framework.

Given the complexity and scale of what this model entails, it is anticipated that a minimum of three to five years would be required to fully operationalise a joint venture or co-funded model. Its success will depend on Council's long-term commitment and the prioritisation of investment and relationship-building to support this collaborative approach.

Prioritised Funding Model 3 – Investing in Large-Scale Environmental Initiatives via a New, ORC-Owned CCO

Introduction to the Model and Proposed Procurement Approach

This model explores the establishment of a Council-controlled organisation (CCO) or charitable trust owned by ORC, as a mechanism for administering large-scale environmental funding. While it has been included at the request of ORC for consideration as a medium to long term option, further feasibility work is required to fully assess its viability in the long term.

Pathway and Conditions to Model Implementation

The report stops short of recommending whether ORC should proceed with this model at this stage, as further analysis is required. Specifically, the appetite of ratepayers for creating a new entity and the actual costs of management, governance, and compliance under the Local Government Act (2002) have not been assessed.

Should ORC wish to explore this model further, several key steps will be required over the next two years. These include a comprehensive financial and feasibility study to assess setup and operating costs, and formal community consultation either through a standalone process or as part of the Long Term Plan 2027-37 consultation process to assess the level of public support for this approach. In parallel, ORC would need to allocate internal resources to define the required governance, legal, policy, and accountability structures needed to establish and manage the CCO. Consideration should also be given to whether this model could administer a broader suite of environmental funding beyond the current 'large-scale' fund.

While potentially offering a long-term solution for delivering regional environmental outcomes, the model will require significant time, resource, and public backing to become operational, and is therefore best considered as a medium to long-term option.

Recommended Approach

Recommended Procurement Approach

We recommend that ORC adopt **Prioritised Option 1 – Structured Purchasing through ROI, RFP or Direct Engagement processes, aligned where appropriate to the Catchment Action Plan (CAP) implementation process**. While this may not fully align with the hybrid model initially proposed, we believe it offers the most workable solution for effective fund allocation in the short to medium term.

This approach considers ORC's current appetite for risk, internal capacity, the strength of existing partnerships, and the uneven readiness of communities and entities to deliver at scale. It also addresses the potential inequities of a model that relies too heavily on the evolving CAP framework.

We assume that critical enablers such as a clear definition of 'large-scale', robust eligibility criteria, and strong procurement practices are developed and implemented in support of this approach.

Recommended Governance Model

We recommend that the governance of this model sits with the CEO and Council, consistent with existing procurement protocols and the CAP process. Continued engagement with mana whenua at a governance level remains a key feature of this model.

Recommended Fund Allocation Process

The proposed fund allocation process mirrors the approach outlined in Section 8.2 of our full report. To ensure the success of this model, we recommend complementary actions such as developing communications material, and retaining a portion of funding for evaluation, education, and capability development.

Recommended Ongoing Management Model

This model does not exclude prioritising the CAP process as an eligibility criterion or using the fund to encourage CAP engagement. However, the CAP framework should not be the sole determinant of fund allocation.

Recommended Timescale for Use

This model is ready for immediate implementation, with allocations possible by the end of the calendar year. Contracts would begin from January 2026 and run through to 30 June 2027. We recommend that this model guide the first two to five years of the fund's operation, including the current commitment and into the next Long-Term Plan cycle.



Proposed Plan and Timeline to Implementation

Using our recommended funding model and approach outlined in Section 9.1 of our full report, we have provided a high-level timeline of key deliverables and dates that ORC will need to refine and confirm if large-scale funding is to be allocated before the end of Q2 of the financial year (that is 31 December 2025).

Our recommended implementation plan including key activities and likely due dates is outlined below:

Phase 1 – Confirm the Recommended Approach and Obtain Required Signoffs	
Deliverable	Due Date
Gain endorsement of the recommended approach internally within ORC	30 April 2025
Report presented to Council for decision making	Wed 21 May 2025 (Council meeting)
Phase 2 – Confirming the Eligibility Criteria and Procurement Timeline	
Deliverable	Due Date
Develop and agree internally eligibility criteria and pre-procurement approach	6 June 2025
Prepare and agree internally high-level procurement plan	6 June 2025
Prepare and submit Council Report including eligibility criteria and detailed procurement plan	11 June 2025
Obtain sign off from Council on eligibility criteria and detailed procurement plan	Wed 25 June 2025 (Council meeting)
Phase 3 – Communication and Engagement with the Sector including mana whenua on agreed approach	
Deliverable	Due Date
Develop and agree a communications and engagement plan including key messages and timeframes for delivery	Throughout July and August 2025
Update mana whenua and local authority partners on the project and the outcomes of the review and report	
Update stakeholders who contributed to the project on the outcomes of the review and report	
Prepare and circulate key messages to ensure accurate messaging to those not directly involved in the consultation	
Phase 4 – Procurement Planning and Implementation	
Deliverable	Due Date
Draft procurement documentation completed and ready for release to GETs (or other suitable procurement platform). At a minimum, documentation should include: – RFP documentation – Draft contract – Evaluation criteria and scoring system	TBC due to Council diaries
Procurement live on GETs	TBC
Hold a supplier briefing with interested TBC	TBC
ROI process closes with those organisations meeting the ‘pre-procurement’ eligibility criteria submitting their intentions formally	TBC
Formal RFP closes with short listed applicants having the opportunity to present their proposal in an alternative format (such as presentation)	TBC
Responses are formally evaluated by an appointed evaluation panel that includes ORC management and other experts (but not elected members)	TBC
Due diligence is conducted	TBC
Report procurement outcomes and recommendations to Council for endorsement and/or approval	TBC
Negotiations and contracting commences with preferred suppliers	TBC
Contracts are awarded and unsuccessful organisations debriefed	TBC
Research and evaluation frameworks and parameters are established	TBC
Contracts are enacted and delivery commences, with contract monitoring taking place regularly between ORC and organisations	TBC
Investigations into the feasibility and validity of other preferred funding model options is undertaken.	1 January 2026 to 30 June 2027

Recommendations

Eligibility Criteria and Definition Related Recommendations

- A detailed eligibility criteria to allow community organisations to assess whether they align to ORC’s intended outcomes and expectations is needed to support implementation of the fund. At a minimum, we propose that this criterion should include how organisations will demonstrate the following:
 - Achieve alignment to intergenerational aspirations of mana whenua, with a demonstrated level of support obtained for the initiative from mana whenua/papatipu rūnaka.
 - Directly contributes towards achieving priorities identified by ORC and provide a line of sight to those priorities outlined in documents such as Catchment Action Plans.
 - Initiatives or projects sufficiently meet the intent of ‘large-scale’ from an ecological perspective (that is, a multifaceted approach to enhancing the overall biodiversity of an area, rather than focusing on one element such as invasive mammal control).
 - Investment allows for an increase in scale and/or impact of those projects and initiatives that are already in place (rather than funding new projects or ideas), that are already contributing towards environmental outcomes and that demonstrate value for money.
 - They are a legal entity, able to demonstrate they have capacity, capability, and stability (governance and financial for example) to deliver ‘large-scale’ initiatives.
 - Initiatives that are community-led with a high degree of collaboration at all levels of the system (including local authorities, mana whenua, landowners and other stakeholders).
 - The extent to which they can act as an umbrella entity and/or collectives of organisations (this should be encouraged but only where appropriate governance and management structures are in place to effectively deliver on requirements).
 - Their commitment to work together in partnership (with ORC and others), to further enhancing collaboration, community activation and sustainable funding and leverage opportunities beyond the initially agreed investment term.
- Continue to engage and consult with mana whenua through the next phases of fund development and implementation.
- Determine and agree the size and scale of investment that ORC deems reasonable and appropriate in relation to this fund (for example, is a \$100,000 or a \$500,000 investment considered reasonable) and the overall risk appetite of Council.

General Procurement and Funding Recommendations

- Agree and communicate internally and externally, a clear implementation plan that sets out reasonable timeframes for the process to procure, review, and award funding, allowing communities and organisations to plan and upscale where needed. This will ensure that communities and providers are not set up to fail.
- Following the procurement process, enter into multi-year funding agreements with organisations that aligns with the budget decisions under the LTP (that is \$4 million over two financial years), noting that this is likely to only be around 18 months under the current approved funding.
- ORC should consider including a stop/go mechanism or right of renewal clause in funding agreements for successful organisations (up to a maximum of five years would be recommended – that is 2+3 years) to align with future LTP cycles. This would reduce the procurement administration required to administer a fund and provide reasonable timeframes for initiatives to achieve ‘large-scale’ impact (outcomes cannot be achieved in 18 months).

- The investment and permitted use of the funds allows for all types of costs to be met that are deemed reasonable and relevant including staff and personnel, administration costs, and costs to support education, evaluation, and monitoring of deliverables.
- Within the parameters of the fund, ORC allows for the use of some funds to support and enhance organisational capability (management and governance) to strengthen the overall system, as well as to support education, and evaluation and monitoring initiatives.

Specific Recommendations in Relation to Each Prioritised Funding Model

We have outlined a number of recommendations that ORC could consider across the three prioritised funding models. The outcomes from our recommendations under each model will help inform what the most appropriate long-term model to govern large-scale environmental investment will look like for ORC (for example, the outcome of community consultation in relation to establishing a CCO or Trust will contribute towards whether this model is likely in the long-term).

These recommendations were outlined in Sections 8.2-8.4 of the full report but are summarised below:

Structured Procurement Aligned to CAP Implementation

- Determine a process for equitable distribution of funding to those catchments that still will not have a CAP in place by 2028/29 or accelerate the timeline for development of CAP’s.
- Ensure that all elected members as well as those staff working directly with communities in the development and implementation of CAPs are excluded from procurement evaluation and decision-making to manage perceived or actual conflicts of interest.
- Undertake further analysis and feasibility to the ongoing use of the model to ensure an equitable process for distributing ‘large-scale’ funds to those communities/catchments that do not or will not have an approved CAP in place by 2028/29.
- Develop a comprehensive assessment and prioritisation criteria to allow for objective investment decisions to be made as to the use of ‘large-scale’ funding. This recognises that as more CAPs are completed, not all activities within a CAP, and not all CAPs will be able to be funded.
- Consider the long-term allocation criteria of this funding model and the reach and impact that can be achieved if it becomes diluted across multiple CAPs.

Joint Venture of Co-Funding Arrangement

- Undertake detailed feasibility and financial analysis to better understand the internal and administrative costs required to govern, manage, and administer such an arrangement. This should provide an assessment of the costs and benefits to ORC and the community by having such a model. This may or may not be an initial first step and may need to be conducted once partners have been identified and indicated a high-level intention to partner or co-invest.
- Begin more formal conversations with potential statutory joint venture/co-funding partners to determine the scope of opportunity that is available. Initial discussions should be prioritised with mana whenua as well as the existing local authority partners in Otago.



- Depending on the outcome of the recommendation above, begin more formal conversations with potential community or philanthropic joint venture/co-funding partners. Initial discussions should be prioritised with Otago Community Trust (as they have already expressed an interest), as well as other funders operating within ORC boundaries, particularly Central Lakes Trust, Whakatipu Community Foundation and the Community Trust of Southland.²
- If this model cannot be progressed locally (due to insufficient interest or commitment), seek to begin discussions with other potential joint venture or co-funding partners outside of the Otago region. Possible entities to engage could include (but are not limited to) DOC, MfE, The Nature Conservancy, NZ Nature Fund and NEXT Foundation.
- Direct internal resources to work through the policy, contracting, financial and accountability requirements needed to establish a structure under this model. This will also need to determine the levels of internal resource that will be needed to establish as well as maintain a joint venture or co-funded model. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.

Establish a Non-Commercial CCO such as a Trust

- ORC undertakes or commissions a detailed feasibility and financial analysis to better understand the internal and administrative costs required for the CCO/Trust to meet its planning, management and auditing requirements under the LGA (2002). The findings of this should be included in the community consultation process to allow ratepayers to make their own value for money assessment of the model.
- ORC undertakes community consultation as required under the LGA (2002) to determine the level of support for the establishment of a CCO/Trust. For efficiency, this should be undertaken as part of the consultation process for the ORC Long Term Plan 2027-2037.
- Direct internal resources to work through the policy, financial and accountability needed to establish an entity (if approved). This will also need to determine the levels of internal resource that will be needed to establish as well as maintain the CCO/Trust, including the development of a constitution or Trust Deed, policy for the appointment and remuneration of Directors/Trustees, and the procurement or contracting policies that may be needed to oversee the allocation of funds to the new CCO/Trust. This should also consider the opportunities to expand the scope of funding included within the arrangement outside of the current 'large-scale' budget.

² Note that we did not consult with CLT or CTOS through this process so are unaware of their level of interest to engage in further discussions at this point.

	7.4.1 Large-Scale Contestable/Grant Making Fund	7.4.2 Structured Purchasing Approach – Registration of Interest (ROI) and Request for Proposal (RFP)	7.4.3 Funding via the Integrated Catchment Management Programme or by Catchment Action Plan	7.4.4 Devolving 'Large-Scale' Funding to a Third Party to Administer & Grow	7.4.5 Joint Venture – Collaborative or Co-Funded Arrangement	7.4.6 Establish a Council Controlled Organisation (CCO)
Strengths	<ul style="list-style-type: none">• The administration and management of the funds can be undertaken internally within the existing systems that are already in place.• This model could be implemented within a short time frame (quick to stand up).• Has the ability to fill an immediate gap created by the ending of Jobs for Nature funding.	<ul style="list-style-type: none">▪ Clearly defined procurement process and can direct funding to address higher priority issues or communities.▪ Allows ORC to establish and communicate clear outcomes, requirements and criteria for which purchasing decisions will be made. This can help identify a short list of suitable providers early in the process, and let others know whether they align with Council expectations. This can save everyone time and money.▪ It is likely to be less time and resource intensive than a competitive grant allocating process and there is only likely to be one funding round over the three years (allowing for three-year contracts to be put in place).▪ It can allow for greater innovation and collaboration during the procurement process, particularly if the council provides a market briefing at the start of the procurement process, allows Q&As to be submitted as part of the process, or where a multi-stage process is run.	<ul style="list-style-type: none">▪ Provides a systematic and structured approach to funding that is grounded in the key principles and outcomes Council seeks to achieve.▪ Allows for a stronger alignment of organisational strategy to community strategy and implementation and community action.▪ Can allow for a phased implementation of the funding approach, that can align to CAP development.▪ A precedent for the process is already set with the CAP process in place. This will continue to evolve and develop in line with best practice.▪ Supports the implementation of a data driven approach which is already supported by ORC and other key partners and is endorsed by mana whenua.▪ The implementation plans are endorsed and supported by ORC, mana whenua and the community and are therefore 'implementation ready' and will require little planning and lead in time before delivery can begin.▪ There is an internal structure already in place to support the coming together of catchment groups and supporting plan development. Allocation of funding through this model could be achieved quickly and cost effectively (but would still require additional resource).▪ Supports cross sector and cross partner/stakeholder collaboration.	<ul style="list-style-type: none">▪ It reduces the internal administration and capacity requirements on ORC staff to administer and manage the funding/ procurement process.▪ It can allow for more efficient and effective procurement outcomes if contracted entities acting on behalf of ORC have the skills and expertise currently not held within Council.▪ Can keep the Council at arm's length from the procurement process and delivery, which can reduce the perception of conflicts of interest, make the fund more attractive to co-investment opportunities, and may be viewed more favourably by the community and stakeholders.▪ The contracted entity may be more cost effective in providing skills and expertise needed depending on overhead structures and costs.	<ul style="list-style-type: none">▪ The model can be developed and scaled up over time – it can grow and evolve as it becomes more mature and embedded, for example, growing the number of partners involved, the level of funds committed or the addition of non-government partners in the joint arrangement.▪ Has the ability to reduce administration and compliance costs of grant making and procurement activities in environmental initiatives across local authorities in the region.▪ Greater coordination of investment decisions across local authorities can strengthen capacity and capability in this area.▪ Provides opportunities for ORC to leverage additional investment and funds that contribute to enhanced environmental outcomes.▪ Allows ORC to take a clear leadership role with their stakeholders and partners.	<ul style="list-style-type: none">▪ The entity can have a separate brand and identity that distances it from the Council. This can allow for more meaningful engagement with communities and potential funders/donors.▪ The entity could access charitable tax benefits and leverage charitable benefits and additional investment.▪ The entity can leverage additional investment in the way of donations, bequests or investments. People may be more likely to make these types of directed donations to a charitable entity over a council entity.▪ An independent governance board and structure removes funding decisions from political decisions.▪ A skills-based governance board allows for improved commercial and investment decision making.▪ Financial risk is ring-fenced under a charitable or incorporated society structure which protects ORC from financial liability from an activity or another party.▪ Separation of financial from political decision making.
Opportunities	<ul style="list-style-type: none">• Allows ORC to examine and realign all types of funding under the broad ECO Fund banner to ensure that all types of 'needs' are met across the range of available funds.• A consistent approach to fund establishment, allocation and management can provide opportunities to better understand and articulate return on investment.	<ul style="list-style-type: none">▪ It can drive innovation and collaboration and gives communities a greater ability to propose and outline how they will address the Council's issues/priorities/requirements.▪ Can enable opportunities for Council and providers to work together on long term sustainable funding options.▪ Allows for more robust contracting processes that are available through conditional grant making processes.▪ Given the longer term and higher value, the council has the ability to allow for more robust planning, monitoring, and evaluation activities under the agreement.	<ul style="list-style-type: none">▪ Provides an incentive for communities to come together and commit to the planning process if they know that they will be financially supported by ORC to implement the plan.▪ It allows for greater opportunities to plan and evaluate the projects/initiatives delivered and inform future decision making through data and evidence gained through the development of intervention logic (conducted during the development of the CAP).▪ Provides a framework and funding to directly support communities to implement the CAPs that currently does not exist (linked to incentivisation).▪ Can remove some of the confusion around 'large scale' funding and the decisions around its purpose and process of allocation.▪ Can enhance on the ground collaboration and coordination by actively bringing together mana whenua, community stakeholders and ORC.▪ Can cement ORCs leadership role in the sector by demonstrating an ongoing commitment to support both CAP and implementation in communities.	<ul style="list-style-type: none">▪ May open doors to additional leveraging and co-investment, or philanthropic investment opportunities if the fund is operated outside of the ORC structure and political process.▪ Could allow for funds to be pooled across different organisations that can then be allocated and administered independently so not to favour one organisation or funder over another, contributing to more equitable funding decisions.▪ Provides opportunities for the fund holder to benefit from charitable tax exemptions which could positively affect the overall value of the funds available to grant/allocate.	<ul style="list-style-type: none">▪ Potential to solidify a formal partnership with mana whenua and path to co-investment with mana whenua.▪ Potential to solidify a path to formal partnership with a philanthropic entity and a path to co-investment with a philanthropic investor.▪ Has the ability to reduce duplication in grant making and procurement activities in this area, as well as streamlining the application and accountability processes for community groups and providers.▪ Has the potential to increase trust between partners – at all levels within the system.▪ May provide ORC with opportunities to access systems and processes that are not currently available to the organisation, that may arise as a result of a collaborative arrangement. For example, access to sophisticated grant/funding allocation and accountability technology or frameworks a partner may have access to.	<ul style="list-style-type: none">▪ If additional funding is leveraged, it can increase the overall pot of funding available to invest in environmental initiatives.▪ It could lead to the creation of innovative funding and partnership arrangements, led by ORC.▪ Could achieve regional spread and landscape scale environmental outcomes if the scale of leveraged investment allows (for example, additional funding secured from a funder that has cross-regional coverage).▪ Can lead to greater community empowerment as a Trust model allows for communities to have a closer involvement in decision making.▪ The entity can access additional revenue from a wider source of funding options than would be available to Council – such as receiving bequests, donations and grants from individuals or other Trusts and philanthropic investors. It may also create opportunities for alignment to the tourism and commercial sectors.

	7.4.1 Large-Scale Contestable/Grant Making Fund	7.4.2 Structured Purchasing Approach – Registration of Interest (ROI) and Request for Proposal (RFP)	7.4.3 Funding via the Integrated Catchment Management Programme or by Catchment Action Plan	7.4.4 Devolving ‘Large-Scale’ Funding to a Third Party to Administer & Grow	7.4.5 Joint Venture – Collaborative or Co-Funded Arrangement	7.4.6 Establish a Council Controlled Organisation (CCO)
Weaknesses	<ul style="list-style-type: none">Allocating large-scale funding under existing structures does not ensure that investment is made into the right places, projects and initiatives at the right time.A highly competitive process reduces the ability for Council to work in collaboration with stakeholders and communities to understand where and how investment should be made.A highly competitive process reduces opportunities for collaboration between communities and providers.It is unlikely that the internal resources currently managing the ECO Fund process will have the capacity to stand up and administer a new funding stream of this scale without additional support.This model limits the opportunity for collaborative co-funding discussions with other funders or potential partners.If detailed guidance was not provided around suitable criteria and scale of investment, ORC may make investment decisions based on good ideas rather than science and evidence.	<ul style="list-style-type: none">This model will require substantial upfront internal capacity and capability to get the process established. Planning and undertaking a comprehensive procurement process can take significant time and resources to execute effectively.The criteria could be too narrow to attract a good range of respondents to the procurement.Depending on the agreed criteria, there may be a limited number of community organisations with the capacity and capability to deliver the requirements, or those with capacity and capability may be confined to one geographic area of the region.	<ul style="list-style-type: none">Investment decisions will be driven to those communities ‘ready’ and ‘willing’ to develop a CAP with catchments with high environmental needs or priorities missing out or being deprioritised if there is not an achieve CAP process in place.Currently there is not the appetite or resourcing to expedite the development of CAPs across all catchment areas simultaneously. This means that the funding may incentivise communities to develop a plan, but ORC will not be able to effectively meet demand for this within the current ICM approach.The value of the funding available and the level of investment that can be made will dilute over time. For example, Catlins as the only approved plan, could seek the full amount of the funding available in the ‘large-scale’ fund, but competition for the available funding would increase significantly with more CAPs being implemented.In some catchment areas, suitable governance and management structures may not be in place to hold/spend/allocate ORC funds to support CAP implementation. This is especially true where delivery against the plan needs to be completed by a third party (such as a contractor). These community groups may not have the capacity and capability to manage ratepaying funding in this manner.Capable and reliable community organisations may not have the opportunity to deliver projects or initiatives of ‘large-scale’ if funds are only able to be allocated to community organisations working in areas that have an approved CAP in place. This may lead to lost opportunities as a response to ‘waiting’.	<ul style="list-style-type: none">A portion of the ORC investment will need to be retained by the entity as an administration or overhead fee, or this fee will need to be covered from additional ORC funds.Investment decisions are made by people removed from day-to-day delivery who may hold important contextual information and existing relationships.It is not currently known if there are any suitable entities in the region who have the desire, capacity or capability to partner with ORC to implement this model in the short term.Port Otago, as an existing CCTO, is not set up to undertake charitable activities, and this fund does not align with their priorities outlined in their Statement of Intent. Therefore, ORC may need to seek an arrangement with an entity that is completely outside of the local government legislative and regulatory framework.The model will still require significant ORC oversight and management to ensure delivery against KPIs and contract is being achieved.May take some time to stand up and be fully operational, and the ability of this arrangement to leverage additional funding will likely take significant time to achieve.	<ul style="list-style-type: none">It may be challenging to align the environmental and investment priorities of partners under a joint arrangement, particularly given regional variance.It is unlikely that other potential partners will have the scale of responsibility and investment available that matches ORC – creating an imbalance of power and potential risks to collaborative decision making.Achieving alignment of funding priorities across multiple mandated geographical boundaries can be difficult.ORC cannot implement this model alone, and regardless of the readiness and desire of ORC to progress this, implementation will require the existence of at least one other partner who is at the same state of maturity or readiness to also commit/come together/ co-invest.	<ul style="list-style-type: none">It will take considerable time and resources to establish and to be fully operational.Will require separate policies to outline the governance, management and accountability requirements of the entity to ORC.The new entity will require funding to administer and run its operations, including remuneration of directors/trustees and it may not be cost-effective to do so.There will be additional workload and expectations placed on existing Councillors and/or ORC staff to ensure the new entity has effective representation.Investment decisions could become more closely linked to community expectations rather than council priorities or strategy.This can lead to reduced direct accountability to ratepayers for the funding and allocation decisions made by the Trust/entity.The Trust will incur additional ongoing costs to manage and monitor the performance of the entity that can diminish the value of the investment that can be made directly into communities.
Risks	<ul style="list-style-type: none">This model perpetuates the cycle of highly competitive funding.The short-term nature of the current ECO Fund model reinforces short term funding arrangements which do not support staff continuity and financial sustainability for community organisations.It is likely to discourage collaboration between providers/suppliers which may impact on the level of biodiversity outcomes that can be achieved.May inadvertently fuel a culture of funding ‘new’ projects rather than maintaining existing initiatives (particularly if the current ECO Fund criteria were used to make funding decisions).May create duplication or enhance gaps in areas in priority areas have been identified through other processes such as the Integrated Catchment Management programme.	<ul style="list-style-type: none">There may be limited capability of some providers to respond to a formal procurement process such as this which may impact on their willingness to respond. This may place further pressure on small numbers of staff or volunteers within these organisations.This process may impact on existing relationships between community organisations, the ORC if those organisations feel they are being excluded from a process if they do not meet the criteria set out in either the ECO Fund or the ‘large-scale’ fund. They may not feel that their work is valued by the council.Provider capability may be stronger in one catchment or geographical area, leading to the perception that only one part of ORC area is receiving funding or that funding is not distributed equitably.	<ul style="list-style-type: none">ORC’s ability to adhere to procurement best practice, accountability and transparency requirements may be limited if funding is not able to be allocated to an experienced community organisation or legal entity to oversee CAP implementation.If entities leading the implementation process are required to allocate grants and small-scale funding to other groups within the community to deliver against the plan, this could create significant inefficiencies by recreating multiple allocation and accountability structures at catchment levels.If CAP implementation is not effectively coordinated and managed to achieve landscape scale impact, the intent and purpose of ‘large-scale’ funding could be lost, giving rise to ad hoc delivery of a variety of projects that are uncoordinated and unconnected.Community enthusiasm and engagement (and access to suitable volunteers to drive implementation) may wane over time. It is important to note that this could occur regardless.The impact of the investment and outcomes that can be achieved in each community may wane over time as more CAPs are developed and funding is diluted.Work needs to be done to support communities to identify and secure sustainable funding streams to support ongoing delivery (if ORC does not intend on being the sole, long-term funding partner to the CAP implementation process).Groups and communities may struggle to leverage additional investment or resources if they are a newly established group (established in response to there being no suitable legal entity for ORC to invest in) and do not have a strong track record of delivery).	<ul style="list-style-type: none">Transparency of the use of ratepayer funds is reduced by devolution to an entity outside of ORC.The entity contracted could be too far removed from the day-to-day work happening in the region, particularly if their core business is not supporting environmental initiatives or investment.The ORC may not be able to find a suitable entity to contract to administer funding on their behalf, or those with suitable capacity and capability may not have a regional mandate across the region (and therefore not know the communities or understand their issues).There is a reputational risk to ORC if the contracted entity does not effectively deliver what was intended, or there is a misalignment in values between the entities, or communities do not feel implementation has been fair, equitable or transparent.	<ul style="list-style-type: none">The political and media environment may identify any negative situation that arises from a joint arrangement as a ‘failure’ or ‘waste’ which may cause reputational damage for all parties.The internal cost to establish a collaborative or joint arrangement can be high, including time of internal staff resources to identify, negotiate, and manage joint arrangements, as well as legal costs.There may be disruptions to the existing arrangements or funding allocations while ORC transitioned to a new joint arrangement.The value proposition and benefit of a joint arrangement may not be strong enough for ORC to attract potential partners.The partnership and collaborations need to be already working in practice before becoming formalised – forced partnerships are rarely effective.It may be difficult to identify and implement an equitable joint arrangement, if, in a co-funding arrangement, all partners are not able to equally contribute. This may create challenges with perceived power imbalances or imbalanced distribution of funds.	<ul style="list-style-type: none">Until such time as additional investment is leveraged to support initial ORC investment, the model can be seen as costly, with little direct benefit to ratepayers.ORC policy and environment expertise and knowledge becomes removed from the decision making and grant allocation processes.Investment decisions can lose alignment with strategy and ORC priorities.There is a reduced ability for Council to manage risk – arm’s length delivery can make managing reputational risk more challengingIf ORC seeks to appoint Councillors as directors, this raises a concern in relation to management of conflicts of interest and potential double payment to elected members for undertaking a role they were already undertaking before the entity was established.

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Financial Implications	<ul style="list-style-type: none">Can risk investing in the providers/ organisation's that are able to or have the resources to write the best funding applications.Investment may not be targeted towards the highest priorities or the best environmental outcomes.Depending on the value of funds available and funding rounds held, it could create financial inefficiencies given the resource intensive nature of administering funding rounds and then managing and monitoring delivery – contestable funds are expensive to administer.Depending on the length of investment, short-term investments are less likely to be able to demonstrate value for money or positive environmental impact.	<ul style="list-style-type: none">Risk investing in the providers that are best placed, or with the resources to write the best funding applications.This can be mitigated by a pre-procurement screening process, but this may result in investment in only one or two catchment areas.Investment may not be targeted at the highest priorities or the best environmental outcomes.It will likely require an up-front commitment and commitment to invest the full value of approved funding in one procurement round (rather than by annual or one-off grants). There are both efficiencies and risks in this approach.May place procurement requirements onto community organisations that they are not familiar with or adept at managing. This may require ORC to invest in time and resource to ensure organisations are supported through the process.The length of investment needs to be long enough for there to be mutual benefit to both ORC and communities. If a multi-year term is not agreed, this will be an inefficient model operationally and financially for both council and community organisations.	<ul style="list-style-type: none">Sustainability of the funding – the impact and value will become diluted over time as more CAPs develop and the implementation requirements will be ongoing.Potentially sets the precedent and expectations within communities that ORC is the sole funder of CAP implementation.Risk that some communities will not have the opportunity to access funding, regardless of need, if there is no CAP in progress or in place.May require significant internal resourcing and support to establish and support community ‘readiness’ for CAP implementation. This is currently being managed internally within existing resources to support the Catlins, but it is not likely sustainable once the process is in varying stages of development across the region.Should MfE funding to support the CAP process cease, ORC will need to source this funding from other internal budgets, or source from outside the organisation.The internal capability and capacity required to shift from CAP development to funding implementation may be different to what is in place.Community readiness may drive funding prioritisation and allocation decisions that may create inequities across the region. That is, community readiness may direct funding decisions rather than environmental need.	<ul style="list-style-type: none">The funding available for investment will be diluted (circa 10% p/a) to cover the administration costs met by the contracted entity.The ability (and/or appetite) of an outside entity to raise additional funds/investment on behalf of ORC may be limited.The Council may not achieve value for money if the entity is not capable of effective delivery.May create duplication or gaps in the transfer of information, data, and grant information between organisations.Duplicate funding allocation decisions may be made without insight into who each entity is allocating funding to (noting that ORC has funding streams outside of the large-scale fund).To be cost efficient, all grant making and funding activities undertaken by ORC could be transferred to an outside entity, but this could attract larger overhead costs and increased probity concerns relating to the use of ratepayer funds.	<ul style="list-style-type: none">It may be difficult to obtain equality in investment across partners able/willing to collaborate. This can create challenges and tensions in achieving equity in funding allocation and investment decisions (e.g. those with more money wanting to have more power in decision making).The collaborative partnership will need to clearly determine and agree the scope of the partnership – whether that is to work together for better environmental outcomes, or whether they will contribute joint funding to support grant funding or investment into community initiatives.The administration costs (both internally to ORC and of the collaborative arrangement) may outweigh the direct financial benefit of the arrangement – that is, it may not be cost efficient or effective to have the arrangement in place.The financial sustainability of the arrangement needs to be considered, especially if the collaborative arrangement is with an entity outside local government, due to differences in their planning and budgeting cycles. This can be equally challenging within the council structures as commitments are only likely to be made for one three-year LTP budget cycle (and then revisited annually as part of the Annual Plan process).	<ul style="list-style-type: none">There will be an ongoing annual cost to manage and administer the entity as it will require its own financial accounts, staff to administer the activities of the entity and possible remuneration of Trustees/Directors.The charitable incentives that could be achieved through this model may not out way the costs, especially considering possible proposed tax changes for charitable entities.ORC needs to determine the long-term sustainability of the Trust in the long term and whether leveraged investment is likely, or whether the interest earned off the initial endowment is sufficient to sustain investment in large-scale environmental initiatives in the long-term.The model may not present value for money without committed co-investment or funding.
Operational Implications	<ul style="list-style-type: none">Contestable funds are incredibly time and resource intensive to effectively manage and monitor and it's unlikely that this process could be managed within existing resources.ORC will need to develop and implement a clear communications strategy to articulate how this funding would be different to the existing ECO Fund which may create confusion in communities – requiring greater internal resource to communicate.Consideration of the timing of this Fund will be important to ensure the workload for community organisations and ORC is balanced. The addition of extra ECO Fund application and allocation rounds will have significant operational implications, particularly if the Fund is open to anyone to apply.The current ECO Fund reporting and performance monitoring is likely to be insufficient for larger-scale levels of investment and a new criterion to account for this would need to be considered and developed.This model does not easily allow for sector wide or cross-Council collaboration due to the competitive nature of the application and review process.	<ul style="list-style-type: none">While the procurement process may be less intensive due to a reduced number of applications, the ongoing management and monitoring of contracts/programmes will be more resource intensive than the grant process, requiring a more specialised procurement skill set than may already be in place to effectively administer, manage, and monitor these agreements.The strength of this model will be reliant on the procurement parameters and timings put in place to give ORC time to implement this model effectively, as well as giving respondents suitable time to submit a proposal in response to the Council requirements.	<ul style="list-style-type: none">An increase in internal resourcing, capacity (and potentially different capability) will likely be required as the need to support and invest in implementation activities ramps up.Resources may become spread too thin on the ground over time.Duplication and inefficiencies may occur if projects and initiatives are developed and invested in on a CAP-by-CAP basis rather than looking at opportunities for a region wide approach to meeting outcomes or addressing issues.	<ul style="list-style-type: none">The model will take time to set up and establish, especially if there is no entity willing and able to take this role on. ORC will need to establish trusting relationships prior to entering a formal contracting arrangement.It is unlikely that one single entity exists that could take on this role and that also has full regional reach and coverage that aligns with ORC boundaries. This may mean multiple agreements could be required to achieve coverage, which would create a range of risks and financial considerations.Administering this arrangement would still require a significant level of internal capacity and capability to ensure the fund was effectively being administered and aligned to ORC strategy and priorities.The ability of the contracted entity to make sound and effective funding decisions may be at risk if the scope or scale of this fund is outside of their core business, or area of expertise.	<ul style="list-style-type: none">The planning cycle and process for operational decision making may not align across ORC and others in a collective arrangement, especially those entities or funders outside of local government.Long-term trusting relationships and partnerships take time to evolve and develop and required commitment and leadership from senior levels within the organisation.It will likely take time, effort, and resource, to find the right partnership opportunities and alignment to suitable partners where there is alignment in strategic and operational aspirations, and geographical reach and coverage.Working to develop and confirm an arrangement such as this in place will take considerable internal leadership capacity and capability to drive this forward – this type of collaboration does not happen by chance and will require intentional commitment and dedication to move forward.Future-proofing the arrangement can be challenging if leadership or priorities of partners and/or co-funders changes, even if ORC's commitment doesn't wane. This can impact long-term funding relationships and credibility with communities and the environment sector.	<ul style="list-style-type: none">The model will take considerable time, cost and resources to establish and to become operational.Will require internal support to establish a legal structure, board and to establish and employ staff to manage the ongoing operations of the entity plus any contracting or funding arrangements between ORC and the entity.Will need dedicated resource to attract and confirm co-funding or co-investment arrangements.Council needs to consider whether this model is the best mechanism to achieve the Councils objectives.The model will need to prove it can provide value for money and increase efficiency over other models.ORC will need to determine whether it has ongoing capacity and capability to oversee the entity as ongoing oversight will include requirements to:Appoint/reappoint Directors or TrusteesManage an effective relationship between Council and the entitySet up and ongoing adherence to an appropriate monitoring frameworkEngaging with accountability and reporting documents prepared by the entity andMeeting the ORCs own accountability and reporting requirements under the LGA (2002).ORC will need to ensure that the LGA (2002) requirements of a CCO/Trust are met including the preparation and auditing of separate financial accounts, as well as branding, marketing etc.