WORKSHOP

OF THE

Clutha District Council

Thursday 17 September 2026

Commencing at 08:45 am

At the Council Chambers

1 Rosebank Terrace

BALCLUTHA

Workshop Agenda

Thursday 17 Sep 2026
8.45 to 12.20 pm
Council Chambers
1 Rosebank Terrace
Balclutha

WORKSHOP TITLE:	**Long Term Plan 2027/37**
WORKSHOP PRE-READING	**1. Pre-reading as noted below.** **2. A PowerPoint presentation will be used to facilitate workshop sessions, a hardcopy of which will be provided at commencement.**

Workshop Programme

Time (Indicative)	Session	Topic	Outline	Pre-reading page ref.
8.45 am		**Preliminaries**	Opening statement, apologies, conflict of interest.	
8.50 am	**1**	**Government Reform**	Update	3
9:00 am	**2**	**Overhead Model Review**	Continuation of Workshop Session 10 September 2026.	4
9:30 am	**3**	**LTP Assumptions**	Initial draft assumptions for LTP.	18
10:00 am	**4**	**Open Spaces AMP**	Final Open Spaces AMP including insurance, depreciation and operational budget.	43
10:40 am		**MORNING TEA**		
10:55 am	**5**	**Community-owned facilities funding model, and key policy elements**	Model and key policy elements	49
11:40 am	**6**	**LTP Residents Consultation**	Consultation and engagement approach.	141
12:20 pm		**CLOSE**		

Council workshops are intended to provide a forum for Councillors to be briefed, explore issues and to guide Council staff on further consideration of issues or the development of options, or ask staff to bring forward issues for formal consideration at a Council meeting. Workshops cannot make decisions that bind Council or its staff

Long Term Plan 2027/37

Workshop Topic	Government Reforms Update
Workshop Date	17 September 2026
Session Number	1
Author	Peter Stafford – Strategic Planning and Policy Manager
M-Files Ref	1057159

SUMMARY

This session will provide a brief verbal update on the Government's legislative reforms.

PROPOSED WORKSHOP OUTCOMES/DIRECTIONS

1. **Council consider/discusses and provides direction Government's legislative reforms program.**

REPORT

This session will be supported by a MS PowerPoint presentation.

Further consideration of proposed assumptions associated with Government reforms are considered the next workshop session 2.

Long Term Plan 2027/37 Workshop

Workshop Topic	Overheads Model – Continuation 10 September 2026 Session
Workshop Date	17 September 2026
Session Number	2
Author	Sharon Jenkinson – Finance and Policy GM
M-Files Ref	1057656

SUMMARY

This is a continuation of the overheads model session from the 10 September 2026 workshop.

The purpose is to provide direction on principles for review taking into account the previous presentation and matters discussed on 10 September 2026.

PROPOSED WORKSHOP OUTCOMES/DIRECTIONS

1. **Council provides direction on principles for review**

ATTACHMENTS

A: PowerPoint Presentation from 10 September 2026 Workshop Session.

PowerPoint from Council Workshop 10 September 2026

Session 2
Long Term Plan 2027/37

Overhead Model Review
Sharon Jenkinson

Overhead Allocation Review

As part of CDC's current LTP work the overhead model is being reviewed following recent restructures and the imminent transfer of Three Waters activities to a CCO. Discussions to date have included reviewing NZTA claimable administration costs, and scheduling a dedicated overhead model workshop.

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- An overhead is a cost that supports an organisation's operations but cannot be directly attributed to a specific service, project, or activity. It is an indirect cost of running the organisation
- Our overheads are made up of layers.
- The first layer is our corporate overheads ($9,427,610)
- The second layer is the overheads that are directly attributed to an activity ($4,587,717)
- Total Overheads currently in this estimate to be allocated equal $14,015,317.

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- Corporate Overheads are defined as those that benefit the whole Organisation and include.

Draft Estimated Costs	2027/28
The Rosebank Office	321,700
Chief Executive Department	765,647
Commuinication	332,091
Finance	3,515,751
Geographical Information Systems	179,120
Health & Safety	327,008
Human Resources	579,355
Information Services	2,727,488
Policy	488,721
Records Management	190,729
Total Corporate Overheads	9,427,610

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- The second layer is the overheads that are directly attributed to an activity.

Draft Estimated Costs	2027/28
Infrastructure Operations	1,886,761
Infrastructure Strategy & Delivery	1,184,147
Community Services	887,168
Building & Regulatory	334,577
Planning & Regulatory	295,064
Total Activity Specific Overheads	4,587,717

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Our Current Overhead Method:

Currently overheads are allocated to end users based on a historic model that is calculated using a mix of operational costs and staff numbers. The end users of the above overheads using the current model are

End users of current model			
Civic	854,141	Transportation (Assisted Roading)	3,907,955
Community Libraries - Balclutha	364,849	Community Services (Further Allocated)	662,586
Community Libraries - Lawrence	72,593	Greenspace(Parks)	432,507
Community Libraries - Milton	103,704	Swimming pools	530,096
Community Libraries - Owaka	49,024	Waste	908,091
Community Libraries - Tapanui	80,135	Water	3,541,084
Community Support & Develop	51,852	Building	885,744
Cribs, endowment Land,Other	65,051	Civil Def	12,302
Culture & Heritage	62,222	Dog Control	233,738
Economic Development	99,933	Environment	61,510
I-site - Balclutha	97,104	Liquor	36,906
L/Tuapeka CB	63,165	Compliance	145,935
West Otago CB	63,165	Resource Management	583,742
West Otago Health	46,195		
Total Estimated Overheads allocated			14,015,327

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Option 1: Full Allocation Recalculation

Recalculate the allocation of all costs to operational activities using cost drivers (as above, but updated). Cost drivers could include:

- Operating Expenditure
- FTE's
- Number of Staff
- Devices
- Activity Expenditure

These costs would then be split across end users (as above)

Option 1: Full Allocation Recalculation

Advantages include:

- Provides the most complete picture of the true cost of each activity.
- Strong alignment with beneficiary-pays and user-pays principles.
- Supports robust fee setting and cost recovery.
- Minimises reliance on General Rates.

Disadvantages include:

- Complexity
- Can be difficult to explain and maintain.
- Requires complex allocation drivers and regular review.
- May significantly increase consent fees, waste charges and targeted rates.
- Community activities can become burdened with overheads they have little ability to recover.

Option 2: All Corporate Activities Rated

- Fund all Corporate Activities directly from a General Rate, UAGC, or a mix.
- Operational activities only recover costs directly incurred from Infrastructure Operations, Infrastructure Strategy & Delivery, Community Services, Building & Regulatory & Planning & Regulatory. This can be done using any of the proposed allocators in option 1. All Corporate overheads are funded via a rate.

Option 2: All Corporate Activities Rated

Advantages include:

- Very simple to administer and explain.
- Stable funding source.
- Keeps fees and charges lower.
- Recognises that corporate functions support all activities and the wider community.

Disadvantages include:

- Weak connection between beneficiaries and costs.
- General ratepayers subsidise activities with identifiable users.
- Reduces transparency of the true cost of services.
- May be inconsistent with cost recovery objectives for regulatory and waste activities.
- Limits recovery of overhead costs through subsidised activities such as roading.

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Option 3: Proportional Allocation to Income Generating Activities

Under this model, all corporate functions contribute to an overhead pool, but only a proportion is allocated to activities with a strong beneficiary-pays or user-pays basis (Roading, Waste, and Planning & Regulatory). The remaining corporate costs are funded through a rate.

Income generating end users would include

- Transportation
- Waste
- Regulatory Services

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Option 3: Proportional Allocation to Income Generating Activities

The proportion to be allocated could be based on:

- Operating expenditure as a proportion of total Council operational expenditure (likely Waste)
- Number of staff as a proportion of total Council staff (likely Regulatory)
- Match the NZTA Admin fee (Transportation)

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Option 3: Proportional Allocation to Income Generating Activities

Illustrative Example – Total cost $9.4M, $2.7M allocated, the balance $6.7M rated

Draft Estimated Costs	2027/28	% Allocated	$$ Allocated
The Rosebank Office	321,700	25%	80,425
Chief Executive Department	765,647	25%	191,412
Commuinication	332,091	25%	83,023
Finance	3,515,751	35%	1,230,513
Geographical Information Systems	179,120	25%	44,780
Health & Safety	327,008	25%	81,752
Human Resources	579,355	25%	144,839
Information Services	2,727,488	25%	681,872
Policy	488,721	25%	122,180
Records Management	190,729	25%	47,682
Total Corporate Overheads	9,427,610		2,708,478

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Option 3: Proportional Allocation to Income Generating Activities

Advantages include:

- Balanced approach between full overhead allocation and full general rate funding.
- Recognises that Roading, Waste, and Regulatory directly benefit from corporate support functions.
- Supports user-pays and beneficiary-pays principles in the Revenue and Financing Policy.
- Potentially increases the proportion of roading costs eligible for NZTA funding assistance.
- Easier to implement and explain than a complex, fully allocated overhead model.

Option 3: Proportional Allocation to Income Generating Activities

Disadvantages include:

- The percentage allocated remains subjective and may be challenged.
- Fees may need to increase to recover the additional costs.
- May not fully reflect actual usage of corporate services by individual activities.
- Creates ongoing debate over which corporate functions should be allocated and at what proportion.
- This option provides a pragmatic middle ground. It acknowledges that corporate functions support the entire organisation while ensuring that activities with clear users, beneficiaries, or external funding sources contribute to the costs of that support.

Overall Assessment

The partial allocation model is likely the most balanced option following the water services transition. It:

- Retains a meaningful beneficiary-pays component for Roading, Waste and Regulatory activities.
- Limits undue pressure on fees and charges.
- Recognises that corporate functions such as Policy, Governance, CE leadership and organisational management provide district-wide benefits and are therefore appropriately funded through General Rates.
- Is simpler and more transparent than a full allocation model while providing better cost attribution than a full general-rate approach.

Overall Assessment

In summary:

- Full overhead allocation = strongest cost attribution, most complexity.
- Partial overhead allocation = balanced middle ground.
- Full general rate = simplest approach, but weakest link between beneficiaries and costs.

Possible Funding Mechanisms

If Council funds all or a portion of corporate overheads through rates rather than activity charges, there are several rating mechanisms available. Each has different implications for equity, simplicity, and transparency.

- General Rate
- UAGC
- Combination
- Corporate Services Targeted Rate

Option 1: General Rate (Most Simple)

Fund the rated portion through a General Rate based on capital value.

Advantages

- Simple and easy to administer.
- Spreads costs across the entire district.
- Recognises that corporate services benefit all Council activities.
- No additional rating mechanisms required.

Disadvantages

- Weak beneficiary-pays connection.
- High-value properties pay more regardless of service use.
- Business or commercial activities may contribute less than the benefit received.

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Option 2: Uniform Annual General Charge (UAGC)

Fund the rated portion through a fixed charge per rating unit.

Advantages

- Every ratepayer contributes equally.
- Easy to understand and explain.
- Reduces volatility between property values.

Disadvantages

- Can have affordability impacts on lower-value properties.
- Often viewed as less equitable because all properties pay the same amount.

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Option 3: Split Funding Between General Rate and UAGC

For example:

- 70% funded from General Rate
- 30% funded from UAGC

Advantages

- Mixes ability-to-pay and equal-benefit principles.
- Provides a balance between property value and flat charges.
- Common approach for district-wide functions.

Disadvantages

- Somewhat more complex.
- Debate over the appropriate split.

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Option 4: Corporate Services Targeted Rate

Create a specific targeted rate for corporate activities.

Advantages

- Shows ratepayers exactly what corporate support costs.
- Allows Council to review funding levels independently.

Disadvantages

- Additional rating complexity.
- May be perceived as introducing "another rate."

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What is the best fit for CDC?

As Corporate services contain both operational, organisational and community benefits it is considered that a hybrid model may be easiest to justify.

Under this model, a proportion of corporate overhead costs would be allocated to Roading, Waste and Regulatory activities where there are identifiable users or external funding sources. The remaining district-wide benefit component would be funded through the existing UAGC and/or a General Rate, recognising that all properties benefit from effective corporate leadership, governance, planning and organisational support.

This approach provides a reasonable balance between user pays, ability to pay, and administrative simplicity.

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Existing UAGC Considerations

Should Council wish to pursue a model which includes rate funding of any current overhead activities, they may also wish to consider combining the existing UAGC funded activities with any residual rateable corporate overheads into a single District-wide funding pool.

Advantages

- Simpler funding structure
- Stronger narrative around services benefiting the entire district
- Alignment with Revenue & Financing principles (user pays & district-wide benefit)
- Avoids debate over who should pay

Disadvantages

- Larger UAGC pool – consideration needs to be given to mechanism, ie UAGC% and/or general rate %.

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Existing UAGC Considerations

This District-Wide Services Pool could then be funded using any of the methods mentioned above.

Using the existing UAGC plus a General Rate, creates a much cleaner and more defensible funding model than treating corporate overheads as a stand-alone activity. This may also fit well with discussions around moving from a detailed overhead allocation toward a simpler, more transparent funding approach following the water services transition.

This would reflect that:

- Every property receives a basic benefit from corporate leadership and governance (UAGC rationale).
- Higher value properties arguably derive a greater benefit from a well-functioning district and have greater capacity to contribute (General Rate rationale).

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Council Direction:

- Council to provide direction on overhead modelling and any potential associated rating impacts.

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Long Term Plan 2027/37

Workshop Topic	LTP Assumptions
Workshop Date	17 September 2026
Session Number	3
Author	Peter Stafford – Strategic Planning and Policy Manager
M-Files Ref	1057161

SUMMARY

This session will provide an initial overview of LTP assumptions to be used in the LTP.

It should be noted the assumptions to be discussed will be further developed/updated in response to new information and developments that can be expected to occur during the formulation of the LTP.

PROPOSED WORKSHOP OUTCOMES/DIRECTIONS

1. **Council consider and provides direction Government Reform Assumptions drawing on Reform Assumptions for the 2027/37 Long Term Plans (Attachment A)**

2. **Council consider and provides direction on CDC Long Term Plan 2027/37 Assumptions (Attachment B)**

REPORT

Assumptions provide the foundation for the Long Term Plan by documenting the key factors, expectations, and uncertainties that underpin Council's decisions, financial forecasts, levels of service, and investment programmes.

By identifying significant assumptions, Council demonstrates prudent planning, supports informed decision-making, and promotes transparency and accountability to the community.

Assumptions also help assess risk by highlighting where actual outcomes may differ from expectations, enabling elected members, auditors, and the public to understand the potential timing, impacts, and financial implications of major reforms and external changes, and to monitor and respond to those changes over the life of the Plan.

Government Reform Assumptions

The Reform Assumptions for the 2027/37 Long Term Plans (Attachment A) is a summary of the progress of the key reform processes and explains how these translate to LTP assumptions

The information was correct as of 14 August 2026 noting there are number of developments which will result in an expected update at the end of September 2027. Please note the Taituara disclaimer at Attachment A, page 2.

Specific matters being updated will capture developments on rate capping, last stages of the RM and emergency management legislation, and possibly the final enactment of the systems improvement bill. Recent communications from Taituara provided the following I interim updates on the attachment..

Financial forecasts should be developed on the assumption that council continues to deliver services in order for the LTP to give any decision-maker and the community up to date information on levels of service, programmes of work and the financial impact of these.

Head Start proposals are an important context to the LTP. Taituara is in discussion with the Audit Office centres around how far disclosure of these proposals should go. Subject to that advice it might be expected that LTP should mention whether the council is part of a live proposal, what is involved, where the process sits and when other decisions are being made, as well as noting that financials have been prepared as per above. Also, if named in more than one proposal then both should be disclosed. If a council is not named in a proposal, then it should be stating the key aspects of what is known of the back stop process and what that may mean.

CDC Long Term Plan Assumptions Database

The CDC LTP 2027/37 Assumptions Database (Attachment B) lists key assumptions, significant forecasting assumptions, general assumptions, financial assumptions, and activity-specific planning assumptions used to develop Council's Long Term Plan. It is based on LTP 2024/24 assumptions with initial updates LTP 2027/27 assumptions.

These assumptions cover areas such as residents, age demographics, visitor and housing growth, rating base changes, climate change, natural disasters, legislative reform, levels of service, asset management, capital projects, borrowing, funding, and Council activities.

For each assumption, the database identifies the likelihood and consequence of change, the resulting level of uncertainty (risk), and the reason for uncertainty.

Attachment B will be also updated/aligned with information provided by Taituara.

ATTACHMENTS

A: Reform Assumptions for the 2027/37 Long Term Plans (Taituara Aug 2026)
B: CDC Long Term Plan 2027/37 Assumptions Database

Taituarā
Local Government Professionals Aotearoa

Reform Assumptions for the 2027/37 Long-term Plans

August 2026

Disclaimer:

Taituarā has prepared this document for the New Zealand local government sector.

This document is based on the best available information on the status of various items of legislation and policy in progress at the time of writing (10 August 2026).

Some of the reforms will require substantial policy development and review within individual regions. Local authorities should carefully consider what progress they expect to make with each of these and by when.

Therefore the document is not a substitute for appropriate legal and policy advice tailored to the circumstances of your local authority.

Every effort has been made to ensure the contents of the document are accurate including an audit review. Neither Taituarā nor the individuals involved in the preparation of this document accepts any liability for loss or damage arising from the use of material contained herein. Reading beyond this point constitutes acceptance of the terms of this disclaimer.

What is this guidance note?

Local authorities are required to prepare their long-term plans using the best available information and assumptions at the time that plan is prepared.

This guidance note sets out general guidance on each of the legislative and policy reforms in progress. We say general, because there are aspects of local decision-making ingrained into several of these reforms.

For example, local authorities had the choice of two delivery options for their water services, the exact choice and date of establishment for any transfers outside council are policy decisions for each local authority to make.

Local Water Done Well / Water Service Reforms

By 30 June 2026, every local authority that provides water services will have adopted a service delivery plan and have had them approved by the Secretary for Local Government. The selected service delivery options and investment programmes should form the basis for development of LTP, including any assumptions about the timing and nature of regulatory change.

Those local authorities that have formed an in-house business unit should note the requirement to prepare a further water services delivery plan by September 2030 (five years after the first) and allow for budget to prepare such a plan (including engagement).

With limited exceptions, detailed information about individual groups of water services must be included in your local authority's water services strategy and may not be included in the LTP. This applies both to those services delivered by water organisations and those delivered by in-house business units.

Rate capping

We expect legislation in August 2026, for enactment in early/mid 2027. The cap will take effect on and from 1 July 2029, though the Ministry of Cities, the Environment, Regions and Transport (MCERT) will monitor levels of rates increase in the interim.

At time of writing there was no additional information on the underpinning policy over that released at the time of the announcements in December 2025.

The cap will be set and enforced by an independent regulator – most likely the Commerce Commission. The December 2025 announcements refer to an indicative range of between 2 and 4 percent in any given year.

We understand that MCERT will commission an external forecast of the cap for use in the long-term plans.

The actual cap in any year would be determined by application of a formula set in statute. A cap for any given year could sit outside that range if, for example, some external shock led to a 'spike' in one or more of the components of the formula.

The regulator will also be responsible for considering applications from local authorities to set a rates increase that exceeds the cap. An application must be made before public consultation begins and must include a plan for returning to compliance with the cap in two years.

Targeted rates set for water and wastewater would be exempted from the cap. We understand that the Government is still considering targeted rates for stormwater will likewise be exempted. The cap applies to all other rates – though it was not clear whether rates set under the Infrastructure Funding and Financing Act and the Urban Development Act would be included or excluded.

The cap applies only to rates. Fees and charges, development contributions/levies and the like are limited only to the extent provided by other legislation or regulations (e.g. the maximum fees set under Sale and Supply of Alcohol Act continue to apply).

Although the legislation giving effect to these decisions is unlikely to be in place before adoption of LTP, there is already public expectation that local authorities will be planning as though the cap already existed. Local authorities that are considering rates increase in future years that exceed the cap should be noting that this is dependent on regulatory approval and giving some indication of a response if approval is not given.

Infrastructure Funding and Financing Reforms (Development Levies)

The Government has proposed replacing the present system of development contributions with a system of development levies. The Government consulted on these proposals in the first quarter of 2026 (calendar). At the time of writing, the Government was still considering its response to the feedback received during the consultation.

We expect that legislation will be introduced in August for enactment in early-mid 2027. A government announcement on 14 August 2026 highlighted that development levies would be available "from 2029" with no clarification of when development contributions would cease. The earlier consultation material development contributions would cease from 1 July 2030.

There is saving for financial contributions until the final turn-off of RMA – those using financial contributions should consider their transition options.

Within the above limits, how and when your local authority makes the transition from contributions (of whatever type) to development levies is a policy choice. Establishing a working policy will be time and resource-intensive, a budgetary assumption may be required.

We currently have no information about the progress made (if any) on the alternative targeted rate mechanism that was mentioned in the early publicity on these reforms

Building Act Reforms

Two separate Building Act reform streams are relevant to LTP assumptions: the Building Amendment Bill, which addresses voluntary BCA amalgamation and proportionate liability, and the Building (Earthquake-prone Buildings) Amendment Bill, which changes the earthquake-prone buildings system.

The Building Amendment Bill was introduced on 29 June 2026 and was before Parliament at the time of writing. The Bill would create a clearer legislative pathway for voluntary amalgamation of building consent authorities (BCAs) and introduce proportionate liability for claims relating to defective building project work. On current timeframes, enactment appears more likely in 2027, but that timing should be treated as an LTP planning assumption rather than a confirmed date.

BCA amalgamation would be voluntary. Local authorities should consider whether there is governing body interest in exploring a shared or amalgamated BCA model. If there is interest, they should engage early with neighbouring or partner councils to test feasibility and identify any LTP assumptions required for investigation, due diligence, governance arrangements, transition costs, ICT and process alignment, accreditation implications, and implementation timing.

The Building Amendment Bill also proposes replacing joint and several liability for defective building project work with proportionate liability. Under proportionate liability, each liable party is responsible only for the share of loss attributable to its contribution.

Proportionate liability would apply to building project work for which a building consent is issued on or after the first anniversary of Royal assent. If the Bill is enacted in early/mid 2027, this would likely take effect sometime in the 2028 calendar year.

Local authorities should consider whether the shift to proportionate liability affects their risk assumptions, insurance arrangements, legal costs, and contingent liability assumptions over the LTP period.

Earthquake-prone buildings

At the time of writing the Building (Earthquake-prone Buildings) Amendment Bill had passed its second reading and was awaiting Committee of the Whole House stage and Third Reading. The Bill provides for most changes to come into force on 1 July 2027, with some provisions commencing on the day after Royal assent.

The Bill would make the earthquake-prone buildings system more proportionate and risk-based by regulating only high-risk building types in medium and high seismic zones. Buildings in low seismic zones, including Auckland, Northland, and the Chatham Islands, and buildings outside the regulated building types, would no longer be designated earthquake-prone and could not be designated earthquake-prone in future. Coastal Otago, including Dunedin, and part of Stewart Island would be reclassified from a low seismic risk area to a medium seismic zone, reflecting updated understanding of seismic hazard in those areas.

Territorial authorities would be able to grant seismic work deadline extensions of up to 15 years, subject to the criteria and process set out in the Bill.

Local authorities should disclose the relevant assumptions and uncertainty associated with both reform streams until the legislation is enacted and commencement details are confirmed. LTP assumptions may need to cover possible BCA service delivery changes, investigation or implementation costs for amalgamation, changes to liability and insurance settings, and changes to earthquake-prone building assessment, notice, enforcement, monitoring, communication, legal support, and building control workloads.

Emergency Management

As of time of writing, the Emergency Management Bill #2 has been reported from Select Committee and was awaiting final stages of the Parliamentary process. We expect enactment in August/September 2026.

We are advised that the existing plans and committees will continue in existence until their expiration date, but the new requirements apply to appointments and plans. This means a budget assumption will be required for the reviews. NEMA has estimated that local authorities will face a cost of around $84 million to implement these reforms. A budget assumption will be needed up to the point of adoption of the first plans under the new legislation.

In addition, future LTPs will need to set out the steps the local authority will take to implement or progress requirements imposed on it by the relevant regional emergency management plan. The steps are to be determined by the local authority in a way it considers appropriate, having regard to competing demands and any other relevant circumstances. The Bill also provides that the local authority is required to implement or progress those requirements only to the extent it is reasonably able to do so.

Local Government Structural Reform

The below reflects what was made public by Ministers Bishop and Watts on 5 May. At that announcement, the Government offered local authorities the opportunity to submit proposals for reorganisation to the Government for consideration. Proposals had to be submitted by 9 August 2026, though in some cases we are aware local authorities have submitted proposals and a request for further time.

Officials will assess the proposals against the criteria listed in the announcements. Ministers will take in principle decisions before the election. One of the criteria particularly relevant to the LTP is that proposals must demonstrate that they can be delivered by the 2028 elections.

At the time of writing, it was unclear whether the approval process provides for a binary ‘approved/not approved’ or whether Ministers would be able to direct amendments and to what extent. For example, could Ministers direct that a reorganisation include a local authority or authorities not named in the original proposal? (We expect that Ministers will have a greater rather than a lower level of discretion, but this is unconfirmed)

The Government expects that proposals will adopt the unitary model of local government.

Regional councils may not submit proposals. The Government’s stated intention is that the councils will be disestablished from the 2028 elections. Communities will still need services currently delivered by regional councils, and should be planned to same standards of robustness as in previous plans,

A reorganisation proposal need not have the unanimous support of the affected local authorities. A proposal may be submitted if there is support either from a majority of councils (by number) or if those councils that have a majority of the population in the affected area support it.

It is understood that proposals that are accepted will be the subject of legislation to be introduced in the second quarter of 2027 and enacted in early 2028. That legislation will also clarify what process will be followed for those local authorities that are not part of an accepted Head Start proposal.

Those local authorities that do not submit a proposal, or where proposals are not accepted, will be advanced on a slower timeframe. No decisions have been communicated regarding a timeframe for this, other than reorganisation of this nature will not start until after the 2028 local elections. It seems unlikely that any new local authorities created through this process would come into existence much before 1 July 2030.

Our communications with the Government at political and agency level strongly suggest that an LTP is expected of all councils (regardless of whether they are in Head Start or backstop), and that this LTP will be audited. We observe that those local authorities that amalgamated to form Auckland Council in 2010, were not given any relief from requirements to prepare an LTP in 2009.

Any newly established local authority will require information about their levels of service, programmes of work and the associated financials, as well as an indication of the key issues and challenges in each of their communities. The and supporting information should be approached to the same standards of quality and robustness 'as normal'.

Local authorities that are the subject of a submitted reorganisation proposal should assume the proposal proceeds, unless and until advice is given that it won't. This will mean an early discussion with other local authorities involved in the proposal identifying, for example, what services might be delivered at the regional level (for example, catchment management).

Be prepared for a sudden 'pivot' at the point when Ministers make decisions about proposals i.e. one such potential pivot point will come in September 2026, and another in March 2027. (One may also come immediately after the election – depending on results).

Those local authorities that are not part of a proposal (whether submitted or named) should assume 'business as usual' for 2027/8 but should expect to be drawn into the process from early 2029. LTPs should disclose that fact.

The existing five unitary councils need not prepare reorganisation proposals but may choose to do so (and we understand one has submitted a proposal with a neighbouring council). It is also possible that a unitary council might be included in a proposal submitted by a territorial authority or group of territorial authorities.

The Audit Office has advised us that it is still considering whether and when a 'going concern' assumption will be needed for those councils that are part of a Head Start proposal.

Disclosure of the reforms and the local context would form a key part of the information disclosed in an LTP. That disclosure should set out the propo

Resource Management

We use the term resource management to capture: the Planning Bill, the Natural Environment Bill, and giving effect to national direction and the transitional system. Passage of both Bills is expected in September 2026 – the timetable below is developed on that assumption.

Regional Spatial Planning

A regional spatial plan must:
- map, or otherwise record, the broad spatial layout of the region over the next 30 years or longer
- identify priority locations for growth and change
- identify drivers of change over time • identify significant existing and future infrastructure
- identify significant constraints on using or developing the land or coastal marine area
- identify priority locations for climate change adaptation planning
- implement relevant national instruments under both the PB and the NEB.

All regions will be preparing a regional spatial plan at the same time, and and required to meet the same timeframes. There is no equivalent of the 'pilots' under the reforms of the last government. The "region" for the regional spatial plan is the current regional or unitary authority boundary.

Local authorities will have 21 months from enactment to publicly notify the draft regional spatial plans (i.e. a due date in June 2028). Notification starts the clock ticking on submissions and triggers referral to the Independent Hearings Panel. Local authorities will have a further nine months from notification of the draft plans to have made decisions on the recommendations from the Independent Hearings Panel and have publicly notified those (i.e. March 2029).

A funding assumption will be needed, including:

- project management
- developing the process agreement
- establishment and operation of the spatial planning committee
- establishment and support of the secretariat
- communications and engagement with partners and stakeholders
- preparation of the draft regional spatial plan
    - resourcing for planners, GIs, infrastructure, administration and governance
    - resourcing in infrastructure teams and modelling capacity to support rapid testing and response to growth options, infrastructure costing, and strategic infrastructure planning and mapping (30+ years)
    - constraints mapping (uncertainty about how much will be new or able to be carried forward from existing plans)
    - the costs of the Independent Hearing Panel process.

Discussions with councils across regions are anticipated to include some of these costs, including how they can be shared.

We await confirmation from MCERT about national standards in relation to regional spatial plans eg standards to direct process, structure of RSP, how to identify various matters, what is “new” vs what can be carried through. This will influence budgets.

Natural Environment Plans and Land Use Plans

Notification of each of these will be required within nine months of decisions on the regional spatial plan having been notified (i.e. around December 2029 on current timeframes). Local authorities will have a further 12 months to make final decisions on and notify the final plans (i.e. around December 2030). Preparation of natural environment plans, and land use plans can commence as national standards are provided.

A funding assumption will be needed within LTPs, along similar lines to that for the regional spatial plan to prepare, notify and decide on the plans.

Climate Change Response Amendment Bill

On 15 July, the Climate Change Response Amendment Bill was introduced to Parliament. We understand that the Government intends to refer the Bill to Select Committee before the election, for enactment in early/mid 2027.

If enacted, this Bill would require local authorities to prepare and adopt climate adaptation plans for those areas identified as priority areas under a regional spatial plan. These adaptation plans may include areas other than priority areas.

The purpose of an adaptation plan is to—

(a) provide strategic planning and co-ordination of the actions and investment needed to manage climate-related natural hazard risks in a cost-effective way that accounts for the longer term; and

(b) communicate how those risks are intended to be managed by local authorities.

Due dates for the first adaptation plans for an area depend on the priority assigned to that area. Those that cover areas that the local authority has designated as priority one must be started within one year of the notification of the adopted regional spatial plan and completed within five years of notification. Plans for priority two areas must be started within six years of the regional spatial plan and completed within ten years of notification.

A funding and resourcing assumption will be required, that aligns with the regional spatial planning assumption.

The Bill makes no provision for any new or additional funding from central government to fund any adaptation projects or needs (no criticism is implied – none was any signalled in any policy decisions or prior communications).

Economy/Cost change

Taituarā commissions BERL to prepare an annual report that forecasts movements in local authority cost adjustors and a Local Government Cost Index. The report usually includes forecasts of key macroeconomic indicators such as the Consumer Price Index (headline inflation) and a discussion of the economic outlook.

An interim report was released on 10 August 2026, with the final report due for release on or before 28 October 2026. These dates are dependent on the release of economic data from Statistics New Zealand.

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LTP 2027/37 Assumptions Initial Assessment (at Aug 2026)

Notes

1: These assumpions are based from LTP 2024/34 with intial updates for 2027/37 and is subject to further development.

2: Level of uncertainty (Risk) Matrix used is provided at bottom of assumpitons table.

LTP Section	LTP 2024 Page No	Heading 1	Heading 2	Heading 3	Assumption	LIKELIHOOD OF CHANGE	CONSEQUENCE OR IMPACT OF CHANGE	LEVEL OF OF UNCERTAINTY (RISK)	REASON FOR UNCERTAINTY, IMPACT OF RISK:
04A Financial Strategy	TBA	Key assumptions		Residents	Residents Usually resident population 2027 2037 2057 19,100 20,609 23,328 Clutha's population is expected to have a stronger resident population growth, increasing to oiver 23,300 people by 2054. This is around 1,000 residents higher than the 2023 projections. At a settlement level, the highest growth rate in percentage per annum terms is Tapanui, Taieri Mouth and Waihola. In absolute terms, the hights overall growth is projected to occur in Balclutha and Milton.	1	2	LOW, MEDIUM HIGH CRITICAL	Significant increases in population are not anticipated. However should that occur it might place greater demands on services such as water, sewerage, solid waste and regulatory functions. If demand changes unexpectedly due to societal or demographic changes then capital and operating expenditure forecasts could be insufficient and Council would need to reassess budgets subject to urgency. Council's strategic approach to promote growth in the rating base and promote living and working in Clutha has been incorporated into this plan and is expected to facilitate growth in key areas e.g. in the Milton-Waihola area. Forestry growth has the potential to impact on population growth however planning framework amendments to allow Council's to have more control of forestry development mean this risk can be expected to be managed for
04A Financial Strategy	TBA	Key assumptions		Age Demographics	The age structure is projected to change quite significantly, with a higher proportion of residents aged 65 years and over. The proportion of children (14 years and under) and younger adults (15 to 39 years) is projected to decline. A major increase in older people is likely to change the type of services and ability to pay for those services. This is unlikely to result in new activities, rather types of services and how they are de- livered. The specifications of services such as footpaths and library services may need to be adapted but overall it is unlikely to result in significantly higher costs.	2	4	LOW, MEDIUM HIGH CRITICAL	The range of services utilised by older people is different from younger people. While the need for active team sports may decline there will still be demand for parks, reserves, pools, halls etc. There is expected to be increased demand for community facilities and activities such as walking and cycling. Meeting the needs of our residents is being updated through the Living & Working Strategy implementation through the Our Place Community Plans. Future demand and services are being explored and planned for as part of these updates. These include updates to services and facilities. Focus on rates and affordability is an ongoing focus for Council and this is included in the Financial Strategy.
04B Financial Strategy	TBA	Significant forecasting assumptions		Visitor growth	District visitor numbers 2027 2037 2057 Total visitors (average day) 9,929 11,088 13,666 Total visitors (peak day) 3,820 4,420 5,646 Visitor population on both the average and peak day is projected to increase annually by 1.1% during the term of this strategy. Reference:	3	2	LOW, MEDIUM HIGH CRITICAL	Very limited information available as to visitor numbers, as noted in the growth projection report commissioned by Council. Visitor numbers may increase demand on infrastructure and services such as water supply, Sewerage, solid waste, parking, public toilets and roading. The Clutha Destination Strategy is focusing on growth in visitor revenue rather than specifically on visitor numbers. The majority of Clutha's visitor market has been domestic and growth is anticipated to continue.
04-B Financial Strategy	TBA	Significant forecasting assumptions		Housing Growth	2027 2037 2057 9,125 9,861 11,247 This plan assumes that the number of dwellings will increase at an annual average growth rate of 0.7%. ~~Benhar, Bruce, Waihola and Taieri Mouth are expected to experience the higher growth subject to the avail- ability of residential development and services such as proposed water service improvements.~~	3	2	LOW, MEDIUM HIGH CRITICAL	Economic conditions and the changing nature of the housing market could cause variations from year to year. Projections for townships are more sensitive to variation where individual developments can influence overall forecasts, as has been shown in recent times with Council-facilitated developments e.g. in Balclutha, and Kaitangata, as part of Council's Living and Working Strategy

04-B Financial Strategy	TBA	Significant forecasting assumptions		Rating base	Total Rating Units 2027 2037 2057 13,122 13,697 15,634 Council's rating units are expected to increase incrementally on an average of 0.4% in the ten years to 2037, and 0.6% in the 30 years to 2054. Note: Rural, vacant and utilities were not projected/assumed unchanged.	3	2	LOW, MEDIUM HIGH CRITICAL	Increases or decreases to the rating base may affect the distribution and amount of rates to be paid. Council's strategic approach to promote growth in the rating base and promote living and working in Clutha aims to facilitate growth in the rating base over and above the 0.4% in the medium to longer term. The impacts are too difficult to forecast in detail at this point. Note that changes to the rating base are re-forecast on an annual basis through annual plan updates. Other factors may also affect growth (e.g. inland port)
04B Financial Strategy	TBA	Significant forecasting assumptions		Land use change (Regulatory - Noting Spatial Plan Process)	District Plan changes over the last 5 years for Balclutha, Stirling, and Milton means areas of land in and around these towns are rezoned to Urban, Transitional or Industrial Resource Areas. Most of this can be serviced by extending the existing infrastructure network, which is normally done at the developer's cost. This opens more residential choices whilst sustainably managing the rural environment. In industrial areas, Council wants to understand what opportunities there are to provide more industrial land so that we can continue to attract businesses to our community (Our Economy) without compromising the amenity values of our urban areas (Our People, Our Environment). We want to ensure our communities have the provisions to sustainably grow in the future.	2	2	LOW, MEDIUM HIGH CRITICAL	Updates to District Plan is currently on hold as New Zealand introduces new planning legislation and shifts towards spatial planning. Reforms to local government, including the potential of amalgamations, also affect potential land use changes. As such, the level of uncertainty is "Medium/High" for the period of 2027-37. Whilst a low risk due to the planning and lead in time managed via the District Plan process. Forestry growth has the potential to impact on land use however planning framework amendments to allow Council's to have more control of forestry development mean this risk can be expected to be managed for should Council decided to do so. The National Policy Statement on Highly Productive Land has the potential to restrict
04B Financial Strategy	TBA	Significant forecasting assumptions		Resource consents (Regulatory)	It is assumed that Council will meet consent conditions and that conditions of resource consents currently held will not be significantly altered. It is assumed that updates to attain consent renewals will progress as programmed and that they can be achieved within allocated budgets.			LOW, MEDIUM HIGH CRITICAL	When there is information about what will be required, Council has indicated it will then be in a position to assess the financial impact. If requirements increase and additional work is required for consent conditions Council will need to provide rate funding to meet the requirements or request a change of consent conditions. As external agencies' plans are developed, we expect to be in a position to provide further information. Council
04C Financial Strategy	TBA	General Assumptions		Climate Change (ISD)	Our changing climate is an area of focus for both our communities and the Council. Council has an important role to play, particularly as the provider of critical infrastructure that underpins the daily lives of our communities. Council draft Clutha District Climate Change Strategy provides an understanding of the likely impacts for our district, which indicates our district will become warmer and wetter with more water flowing in the Clutha River. This brings opportunities for improved winter pasture growth and possible challenges with the potential for increase flood frequency and severity. Modelling done specifically for our region gives us the opportunity to make changes to our infrastructure over time. Council has begun working on its response to climate change Our infrastructure strategy assumes the effects of climate change will be felt gradually, allowing Council time to plan and prepare its response and options around services and infrastructure.	3	2	LOW, MEDIUM HIGH CRITICAL	NOTE: Describe mandate shift from RCP8.5 modelling to SSP modelling as result of IPCC guidance and Minister/Government directive. This may impact the level of uncertainty. If the impacts of climate change are felt sooner than expected there may be demands on Council's budgets. Council's ability to deliver the same level of service to the community may be impacted if climate change occurs faster than expected or to a greater extent. If this occurs it may require unbudgeted emergency work to be carried out and/ or create additional costs to mitigate impacts, such as improving protection of critical infrastructure or increasing maintenance. Council self-insures for underground assets to help provide for emergency work if required. In the short term, Council will ensure that future assets are of sufficient standard to cater for predicted climate change, including rainfall and sea level rise.
04C Financial Strategy	TBA	General Assumptions		Natural Disasters (ISD)	The plan assumes that Council and the community will be prepared to respond to any natural hazards including floods, storm and earthquakes that might occur during the life of this plan. It is assumed that there will be no natural disasters requiring emergency work that cannot be funded from existing budgets, reserves, Council's insurance policies or via central government assistance.	3	2	LOW, MEDIUM HIGH CRITICAL	The timing and scope of natural disasters are unpredictable. There have been an increasing number of disasters including earthquakes and floods in New Zealand during the past decade. A major event would impact on Council through the need for immediate funding, and depending on the scale, duration and location of the event, there could be unforeseen costs in terms of damage to Council assets. Depending upon the severity or timing of disasters, Council may not have enough staff to rapidly manage recovery and response. The lives of residents and continuity for businesses could also be affected as key services such as water, sewerage and roads could be disrupted for considerable periods. The risk is reduced in Clutha because of its size and the number or widespread rural

04C Financial Strategy	TBA	General Assumptions		~~Legislative Changes including Three Wates Reform~~ Southern Waters CCO transition (Policy, Three Waters, Finance%)	As a result of the Local Water Done Well reforms, Clutha District Council formed a Council Controlled Organisation (CCO), Southern Waters Limited, with Central Otago, Gore and Waitaki district councils to adminster water services across the four districts. Clutha District Council's Water Services Delivery Plan (WSDP) was approved by the Government in 2025 and Southern Waters Limited was incorporated on 1 May 2026. Clutha District Council's Water Services and Infrastructure will be transferred to the CCO effective 1 July 2027. While the CCO has been established and Council's WSDP approved, Council has responsibilities in ensuring that Waters Services and Infrastructure are successfully transferred and ongoing governance through the statement of expectations and stakeholder representative group. The successful transition also assumes that the CCO achieving its timeframes for staffing, board appointments, systems and governance arrangements. There are risks involved in case timeframes are not met. The Clutha District has experienced a transformative period in managing its three waters services since 2021, with further changes anticipated. In addressing past operational challenges, including legal action related to wastewater treatment non-compliance, the Council has undertaken a commitment to meet stricter Resource Consent assessments and adhere to the elevated standards set by Taumata Arowai under the new Water Services (Drinking Water Standards for New Zealand) Regulations 2022. To align with these enhanced requirements, the Council has bolstered its resources and engaged in new maintenance contracts for service delivery. The transition to a new asset ownership and management model under 3 Waters reform has been repealed. Consequently, this document presents an alternative path, albeit with less preparatory	3	3	LOW, MEDIUM HIGH CRITICAL	Our community needs three waters services regardless of whether Council delivers or not. On this basis we have included three waters in our financial and infrastructure strategies, including the Greenfield proposal, to present the community with a complete and accurate a set of financial information for the medium-term and long-term financial impact.
	TBA			Legislative Changes - Simplifying Local Government (Policy)	The Government has announced a proposal to significantly reform local government in New Zealand. As part of its Simplifying Local Government programme, the Government has initiated a Head Start Pathway to invite Councils to submit amalgamation proposals, with the preference being given to one region one unitary authority. As part of this programme, regional councils will no longer exist at a governance level. Councils that are not accepted or do not participate in the Head Start Pathway will be subject to a Government determined backstop process, where the Government will invesitigate and determine the future for those councils. Proposals for Head Start Pathway are due 9 August (to be updated - Simplifying Local Government (Head Start Pathway))	4	4		
	TBA			Legislative Reform - Rates Capping (Policy/Finance)	The Government has announced a rates capping proposal, to commence in 1 July 2029 (Year 3 of the LTP27/37). Government's initial proposal is that the cap will like be between 2-4% per annum, which detailed mechanism to be outlined further. [Legislation to effect the rates cap was initiallly slated to be introduced in 2026). While the rates capping is proposed to take effect from 1 July 2029, the Government noted that monitoring as to rate increases will occur in the interim period. Final rate capping model and application will be dependent on the final legislation.	4	4	LOW, MEDIUM HIGH CRITICAL	Rates capping could severely impact local government's financial position and the levels of service. Rating agencies have also noted that rates caps could affect financial ratings for local government. Significant uncertainty exist at this stage as to the wording of the final legislation, which could have material impact on: - level of rates cap, including how it will be calculated - application of rates cap (whether to individual rating categories or to overass) - Government's initial position was that the rates cap would apply to each category of rates - exemptions and how applications for exemptions will be made and assessed - role of regulatory
	TBA			Legislative Reform - Other Reform	Planning Reform CDEM Reporting changes LTP - Activities	3	4	LOW, MEDIUM HIGH CRITICAL	

04C Financial Strategy	TBA	General Assumptions		Levels of service (Whole of Council)	This plan assumes that aside from where level of service changes have been specifically outlined and included for consultation to inform the final plan, demand for council services and customer expectations will not significantly change. It is assumed beyond those service levels raised, there will be no significant effect on asset requirements or operating expenditure. We prioritise investment in infrastructure that balances cost, risk, and service levels.	3	2	LOW, MEDIUM HIGH CRITICAL	Council has defined levels of service for its planned activities that have been reviewed as part of the LTP process. Council is aiming for increased compliance with drinking water standards and resource consents. Resident satisfaction surveys generally support this key assumption and there are currently no areas of the Council's service that require significant modification. If higher levels of service are to be considered during the life of this plan, levels of expenditure and capital works would need to be reassessed, and would impact on rates.
04C Financial Strategy	TBA	General Assumptions		Useful lives of significant assets (Infrastructure, Community Facilities)	The useful lives of all assets will be in accordance with the depreciation rates set out in the accounting policies of Council. It is assumed remaining life forecasts for significant assets are correct and renewal forecasts are accurate. Our Approach: We're aiming to have the funds needed, or capacity to borrow, to replace assets when they wear out (renew assets at the end of their economic life).	2	3	LOW, MEDIUM HIGH CRITICAL	Useful lives are used to calculate annual depreciation. Where useful lives are incorrect the depreciation funded may be funded at the wrong level or depreciation may not have been funded for the entire life of the asset. If remaining lives vary from those predicted, renewals and replacement may have to be undertaken more or less frequently, impacting on capital budgets. There is no certainty that asset components
04C Financial Strategy	TBA	General Assumptions		Revaluation of non-current assets (infrastructure, water to be removed)	The roading network and utility assets (water, sewerage, stormwater) are to be revalued in 2022/23, 2026/27 and 2029/30. Infrastructure revaluations impact on the depreciation calculation. Where price levels change the depreciation funded may be at the wrong level. Revaluations are expected to be positive and not to have a material impact if the assumption is incorrect. Reference:	3	3	LOW, MEDIUM HIGH CRITICAL	If price level changes are significantly higher or lower, depreciation and the funding of depreciation could be over or under stated. Depending on circumstances the revaluation period maybe shorter or longer. It is noted that the budgeted amounts include the effects of inflation. The plans and forecasts for the first three years have the most detail and confidence as the greatest amount of planning has taken place. The investments identified between four and ten
04D Financial Strategy	TBA	Financial Assumptions		Contracts (Infrastructure)	This plan assumes there will be no significant variations in the price of re-tendering operating and maintenance contracts during this plan other than forecast escalation.	4	3	LOW, MEDIUM HIGH CRITICAL	If contract prices were to increase significantly, Council would review the work programme and levels of service. Council is in negotiation an extension of the Solid Waste contract to coincide with possible changes related to resource consent renewal for Mt Cooee and these are expected to result in increased costs. Overall exposure is slightly lower as roading maintenance contract does not come up for renewal during the term of this plan.
04D Financial Strategy	TBA	Financial Assumptions		Capital project costs (Infrastructure)	On average, capital project costs will not vary significantly from estimates included in this plan.	4	3	LOW, MEDIUM HIGH CRITICAL	Council has a higher level of confidence regarding capital project costs in the short term (1-2 years) of this plan but less certainty in the longer term due to possible fluctuations in the economy, consent conditions etc. Any increase in costs may result in higher loan funding requirements and rates. To mitigate this, Council has processes in place that if projects are outside a financial parameter they are reassessed.
04D Financial Strategy	TBA	Financial Assumptions		Capital project completion (Infrastructure)	TThat Council will complete capital projects as budgeted.	3	3	LOW, MEDIUM HIGH CRITICAL	Based on historical completion rates there is a risk that the capital works programme will not be completed fully in any given year of this plan. Council is expecting to increase completion rates due to a number of improvements including increased resourcing for project management and procurement improvements. Several significant contracts have also been confirmed to enable delivery. Council
04D Financial Strategy	TBA	Financial Assumptions		Price level changes (Infrastructure, Finance)	Price level changes have been calculated using projections prepared by Business & Economic Research Ltd (BERL). The appended Price Level Changes table depicts the annual price level changes as indicated by BERL which are based upon 2026 values.	3	3	LOW, MEDIUM HIGH CRITICAL	Inflation is affected by external economic factors. The result of any variations up or down will result in higher or lower rates requirements, which may also impact on the levels of service, in particular for roading, water, wastewater and stormwater.
04D Financial Strategy	TBA	Financial Assumptions		Service Levels (Infrastructure, Community, remove water)	Council is proposing several service level changes including: •Upgrading urban and rural water schemes to meet national standards •Upgrading wastewater infrastructure to improve the quality of discharges •Increasing stormwater capacity to reduce risks of localised flooding •Outside of these it is assumed service levels are expected to remain unchanged.	3	4	LOW, MEDIUM HIGH CRITICAL	If Council has not adequately engaged with the community on statutory requirements on changes to service levels or service levels are perceived to be unaffordable and not accepted by the community.
04D Financial Strategy	TBA	Financial Assumptions		Forecasted return on investments (Finance)	A return of 5.25% is budgeted for returns on investments. (See Financial Strategy for Sensitivity Analysis)	3	2	LOW, MEDIUM HIGH CRITICAL	Investments are an important part of our financial mix, so any changes in returns could have a major impact. Any significant drop of interest rate will mean lower returns than anticipated and impact on the amount we can use to off-set rates or put into projects that promote living and working in Clutha. There is a level of certainty in years 1-2 with increasing uncertainty after that. The risk is partly mitigated by re-forecasting on an annual basis through annual plan updates.

04D Financial Strategy	TBA	Financial Assumptions		Expected rates on borrowing (Finance)	Interest on existing and new internal borrowing is allowed for at 5.25% over the term of the borrowing.	3	2	LOW, MEDIUM HIGH CRITICAL	The risk is partly mitigated by re-forecasting on an annual basis through annual plan updates. A change in interest means the rating requirement for the cost of financing as well as the loan repayment would change as illustrated in the sensitivity analysis below.
	TBA	Financial Assumptions		Expected level of external borrowing (Finance)	As a result of an updated focus on maximising investment returns, Council's level of liquidity is expected to change, and external borrowing is forecast during this LTP. Council is part of the Local Government Funding Agency (LGFA) as a guaranteeing borrower. A forecast rate of 5.25% has been used as the average cost of borrowing Refer Financial Strategy for Sensivity Analysis;	3	2	LOW, MEDIUM HIGH CRITICAL	The risk is partly mitigated by re-forecasting on an annual basis through annual plan updates. A change in interest means the rating requirement for the cost of financing as well as the loan repayment would change as illustrated in the sensitivity analysis below.
04D Financial Strategy	TBA	Financial Assumptions		Renewable or otherwise of external funding (Finance)	Higher cost of short-term borrowing and inability to meet liquidity shortfalls.	2	3	LOW, MEDIUM HIGH CRITICAL	Higher cost of short term borrowing and inability to meet liquidity shortfalls.
	TBA			Credit Rating (Finance)	Council will obtain a credit rating from Fitch Ratings of AA- or above and will maintain this for the ten years of the plan	3	2	LOW, MEDIUM	Not obtaining a credit rating will affect out ability to borrow from the Local Government Funding Authority and obtain lower interest rates
04D Financial Strategy	TBA	Financial Assumptions		Waka Kotahi Transport Agency Financial Assistance Rate (Finance, Infrastructure)	A major source of funding for our transportation network comes from NZ Transport Agency (NZTA), Waka Kotahi. A baseline level of funding (67%) has been confirmed by NZTA for Years 1 to 3 for the operation, maintenance, and renewal of the existing roading network, as well as for improvements that meet the national outcome priorities. This co-investment now makes up a significant proportion of Council's overall roading programme. Co-investment is conditional on the planned transportation activities delivering national priorities and criteria. It is very important we work collaboratively with NZTA, Waka Kotahi to deliver these national priorities. These are set every 3 years through the Government Policy Statement on Land Transport.	4	4	LOW, MEDIUM HIGH CRITICAL	If there are changes or reductions, Council will have to reconsider the level of delivery for the financially- assisted programme. This is considered a critical risk in view of the Government's potential reviews of transport funding the details which are unknown at this time.
04D Financial Strategy	TBA	Financial Assumptions		Depreciation rates on planned asset acquisitions (Finance, Infrastructure)	If depreciation costs are significantly higher than budgeted, rates would increase to balance the budget.	2	3	LOW, MEDIUM HIGH CRITICAL	If depreciation costs are significantly higher than budgeted, rates would increase to balance the budget.
04D Financial Strategy	TBA	Financial Assumptions		Depreciation funding (Finance, Infrastructure)	The current LTP includes funding 25% of the calculated depreciation cost in years 1 to 5 and 50% of the depreciation costs in years 6 to 10. The plan also includes funding depreciation of any growth or level of service capital works so in dollar terms this sees a significant increase in depreciation funding over the 10 year period of the plan.	3	2	LOW, MEDIUM HIGH CRITICAL	Depreciation funding is intended to reflect the 'decline in service potential' of an asset and to ensure that the current customers are paying their fair share. It is also used to fund renewal or other capital works. The risk associated with phasing in depreciation funding is considered low as Council is intending to fully loan fund the proposed capital works programme and also pay interest and principal payments during this period.
05A Council Activities Community Leaderships	TBA	Calls we have made in putting budgets for this plan together		Amalgamation/Boundary Changes (Policy)	Update with information re: Simplifying Local Government Council is assuming that the Clutha District will retain its existing boundaries, functions and status as a territorial authority during the life of this plan	1	3	LOW, MEDIUM HIGH CRITICAL	Update with information re: Simplifying Local Government and Head Start Pathway Should amalgamation with neighbouring authorities or significant boundary changes take place, this would significantly impact on all of this plan in its entirety.
05A Council Activities Community Leaderships	TBA	Calls we have made in putting budgets for this plan together		Representation arrangements (Policy)	Council assumes that the current structure of representation will not change significantly.	2	3	LOW, MEDIUM HIGH CRITICAL	In general, any changes to representation arrangements will not have significant budgetary implications. However, there would be changes to rates based on electoral ward
05C Council Activities - Economic and Community Development	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for economic and community development	Current delivery of services (Policy, all of Council)	These budgets assume that the current method of delivery of services will continue, i.e. youth, economic and tourism development are contracted services. It is assumed that community development will continue to be carried out in-house.	2	3	LOW, MEDIUM HIGH CRITICAL	If this changes levels of funding and/or levels of service might be affected.
05C Council Activities - Economic and Community Development	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for economic and community development	Funding for youth services (Community Services)	Council has assumed it will continue to partner with other funders and part-fund contracted services for youth development in current levels.	3	2	LOW, MEDIUM HIGH CRITICAL	f availability of funding from other funders changes Council would need to review levels of funding and/or levels of service

05C Council Activities - Economic and Community Development	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for economic and community development	Funding for community grants (Community Services)	These budgets allow for grants and community contract services funding to continue at current levels.	3	2	LOW, MEDIUM HIGH CRITICAL	Grants and community-contract services funding will be reviewed on a triennial basis as part of the development of the Long Term Plan. Continuation of funding will be considered on a case-by-case basis.
05E Council Activities - Transportation	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for transportation	Roading maintenance contract renewal (12) (ISD)	The awarded new Maintenance and Operations 5-year contract price exceeded 2022/24 expectations. Funding request to NZTA Waka Kotahi for 2027/27 now reflects the original LoS and associated budget	2	3	LOW, MEDIUM HIGH CRITICAL	Operating and maintenance expenditure forecasts for 2024/25 onwards would be lower than required and work would have to be reprioritised or additional funding sought.
05E Council Activities - Transportation	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for transportation	NZTA Waka Kotahi Co-Funding (16, 17) (ISD)	Based on representation and advice from NZTA Waka Kotahi, Council will receive a financial assistance rate of 67% for the 2024/27 period and this has been assumed for the ten year life of this plan. NZTA Waka Kotahi funding will not be confirmed until after the adoption of this plan, with no preliminary funding level approval received at this point in time. This plan assumes that Waka Kotahi's availability of funding will resume (increase) in years 4 to 10 of this plan.	2	3	LOW, MEDIUM HIGH CRITICAL	Work programmes, levels of service and rates for roading will be continually reviewed through Annual Plan and Long Term Plan updates
05E Council Activities - Transportation	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for transportation	Levels of Service: One Network Framework ONF (7) (ISD)	The levels of service currently provided will continue to be measured against those of the ONF and it is predicted that for the foreseeable future, changes may be required. There is some uncertainty around how this will affect funding levels outside year 4 (from 2024/25 onwards), particularly as the ONF is embedded and performance measures are developed. It is anticipated that further assessments against the ONF through 2024/27 will reduce this uncertainty.	2	3	LOW, MEDIUM HIGH CRITICAL	If the expected levels of service significantly increase or are above those supported by the ONRC/ONF Waka Kotahi, then such higher levels of service may have to be100% funded by Council, which has not been budgeted for.
05F Council Activities - Transportation	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for transportation	Useful lives of roading assets (3) (ISD)	The remaining life details in the Roading Asset Management System (RAMM) and Clutha's deterioration modelling system (dTIMS) databases are accurate. These include built in assumptions that the number, weight and configuration of future HCVs will not change markedly from what is currently being seen and that HPMVs will be limited in where they can travel. It is assumed that budgets at the revised requested levels to NZTA Waka Kotahi will mean that the remaining lives of assets (design life for top surface is currently 15 years, design life for rehabs is currently 80 years) will be exceeded. This includes the decision to try to extend the lives of sealed roads through a reduction in annual renewals and a stronger focus on maintenance such as improved drainage.	2	3	LOW, MEDIUM HIGH CRITICAL	If remaining lives are shorter than predicted then renewals would have to be undertaken more frequently, impacting on capital renewals budgets. If budgets are not available, focus will be on keeping top surface water resistant, with money concentrated on reseals rather than rehabs. If additional funding is required but not available for rehabilitations this will either result in increased maintenance or providing a lower level of service.
05F Council Activities - Transportation	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for transportation	Impacts of climate change on roading (9) (ISD)	Climate change is expected to cause sea-level rise and increased frequency of storm events. Sea level changes are not expected to have an impact on roading assets during the life of this plan. However increased storm events and associated flooding are expected to increase the risk of road closures and failure at culverts and bridges	2	3	LOW, MEDIUM HIGH CRITICAL	If repairs of the roading network as a result of extreme weather events exceed the available budgets, this may affect priorities for other roading projects.
05F Council Activities - Transportation	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for transportation	Impact of natural disasters (22) (ISD)	In terms of costs of natural disasters, it is assumed that government assistance together with insurance and Council's Emergency Fund would cover Council's share for the repair/ replacement of roading assets.	2	3	LOW, MEDIUM HIGH CRITICAL	Depending upon the scale and cost of the emergency some assets either won't be replaced/ repaired or will take longer to replace/repair. If roads are disrupted for a period of time this can have significant flow on effects for users.
05F Council Activities - Transportation	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for transportation	Volatility of oil based supplies (ISD)	Recent contract prices and the 30-year reseal / rehabilitation programme has accounted as far as possible for general construction prices as well as acknowledge oil prices will remain volatile for the foreseeable future. Budgets have .made allowance for this, but whether at an appropriate level remains uncertain	3	3	LOW, MEDIUM HIGH CRITICAL	Historically, work programmes have been adjusted accordingly to account for price variability in oil based supplies. This approach is assumed to be sustainable over the next ten years

05N Council Activities – Stormwater	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for stormwater	Increasing environmental standards (TO REMOVE - for CCO)	In accordance with proposed Otago Regional Plan changes, it is expected there will be stricter requirements around the quality of 3-Waters discharges. In addition, the community's capacity to fund any required upgrades to ensure compliance with ORC Plan Changes will need to be considered and included in the implementation timeframe.	3	3	LOW, MEDIUM HIGH CRITICAL	Increasing environmental standards may have significant bearing on stormwater costs. If they become mandatory prior to 2024, Council will need to reassess and reprioritise budgets in order to meet the increased standards.
05N Council Activities – Stormwater	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for stormwater	Impacts of climate change on stormwater (TO REMOVE - for CCO)	The frequency and intensity of heavy rainfall events is predicted to increase as a result of a warmer climate. Any such increase is likely to impact on stormwater flows and put more pressure on Council's stormwater systems. Ongoing sea-level rise may impact on stormwater infrastructure at Kaitangata, Kaka Point, Milton, Pounawea, and Waihola. Current budgets don't include provision for specific works resulting from climate change; however anticipated peak flows are adjusted during design work to take into account the latest available information.	3	2	LOW, MEDIUM HIGH CRITICAL	Further investigate work may determine that further capital works are needed to address the impacts of climate change on stormwater infrastructure, with flow on impacts for budgets
05N Council Activities – Stormwater	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for stormwater	Implications of natural disasters for stormwater (TO REMOVE - for CCO)	In terms of costs of natural disasters, it is assumed that the current level of insurance, Council's Emergency Fund, combined with underground asset self-insurance would cover the repair/replacement of stormwater assets.	2	3	LOW, MEDIUM HIGH CRITICAL	Depending upon the scale and cost of the emergency some assets either won't be replaced/ repaired or will take longer to replace/repair. If schemes are disrupted for a period of time this can have significant flow on effects for its users
05P Council Activities – Solid waste	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for solid waste	Meeting resource consents (ISD)	Council is assuming that Mt Cooee will continue to meet resource consent conditions to continue operating as a landfill, and that there will be no major changes to the regulatory environment or resource consent requirements with the new consent in 2024. Council is also assuming it will continue to meet resource consent conditions for closed landfills and post closure costs will continue as budgeted.	3	2	LOW, MEDIUM HIGH CRITICAL	If renewal is unsuccessful there will be significant costs involved in closing Mt Cooee landfill, setting up a resource recovery park and transporting the waste to a landfill outside of the district.
05P Council Activities – Solid waste	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for solid waste	Renewing Mt Cooee's resource consent in 2023 (ISD, Regulatory)	Council is also assuming we will successfully renew the resource consent to continue to operate Mt Cooee from 2024 onwards.	2	2	LOW, MEDIUM HIGH CRITICAL	If renewal is unsuccessful there will be significant costs involved in closing Mt Cooee landfill, setting up a resource recovery park and transporting the waste to a landfill outside of the district.
05P Council Activities – Solid waste	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for solid waste	Amount of waste to landfill (ISD)	Currently this is 9,400 tonnes or 532 kg per person per annum based on 17,667 residents. Council is forecasting a slight decrease due to increased user charges and recycling initiatives. It is assuming that there won't be fluctuations including any increases in waste. There is a risk that operating the landfill at the current levels of service may become uneconomic. At this stage Council assumes it will continue with the current level of service and opening hours for Mt Cooee.	3	2	LOW, MEDIUM HIGH CRITICAL	If the anticipated volumes of waste to landfill are incorrect this would alter the amount Council pays for its Waste Levy and ETS liability. If the amount of waste going to landfill decreases significantly this will impact on revenue collected and the affect could be an increase to user charges. If there is a significant decrease in waste this may affect the economic viability of Mt Cooee continuing to operate. It may be necessary to reduce opening hours/access to Mt Cooee in order to reduce operating costs. If waste volumes are drastically reduced then this may force the early closure of the site. Alternatively, if major changes arise (e.g. a new industry develops in the Clutha District), then waste volumes to Mt Cooee may increase, reducing the lifespan
05Q Council Activities – Solid Waste	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for solid waste	Increased user charges and fly-tipping (ISD)	Mt Cooee charges are still some of the lowest in the South Island. Council is assuming that there won't be an increase in fly-tipping as a result of increased landfill charges.	3	2	LOW, MEDIUM HIGH CRITICAL	In the past there has been anecdotal evidence of a direct relationship between increases in Mt Cooee charges and incidence of 'fly-tipping'. No additional budgets have been included in this plan for dealing with increased fly-tipping.
05Q Council Activities – Solid Waste	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for solid waste	Levels of service (ISD)	Council is required to continue to provide waste management and collection service to residents. A proposed Resource Recovery Centre and Transfer Station will see an improvement in the level of service provided, removing the need to take waste to the tip face and increasing the amount of waste diverted from MT Cooee. There are currently plans to implement a kerbside collection of green waste or glass. There will be additional budgets required for glass and organic waste collections. Council will continue to evaluate options for these collections as they become available.	3	2	LOW, MEDIUM HIGH CRITICAL	Additional budgets may be required to introduce these increased levels of service. Should council not proceed with a Resource Recovery Centre and Transfer Station there would be no change to the current level of service as required by the New Zealand Waste Strategy and the WMMP.

05Q Council Activities – Solid Waste	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for solid waste	Emissions Trading Scheme (ETS) (Finance)	It is anticipated that carbon credit prices will continue to rise over time, driven by legislative changes (including removal of a previous carbon cap of $35 per tonne). Budgets have assumed forecast pricing of $80 tonne and assumed that future increases will be matched by a reduction in voulume.	3	2	LOW, MEDIUM HIGH CRITICAL	Additional costs for ETS liability will result in increased user charges. Liabilities associated with the ETS may be less if greenwaste shredding/processing is viable for Mount Cooee. ETS Costs may increase if the cost of buying carbon credits is greater than assumed.
05S Council Activities – Community Services	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for community services	Community housing programme (Community Services)	We have assumed that: •There is sufficient capacity in construction industry, and that identified land is suitable for building additional new housing units. •The availability of proposed vacant new build units takes place and will be key to relocate existing tenants while renewal work is carried out on existing units.	3	2	LOW, MEDIUM HIGH CRITICAL	Construction of new units has been deferred to . If proposed new vacant units are not available alternative funding arrangements may be required for accommodation of current tenants, or the renewal programme may be delayed.
05S Council Activities – Community Services	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for community services	Community halls divestment programme (Community Services)	We have assumed budgets for community halls includes provision for basic levels of maintenance to include maintaining halls to a weather tight and safe condition during the 2024/34 period. Budgets do not include costs for additional maintenance or seismic strengthening work. These will be addressed through community consultation and divestment for halls on a case-by-case basis.	3	2	LOW, MEDIUM HIGH CRITICAL	If additional funding is required this could impact on rates, and would be assess on a case-by-case basis
05U Council Activities – Regulatory and Emergency Services	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for regulatory and emergency services	Environmental Management & Planning Changes (Regulatory, Policy)	Council assumes that, the incoming Government's most significant RMA and Water Services reforms and/or 'roll-back's have been either implemented or outlined/known and have been now taking into account to the extent possible (eg the most significant being 3 waters changes). Tow areas of uncertainty include Governments in relation to water CCO's and the Otago Regional Council's proposed Land and Water Plan. It is assumed these will be managed within existing frameworks and responsibilities.	4	3	LOW, MEDIUM HIGH CRITICAL	That Council's responsibilities regarding environmental management and planning could significantly change which could have flow on resourcing and budgetary implications
	TBA	Calls we have made in putting budgets for this plan together		Reform - Changes to LTP Reporting (Policy)	Placeholder for Government proposed changes to LTP reporting categories			LOW, MEDIUM HIGH CRITICAL	

CCO Transition
Govt reform - incl. amalgamation

Former LTP Water Assumptions - to be made available to CCO

05H Council Activities – Water Supply	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for water	Meeting drinking water standards (TO REMOVE - for CCO?)	Balclutha, Kaitangata, Milton and Lawrence treatment plants have recently been upgraded to be capable of producing water that is compliant with Drinking Water Standards NZ: 2005 (revised 2008). Compliance with the standards will require significant capital investment to rural treatment plants and Council has committed to a programme of upgrades. It is assumed budgets in this plan will meet the costs of these upgrades	3	3	LOW, MEDIUM HIGH CRITICAL	If more than the $4 million budgeted is needed for the upgrades, Council's strategy towards meeting the standards would need to be reassessed
05H Council Activities – Water Supply	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for water	Increasing demand for water (TO REMOVE - for CCO?)	Increased demand for rural water is expected due to continued conversion from pastoral to dairy farming and increasing herd sizes (although at slower rates than experienced in recent times). During the life of this plan Council will aim to supply additional water units where this is feasible and economically viable. Council's approach to servicing any new major industries is to consider any proposal on a case-by-case basis. Provision of adequate water would be a fundamental issue for resolution by negotiation during project feasibility investigations. Increasing the supply of water in the Waihola-Milburn area will continue to be investigated during the life of this plan, with provision programmed in 2024/25	2	3	LOW, MEDIUM HIGH CRITICAL	If additional demand or new water infrastructure is required, this would need to be assessed including budgetary/financial impacts

05I Council Activities – Water Supply	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for water	Implications of natural disaster for water (TO REMOVE - for CCO?)	In terms of costs of natural disasters, it is assumed that the current level of insurance, Council's Emergency Fund, combined with underground asset self-insurance would cover the repair/replacement of water assets	2	3	LOW, MEDIUM HIGH CRITICAL	Depending upon the scale and cost of the emergency some assets either won't be replaced/repaired or will take longer to replace/repair. If schemes are disrupted for a period of time this can have significant flow on effects for its users
05I Council Activities – Water Supply	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for water	Impacts of climate change on water (TO REMOVE - for CCO?)	Main risks include (1) changes in climate could result in reduced stream flows and groundwater levels, which could limit some traditional water sources (although the Clutha River is unlikely to be affected); (2) warmer temperatures could increase overall demand for water; (3) an increase in the frequency and intensity of heavy rainfall and flood events could result in a risk to water infrastructure; (4) ongoing sea-level rise may impact on water infrastructure in low-lying coastal communities. Modelling done specifically for our region gives us the opportunity to make changes to our infrastructure over time. Council has begun working on its response to climate change. A key project is the Greenfield water scheme. We're assuming the effects of climate change will be felt gradually, allowing Council time to plan and prepare its response and options around service and infrastructure.	3	2	LOW, MEDIUM HIGH CRITICAL	If the impacts of climate change take place at a faster rate than modelling has forecast, decisions and capital projects would need to be considered sooner, with flow on impacts for budgets and funding.
05K Council Activities – Waste Water	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for sewerage	Resource consents (TO REMOVE - for CCO to manage RCs?)	t is assumed that Council will meet consent conditions and that conditions of resource consents currently held will not be significantly altered. It is assumed that updates to attain consent renewals will progress as programmed and that they can be achieved within allocated budgets.	3	3	LOW, MEDIUM HIGH CRITICAL	If requirements increase and additional work is required for consent conditions, Council will need to provide rate funding to meet the requirements or request a change of consent conditions.
05K Council Activities – Waste Water	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for sewerage	Levels of service/demand for sewerage services (TO REMOVE - for CCO)	In recent years, the provision of sewerage services has been extended to Benhar, Tokoiti and Pounawea. This plan assumes that there are no other known residential or industrial developments that would change levels of service and network demand	2	3	LOW, MEDIUM HIGH CRITICAL	Council's approach to servicing new industries is to consider any proposal on a case-by-case basis. Provision of sewerage would be considered in conjunction with relevant parties during the project feasibility investigations. This would determine if there are any flow on budget implications that need to be planned for.
05K Council Activities – Waste Water	TBA	Calls we have made in putting budgets for this plan together	Key planning assumptions for sewerage	Implications of natural disasters for sewerage (TO REMOVE - for CCO)	In terms of costs of natural disasters, it is assumed that the current level of insurance, Council's Emergency Fund, combined with underground asset self-insurance would cover the repair/replacement of sewerage assets.	2	3	LOW, MEDIUM HIGH CRITICAL	Depending upon the scale and cost of the emergency, some assets either won't be replaced/ repaired or will take longer to replace/repair. If schemes are disrupted for a period of time this can have significant flow on effects for its users

05K Council Activities – Waste Water	TBA	Calls we have made continued	Key planning assumptions for sewerage	Impacts of climate change on sewerage (TO REMOVE - for CCO)	The key points to signal to the community and to underpin climate change assumptions are: •More temperature extremes and dry days up to 20 more hot days (days >30°C), and up to 50 fewer frost days (days <0°C), may be expected by 2090. The highest increases in temperature are predicted for West Otago. By the end of the century, The Catlins may experience up to four additional dry days per year, while the Clutha Valley, Milton and Waihola areas are likely to experience fewer dry days and overall wetter conditions. •More Intense Rainfall and Localised Flooding (where >25 mm of rain falls) are expected to increase (by 0 to 5 days), with the largest increases in The Catlins and over the Old Man Range by 2090. Rainfall totals during high intensity events are predicted to increase across the district, potentially leading to more frequent localised flooding. •The Clutha River is expected to experience an overall increase in river flow, especially during the winter and spring months, due to more precipitation in the upper catchment. •Coastal Risks from Rising Sea Levels: Low-lying coastal settlements and the infrastructure that supports them will, over time, become increasingly susceptible to inundation. This includes low-lying parts of the Taieri Mouth, Toko Mouth, Kaitangata, Kaka Point, Pounawea and Jacks Bay settlements. Rural areas such as Molyneux Bay may also be affected. This modelling, done specifically for our region, gives us the opportunity to make changes to our infrastructure over time that will help us continue to thrive.	3	2	LOW, MEDIUM HIGH CRITICAL	These factors are taken into account as part of resource consent renewals. Further investigative work may determine further capital works are needed to address the impacts of climate change on sewerage infrastructure, with flow on impacts for budgets

Table : Levels of Risk

Note: Adapted for LTP use from the Clutha District Council Risk Management Framework 2017, Table 3 (M-files 149053)

Determine the current level of assumption risk using the Risk Matrix below

	CONSEQUENCE or IMPACT				
LIKELIHOOD	**1 Insignificant**	**2 Minor**	**3 Moderate**	**4 Major**	**5 Catastrophic**
5 Almost Certain	H	H	C	C	C
4 Likely	M	H	H	C	C
3 Possible	L	M	H	C	C
2 Unlikely	L	L	M	H	C
1 Rare	L	L	M	H	H

Level 4	Critical risk	Mitigation measures to be identified to reduce risk – or if not possible ongoing monitoring of assumption and potential impacts required during delivery of LTP
Level 3	High risk	Mitigation measures to be identified to reduce risk – or if not possible ongoing monitoring (monthly) of assumption and potential impacts required during delivery of LTP
Level 2	Medium risk	Mitigation measures to be identified to reduce risk – or if not possible periodic (half yearly) monitoring of assumption and potential impacts required during delivery of LT
Level 1	Low risk	Tolerate if risk if impacts on LTP can be managed

Long Term Plan 2027

Workshop Topic	Open Spaces AMP
Workshop Date	17 September 2026
Session Number	4
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M-Files Ref	1057767

SUMMARY
This report provides a detailed breakdown of the Parks component of the revised Open Spaces operational budget, as requested by Council at the previous workshop. It outlines the additional maintenance activities driving the proposed increase in maintenance funding and summarises current and proposed capital investment across all Open Spaces areas. The report is intended as pre-reading for the workshop, where further detail will be provided through the presentation.

PROPOSED WORKSHOP OUTCOMES/DIRECTIONS

That Council note and discuss matters arising from the staff presentation on the Open Spaces AMP.

1. **That Council provides direction on the proposed maintenance budget and capital program for the parks and reserves**

2. **That Council provides direction on the insurance approach for playgrounds.**

3. **That Council provides direction on the renewal approach funding for playgrounds**

REPORT

1 Background

The Draft Open Spaces Activity Management Plan (AMP) proposes continuing to provide parks, reserves, playgrounds, sportsgrounds, campgrounds, cemeteries and public conveniences across the Clutha District. These services remain among Council's most visible and valued activities, supporting community wellbeing, recreation, visitor experiences and local identity.

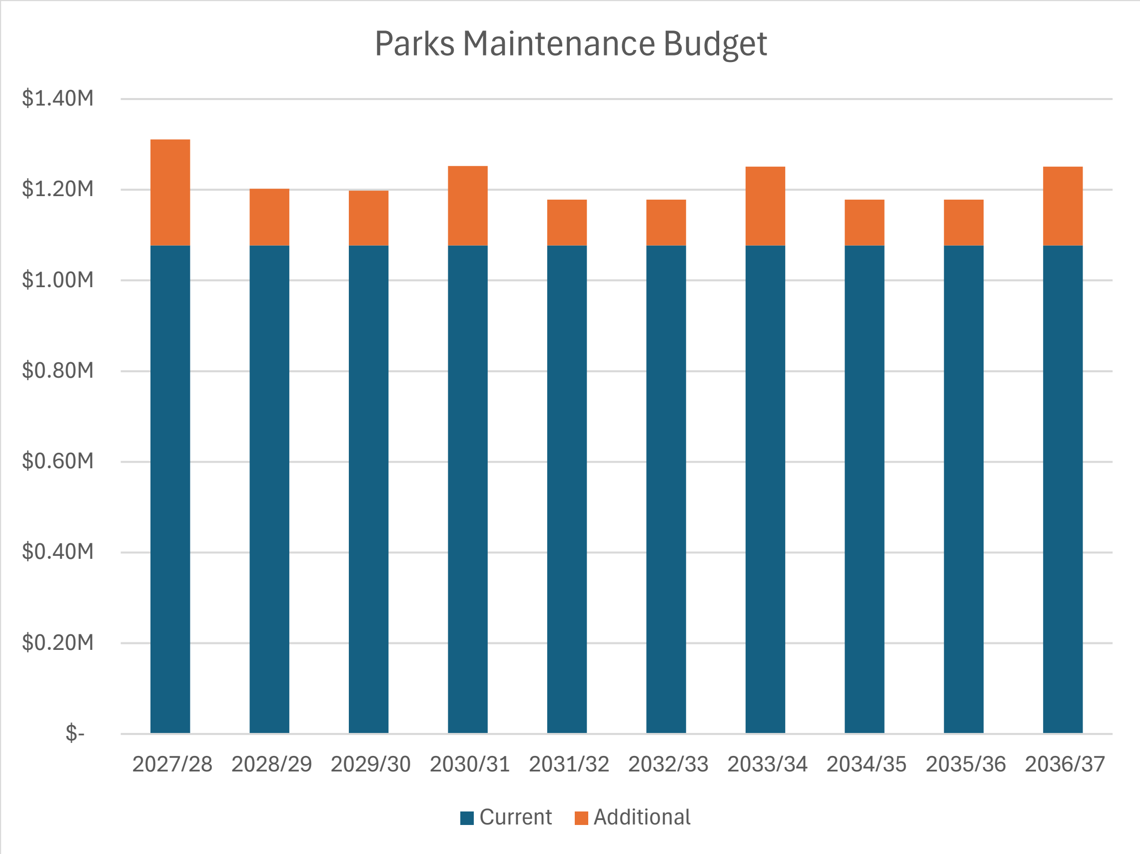
The AMP identifies several areas where increased investment is proposed to maintain existing service levels, address asset condition issues, meet regulatory expectations and manage identified risks. At the first workshop, Council asked staff to provide further detail on the proposed operational and capital budgets for Parks and Reserves. Staff have since reviewed and optimised the budget, with the revised proposal presented in this report and to be discussed further during the workshop presentation.

2 Maintenance Budgets

Operational budgets are based on an assessment of recent actual costs (adjusted for inflation) and incorporate anticipated changes in cost to maintain desired levels of service, improve asset condition and address risks. The budget only relates to the direct cost of maintaining open spaces. Other costs such as overheads are not included and will be considered once they are confirmed as part of the Long Term Plan (LTP) budgeting process.

Parks

The revised proposed Maintenance budget for the 10 Year LTP for Parks is shown below. The budget reflects present day (2026/27) costs and is not inflated. Details of additional activities are provided in Appendix A.

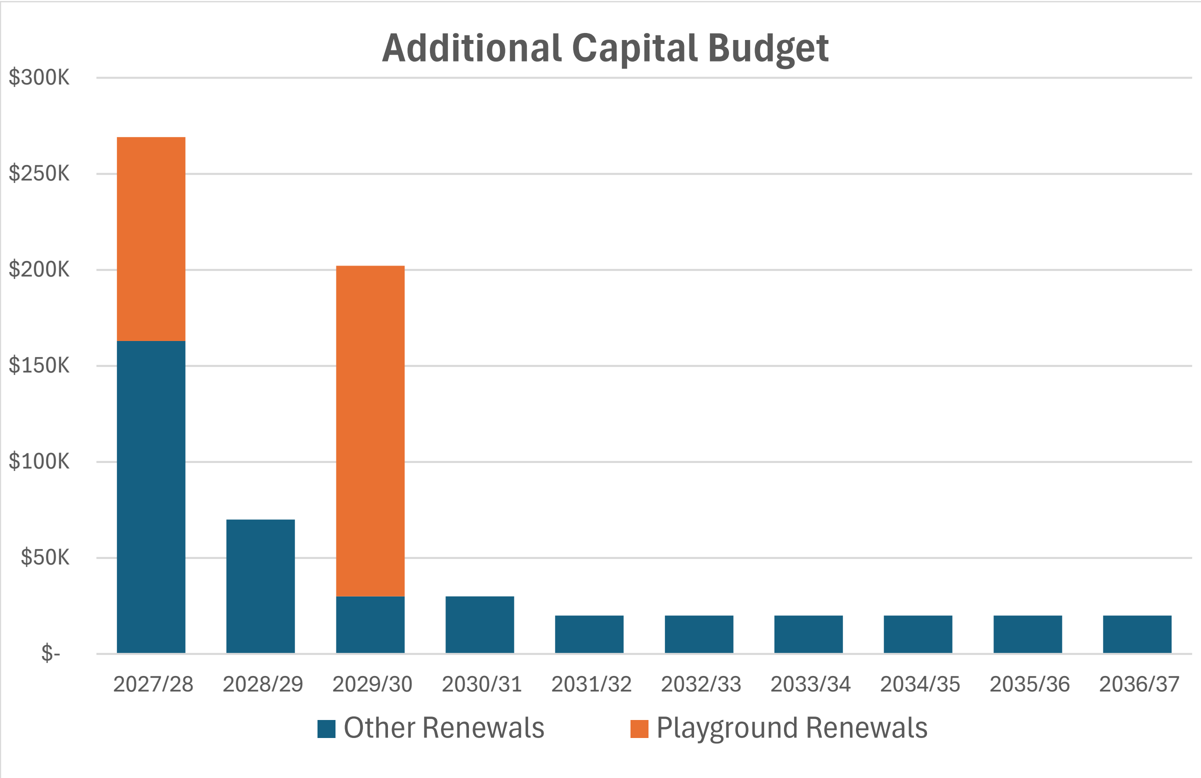


3 Capital and One-off Activities

Current capital projects from the 2024–34 LTP budget are outlined below. Council may choose to adjust the timing or budget for these projects or discontinue any of them.

Name	27/28	28/29	29/30	30/31	31/32	32/33	33/34	Comment
Kaka Point campground renewals	$ -	$ -	$15.9K	$ -	$ -	$ -	$17.0K	Campground is now leased – not needed
Balclutha Showgrounds Irrigation System	$108.9K	$ -	$ -	$ -	$ -	$ -	$ -	Setup for summer watering
Black Gully (Heriot)	$130.7K	$ -	$ -	$ -	$ -	$ -	$ -	Toilet Replacement. Toilet in good condition – not needed
New - Public Conveniences Renewals	$32.7K	$33.3K	$34.0K	$34.6K	$35.2K	$35.8K	$36.4K	
Whiskey Gully Domain toilet	$44.3K	$ -	$ -	$ -	$ -	$ -	$ -	Toilet Renewal. Toilet in good condition – not needed
Total	$316.5K	$33.3K	$49.9K	$34.6K	$35.2K	$35.8K	$53.4K	

Additional capital and one-off costs are proposed for the 2027-37 LTP. The summary of the proposed work is shown in the chart below. The summary separates playground renewals from the rest of the other renewal work as council may want to consider different approaches to the renewal work and funding. The detailed work programme including cost and timelines is presented in detail in Appendix B.



4 Insurance and Renewals Funding for Playgrounds

Discussion on insurance and renewal funding for playgrounds will be facilitated through the PowerPoint presentation during the workshop.

DISCUSSION

1. Is council supportive of the capital program proposed in the Draft Open Spaces AMP?
2. Are there any projects under the current approved programme that council would want to discontinue?
3. Does council want to revisit the insurance approach for playgrounds? Which approach should staff pursue?
4. Does council want to define/select a preferred funding model for playground renewal, or will council consider renewal needs on a case-by-case basis?

ATTACHMENTS

1. Appendix A – Detailed Maintenance Budget
2. Appendix B – Additional Capital Work

Cost	Location	Site	Type	Description	Priority	Risk register reference	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37
Additional	Parks Rural	Stirling Playground	Routine Maintenance	Bark top up	1	Line 35	$ 2,000	$ -	$ -	$ 2,000	$ -	$ -	$ 2,000	$ -	$ -	$ 2,000
Additional	Parks Rural	Benhar Playground	Routine Maintenance	Pea Gravel top up	1	Line 102	$ 1,000	$ -	$ -	$ 1,000	$ -	$ -	$ 1,000	$ -	$ -	$ 1,000
Additional	Parks Rural	Pounawea Playground	Routine Maintenance	Pea Gravel top up	1	Line 79	$ 7,000	$ -	$ -	$ 7,000	$ -	$ -	$ 7,000	$ -	$ -	$ 7,000
Additional	Parks Rural	Livingstonia Park Playground	Routine Maintenance	Pea Gravel top up	1	Line 84	$ 3,000	$ -	$ -	$ 3,000	$ -	$ -	$ 3,000	$ -	$ -	$ 3,000
Additional	Parks Rural	Toko Mouth	Routine Maintenance	Pea Gravel top up	1	Line 84	$ 2,500	$ -	$ -	$ 2,500	$ -	$ -	$ 2,500	$ -	$ -	$ 2,500
Additional	Parks Rural	Papatowai Playground	Routine Maintenance	Bark Top Up	1	Line 76	$ 4,500	$ -	$ -	$ 4,500	$ -	$ -	$ 4,500	$ -	$ -	$ 4,500
Additional	Parks Rural	Knarston Park	Routine Maintenance	Knarston park - pot holes	1	Line 74	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000
Additional	Parks Rural	Taieri Mouth	Routine Maintenance	Rabbit control	2	line 44	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000
Additional	Parks Kaka Point	Foreshore Playground	Routine Maintenance	Maintain landscaping at the new foreshore playground	2	line 38	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000
Additional	Parks Kaka Point	Kaka Point Tarata St	Routine Maintenance	Pea Gravel top up	1	line 71	$ 11,000	$ -	$ -	$ 8,000	$ -	$ -	$ 8,000	$ -	$ -	$ 8,000
Additional	Parks Tapanui	Tapanui Bushyhill Playground	Routine Maintenance	Bark/pea gravel top up	1	line 78	$ 11,000	$ -	$ -	$ 8,000	$ -	$ -	$ 8,000	$ -	$ -	$ 8,000
Additional	Parks Waihola	Waihola - Pest control	Routine Maintenance	Rabbit control	2	line 52	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000
Additional	Parks Waihola	Waihola	Routine Maintenance	Roading potholes - Waihola Domain	1	line 54	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000
Additional	Parks Waihola	Waihola	Non-routine Maintenance	Removal of damaged willow	2	line 51	$ 8,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Additional	Parks Lawrence	Lawrence	Routine Maintenance	Main street drink fountain and furniture upkeep	3	line 41	$ 1,000	$ -	$ -	$ 1,000	$ -	$ -	$ 1,000	$ -	$ -	$ 1,000
Additional	Parks Lawrence	Lawrence	Non-routine Maintenance	Control wasp infestations on berms	2	line 42	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000
Additional	Parks Lawrence	Lawrence	Routine Maintenance	Roading potholes - Lawrence	1	line 43	$ 3,800	$ 3,800	$ 3,800	$ 3,800	$ 3,800	$ 3,800	$ 3,800	$ 3,800	$ 3,800	$ 3,800
Additional	Parks Owaka	Owaka Playground	Routine Maintenance	Bark/Pea gravel top up	1	line 78	$ 7,250	$ 7,250	$ 7,250	$ 7,250	$ 7,250	$ 7,250	$ 7,250	$ 7,250	$ 7,250	$ 7,250
Additional	Parks Balclutha	Pound Maintenance	Routine Maintenance	Maintenance not include in routine maintenance, mowing lawn and weedeating.	2	line 9	$ 460	$ 460	$ 460	$ 460	$ 460	$ 460	$ 460	$ 460	$ 460	$ 460
Additional	Parks Balclutha	Rosebank Subdivison	Routine Maintenance	Maintenance of the extra garden in the Rosebank subdivison	3	line 31	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000
Additional	Parks Balclutha	Plantation heights	Routine Maintenance	Controlling invasive plants, and maintaining area	2	line 10	$ 60,000	$ 40,000	$ 40,000	$ 20,000	$ 20,000	$ 20,000	$ 20,000	$ 20,000	$ 20,000	$ 20,000
Additional	Parks Balclutha	Riverside reseve	Routine Maintenance	Replacement of fences/fixing fences	1	line 22	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000
Additional	Parks Balclutha	All Balclutha Parks	Routine Maintenance	Bark/pea gravel top up	1	line 28	$ 23,000	$ -	$ -	$ 23,000	$ -	$ -	$ 23,000	$ -	$ -	$ 23,000
Additional	Parks Kaitangata	Old Cemetery Reserve Playground	Routine Maintenance	Bark/mulch needs replaced	1	line 34	$ 1,500	$ -	$ -	$ 1,500	$ -	$ -	$ -	$ -	$ -	$ -
Additional	Parks Kaitangata	Victoria Park playground	Routine Maintenance	Pea gravel top up	1	line 34	$ 4,500	$ -	$ -	$ 4,500	$ -	$ -	$ 4,500	$ -	$ -	$ 4,500
Additional	Parks Milton	Tokoiti pedestrian walkway	Routine Maintenance	Operations -maintaning new planting, spraying the pathway.	2	line 56	$ 14,400	$ 14,400	$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Additional	Parks Milton	Destination toilets	Routine Maintenance	Maintain new landscaping	3	line 58	$ 10,400	$ 10,400	$ 10,400	$ 10,400	$ 10,400	$ 10,400	$ 10,400	$ 10,400	$ 10,400	$ 10,400
Additional	Parks Milton	Moore Park Playground	Routine Maintenance	Flying Fox annual maintenance to meet NZ playground standards	1	line 60	$ 3,000	$ 3,000	$ 3,000	$ 3,000	$ 3,000	$ 3,000	$ 3,000	$ 3,000	$ 3,000	$ 3,000
Additional	Parks Milton	Milton Pool	Routine Maintenance	New landscaping needing to be maintained at new pool/library site	3	line 65	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Additional	Parks Milton	Dog Park	Routine Maintenance	Current level of service needs to be increased	3	line 66	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000	$ 6,000
Additional	Parks Milton	Moore Park	Routine Maintenance	Pump track bark needs topped up	1	line 64	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000
Additional	Parks Milton	Toko showgrounds	Routine Maintenance	Maintaining internal road and filling pot holes	1	line 67	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000
Additional	Parks Milton	Moore Park Playground	Routine Maintenance	Pea gravel top up	2	line 99	$ 4,000	$ -	$ -	$ 4,000	$ -	$ -	$ 4,000	$ -	$ -	$ 4,000
Additional	Parks Milton	Taylor Park Playground	Routine Maintenance	Bark top up	2	line 99	$ 1,000	$ -	$ -	$ 1,000	$ -	$ -	$ 1,000	$ -	$ -	$ 1,000
Additional	Parks Clinton	Clinton Playground	Routine Maintenance	Bark top up	1	line 32	$ 3,500	$ -	$ -	$ 3,500	$ -	$ -	$ 3,500	$ -	$ -	$ 3,500
Current	Parks Kaka Point	Routine Maintenance	Routine Maintenance		1		$ 18,882	$ 18,882	$ 18,882	$ 18,882	$ 18,882	$ 18,882	$ 18,882	$ 18,882	$ 18,882	$ 18,882
Current	Parks Kaka Point	Berm Maintenance	Routine Maintenance		1		$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291
Current	Parks Kaka Point	Reactive Maintenance	Non-routine Maintenance		1		$ 5,363	$ 5,363	$ 5,363	$ 5,363	$ 5,363	$ 5,363	$ 5,363	$ 5,363	$ 5,363	$ 5,363
Current	Parks Tapanui	Routine Maintenance	Routine Maintenance		1		$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412
Current	Parks Tapanui	Berm Maintenance	Routine Maintenance		1		$ 16,090	$ 16,090	$ 16,090	$ 16,090	$ 16,090	$ 16,090	$ 16,090	$ 16,090	$ 16,090	$ 16,090
Current	Parks Tapanui	Reactive Maintenance	Non-routine Maintenance		1		$ 10,658	$ 10,658	$ 10,658	$ 10,658	$ 10,658	$ 10,658	$ 10,658	$ 10,658	$ 10,658	$ 10,658
Current	Parks Waihola	Routine Maintenance	Routine Maintenance		1		$ 64,360	$ 64,360	$ 64,360	$ 64,360	$ 64,360	$ 64,360	$ 64,360	$ 64,360	$ 64,360	$ 64,360
Current	Parks Waihola	Reactive Maintenance	Non-routine Maintenance		1		$ 8,430	$ 8,430	$ 8,430	$ 8,430	$ 8,430	$ 8,430	$ 8,430	$ 8,430	$ 8,430	$ 8,430
Current	Parks Lawrence	Routine Maintenance	Routine Maintenance		1		$ 47,948	$ 47,948	$ 47,948	$ 47,948	$ 47,948	$ 47,948	$ 47,948	$ 47,948	$ 47,948	$ 47,948
Current	Parks Lawrence	Berm Maintenance	Routine Maintenance		1		$ 20,381	$ 20,381	$ 20,381	$ 20,381	$ 20,381	$ 20,381	$ 20,381	$ 20,381	$ 20,381	$ 20,381
Current	Parks Lawrence	Reactive Maintenance	Non-routine Maintenance		1		$ 20,970	$ 20,970	$ 20,970	$ 20,970	$ 20,970	$ 20,970	$ 20,970	$ 20,970	$ 20,970	$ 20,970
Current	Parks Owaka	Routine Maintenance	Routine Maintenance		1		$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412	$ 16,412
Current	Parks Owaka	Berm Maintenance	Routine Maintenance		1		$ 3,218	$ 3,218	$ 3,218	$ 3,218	$ 3,218	$ 3,218	$ 3,218	$ 3,218	$ 3,218	$ 3,218
Current	Parks Owaka	Reactive Maintenance	Non-routine Maintenance		1		$ 7,509	$ 7,509	$ 7,509	$ 7,509	$ 7,509	$ 7,509	$ 7,509	$ 7,509	$ 7,509	$ 7,509
Current	Parks Balclutha	Routine Maintenance	Routine Maintenance		1		$ 295,282	$ 295,282	$ 295,282	$ 295,282	$ 295,282	$ 295,282	$ 295,282	$ 295,282	$ 295,282	$ 295,282
Current	Parks Balclutha	Berm Maintenance	Routine Maintenance		1		$ 24,671	$ 24,671	$ 24,671	$ 24,671	$ 24,671	$ 24,671	$ 24,671	$ 24,671	$ 24,671	$ 24,671
Current	Parks Balclutha	Reactive Maintenance	Non-routine Maintenance		1		$ 106,662	$ 106,662	$ 106,662	$ 106,662	$ 106,662	$ 106,662	$ 106,662	$ 106,662	$ 106,662	$ 106,662
Current	Parks Kaitangata	Routine Maintenance	Routine Maintenance		1		$ 49,626	$ 49,626	$ 49,626	$ 49,626	$ 49,626	$ 49,626	$ 49,626	$ 49,626	$ 49,626	$ 49,626
Current	Parks Kaitangata	Berm Maintenance	Routine Maintenance		1		$ 21,453	$ 21,453	$ 21,453	$ 21,453	$ 21,453	$ 21,453	$ 21,453	$ 21,453	$ 21,453	$ 21,453
Current	Parks Kaitangata	Reactive Maintenance	Non-routine Maintenance		1		$ 11,799	$ 11,799	$ 11,799	$ 11,799	$ 11,799	$ 11,799	$ 11,799	$ 11,799	$ 11,799	$ 11,799
Current	Parks Milton	Routine Maintenance	Routine Maintenance		1		$ 79,440	$ 79,440	$ 79,440	$ 79,440	$ 79,440	$ 79,440	$ 79,440	$ 79,440	$ 79,440	$ 79,440
Current	Parks Milton	Berm Maintenance	Routine Maintenance		1		$ 8,581	$ 8,581	$ 8,581	$ 8,581	$ 8,581	$ 8,581	$ 8,581	$ 8,581	$ 8,581	$ 8,581
Current	Parks Milton	Reactive Maintenance	Non-routine Maintenance		1		$ 42,000	$ 42,000	$ 42,000	$ 42,000	$ 42,000	$ 42,000	$ 42,000	$ 42,000	$ 42,000	$ 42,000
Current	Parks Clinton	Routine Maintenance	Routine Maintenance		1		$ 15,586	$ 15,586	$ 15,586	$ 15,586	$ 15,586	$ 15,586	$ 15,586	$ 15,586	$ 15,586	$ 15,586
Current	Parks Clinton	Berm Maintenance	Routine Maintenance		1		$ 2,145	$ 2,145	$ 2,145	$ 2,145	$ 2,145	$ 2,145	$ 2,145	$ 2,145	$ 2,145	$ 2,145
Current	Parks Clinton	Reactive Maintenance	Non-routine Maintenance		1		$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291	$ 4,291
Current	Parks Rural	Routine Maintenance	Routine Maintenance		1		$ 109,735	$ 109,735	$ 109,735	$ 109,735	$ 109,735	$ 109,735	$ 109,735	$ 109,735	$ 109,735	$ 109,735
Current	Parks Rural	Berm Maintenance	Routine Maintenance		1		$ 18,235	$ 18,235	$ 18,235	$ 18,235	$ 18,235	$ 18,235	$ 18,235	$ 18,235	$ 18,235	$ 18,235
Current	Parks Rural	Reactive Maintenance	Non-routine Maintenance		1		$ 26,817	$ 26,817	$ 26,817	$ 26,817	$ 26,817	$ 26,817	$ 26,817	$ 26,817	$ 26,817	$ 26,817
Total							**$ 1,311,057.00**	**$ 1,202,557.00**	**$ 1,198,157.00**	**$ 1,252,657.00**	**$ 1,178,157.00**	**$ 1,178,157.00**	**$ 1,251,157.00**	**$ 1,178,157.00**	**$ 1,178,157.00**	**$ 1,251,157.00**

Location	Site	Description	Priority	Risk register reference	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37
Parks Rural	Papatowai Playground	Papatowai playground replacement	1	Line 75	$ 60.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Rural	Taieri Mouth	Livingstonia - pine trees will need to be removed	2	Line 46	$ 50.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Rural	Taieri mouth	Cemetery hedge -needs to be removed	2	line 47	$ 15.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Rural	Stirling Playground	Replacement of wooden fort playground	1	Line 80	$ -	$ -	$ 45.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Rural	All Rural Playgrounds	New NZ standard playground sign	1	line 100	$ 2.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Kaka Point	Kaka Point Tarata St	New NZ standard playground sign	1	line 70	$ 0.3K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Owaka	Owaka Playground	Owaka old Fort in playground -needs replaced	2	line 72	$ -	$ -	$ 50.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	Plantation heights, replanting	Replanting	1	line 11	$ -	$ 40.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	Gormack Street Playground	Replace slide	1	line 12	$ -	$ -	$ 10.2K	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	Lanark St Playground	Replace flying fox	1	line 13	$ -	$ -	$ 22.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	Lanark st Playground	Replace Fort	1	line13	$ -	$ -	$ 45.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	Naish Park - Duck pond	Cleaning and repairing infrastructure	1	line 14	$ 12.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	Naish Park	Reseal the driveway into Naish Park	2	line 15	$ 12.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	Main Street	Replace the permeable surface around main street trees with tree grates.	2	line 20	$ -	$ 10.0K	$ 10.0K	$ 10.0K	$ -	$ -	$ -	$ -	$ -	$ -
Parks Balclutha	All Balclutha Parks	New NZ standard playground sign	1	line 30	$ 2.3K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Kaitangata	All Kaitangata Parks	New NZ standard playground sign	1	line 36	$ 0.5K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Kaitangata	All Kaitangata Parks	Replacement of rubbish bins that are damaged or at end of life	2	line 35	$ 4.0K	$ -	`	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Milton	Moore Park	Replacement of flying fox surrounds -upgrade of fall zone	1	line 60	$ 20.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Milton	Moore Park	Roundabout needs replaced -entrapment issue not compliant with NZ playground standards	1	line 68	$ 20.0K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Milton	All Milton parks	New NZ standard playground sign	1	line 57	$ 0.5K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Parks Clinton	Clinton Playground	New NZ standard playground sign	1	line 33	$ 0.5K	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Districtwide Parks	Districtwide	Fence renewals	2		$ 20.0K	$ 20.0K	$ 20.0K	$ 20.0K	$ 20.0K	$ 20.0K	$ 20.0K	$ 20.0K	$ 20.0K	$ 20.0K
Cemeteries	Balclutha Lawn Cemetery	Reseal internal road	1	line 25	$ 50.0K									
Total					**$ 269.1K**	**$ 70.0K**	**$ 202.2K**	**$ 30.0K**	**$ 20.0K**	**$ 20.0K**	**$ 20.0K**	**$ 20.0K**	**$ 20.0K**	**$ 20.0K**

Long Term Plan 2027

Workshop Topic	Community-owned Facilities Funding
Workshop Date	17 September 2066
Session Number	5
Author	Mike Goldsmith – Community Services Group Manager
M-Files Ref	105516

SUMMARY

This report provides elected representatives with a proposal for an equitable long term funding mechanism for community-owned facilities, to be incorporated within the 2027/37 Long Term Plan. The proposed method is based on a range of factors, including feedback from the community-owned facilities which currently receive some level of Council funding.

PROPOSED WORKSHOP OUTCOMES/DIRECTIONS

That Council confirms / does not confirm the proposed mechanism for community-owned facilities operational funding.

That Council confirms / does not confirm key principles for an operational funding policy for community-owned facilities.

REPORT

1 Introduction

The session will be facilitated with the assistance of a PowerPoint presentation.

Background reading for this session is provided in:

Attachment A (Community facilities funding overview). This is reference material only and was previously provided to elected members at two previous workshops (10 December 2025 and 25 June 2026).

Attachment B (Community owned facilities survey responses). This shows the responses from the committees who responded to a request for financial information.

How Council *collects* funding for community facilities is excluded from this discussion and forms part of the rates review. Similarly, the report does not relate to one-off funding decisions for particular facilities requested through the Annual or Long Term Plan (e.g., for capital upgrades or renewal work).

2 Background

A Council workshop on 10 December 2025 presented an overview of community facilities in the Clutha District, and how much ratepayers contribute towards the operational costs of these facilities. The direction from Councillors was to develop an equitable long term funding mechanism for community-owned facilities during the LTP process.

On 25 June 2026, a workshop presented options which could be applied to Council funding for community-owned pools, as a test case for applying the previous direction. Direction was requested on the *level of funding* for community pools, and *how that funding should be distributed*. The direction from Councillors was to:

i. develop models based on … population and common line-item costs; and
ii. model different funding levels (higher and lower) to show how different distribution approaches would affect individual facilities.

Work was undertaken to model funding methods bases on common line-item costs, population, and as a percentage of capital value. However, none of these methods appear to provide suitable funding outcomes.

3 Community-owned Facility Survey

Following consultation with Community Services Dept Portfolio Heads, a survey was sent to all community-owned facilities which receive some level of Council funding. The survey responses are included as Attachment B. The survey asked the committees who operate these facilities to provide the following information:

i. Organisation details (name, contact details)
ii. Operating costs:
    - Total cost
    - Utility costs (electricity, rates and insurance)
    - Any other significant operating costs
    - Recent financial statements
iii. The level of operational funding they think Council should contribute towards their annual operating costs, and why they think that level of funding is reasonable.
iv. Any other relevant information.

4 Revised Method

PowerPoint slides will be used to present the results of the survey for the following groups:

i. Halls
ii. Pools
iii. Museums
iv. Recreation Centres
v. Visitor Centres
vi. Other facilities

Staff have proposed a moderated funding amount which would provide an equitable funding mechanism, based on the following information:

i. The level of operational funding requested
ii. The level of service provided by the facility (e.g., size, age, complexity of operation)
iii. Total operating costs
iv. Current grant funding for each facility.

The method used also considered the *total funding* currently provided to each type of facility (e.g., halls, pools) and attempted to keep the *total moderated funding amount* at a similar level. For example, Council allocated a total of $186,792 to community-owned pools in 2025/26, while the total moderated amount (using the above method) was $210,000.

The total amount allocated to each category can be amended at Council's discretion, and this would impact the amount allocated to each facility. The key principle behind the revised method is equitable long-term funding for all facilities, to be confirmed through the 2027/37 Long Term Plan. A calculator will be provided through the workshop; to enable elected representatives to model different funding levels to show how different distribution approaches would affect individual facilities.

ATTACHMENTS

A: Community facilities funding overview (December 2025)

B: Survey Results from Community Owned Facilities

Clutha District Council

Community facilities funding overview

Prepared by Mike Goldsmith[1] and Sharon Jenkinson[2]
Community Services Department, October 2025

"Community facilities are not just about buildings and space. They provide the place and the services that allow people to come together to meet, play, learn, share information, celebrate achievements and help each other. They are venues for arts, cultural, educational, recreational & leisure activities, provide accommodation for voluntary groups, and are important gathering points in civil defence emergencies. Accessible community facilities can play a critical part in strengthening districts by bringing people together."

GHC Consulting Ltd, 2020, *Review of community halls and grandstands in the Clutha District.*

Photo credits:
Top: NZ Geographic (link)
Bottom: TPOMA (link)

[1] Community Services Group Manager
[2] Finance and Policy Group Manager

Contents

1.0 Introduction

The following requests to review the way community facilities in the Clutha District are funded have been made through previous annual plan and long term plan processes:[3]

- *Community grants funding (general)*: grants and community-contract services funding will be reviewed as part of the development of the long term plan.
- *isite funding:* review of isite funding as part of the next review of the Revenue and Financing Policy.
- *Swimming Pools:* A review of operating grants and models for community swimming pools to ensure Council support of these pools is fair and equitable.
- *Visitor and Information Centres:* A review of funding for visitor and information centre services because of inconsistencies of grants from Council.
- *Museums:* A review to analyse how museums are funded, and to address the future development and financial needs of each museum facility to ensure there is fairness across the district.

As an initial step, this report provides an overview of *all* the community facilities which are funded by Council, as well as how much ratepayers across the district pay towards those facilities, and how that funding is distributed.

[3] Other reviews which are not directly related to this assessment, include working with the Tuapeka Aquatic Centre to review how to meet their future heating needs, and an assessment of means testing for access to community housing.

2.0 Community facilities in the Clutha District

2.1 Overview

For a district with a population of just 18,500 people, Clutha has a large and diverse range of community facilities. Many of these are older and may therefore require additional repairs or maintenance, but there has also been significant renewal work undertaken over the last decade, including the opening of Te Pou Ō Mata-Au in 2023 and the Tuapeka Aquatic Centre in 2016. Work to construct the new Bruce Community Facility will commence in 2026, and consultation is currently underway on a proposal to move the Tapanui Library into the adjacent Community Centre.

In 2024/25, Council owned or helped to fund 54 facilities across the district, including 26 halls/community centres, 12 pools, six museums, five libraries, four information centres, and the Cross Recreation Centre. Of these, 35 are community-owned with some level of Council support, and these facilities are generally well looked after and well-used by the local community.[4]

2.2 Where are they located?

The facilities which are owned by Council or receive some level of funding from Council are shown in Table 1. They have been grouped by facility type, and by the Community Service Rating Area (see Figure 1) within which they sit. The Lower Clutha area has the most facilities (18), followed by Lawrence-Tuapeka and Bruce (both with 9), West Otago (8), The Catlins (6) and Clinton (4).

2.3 Community facility usage

Community facilities in Clutha are generally well-used and supported. Usage data for Council facilities such as pools and libraries has previously been reported to Council's standing committees on a regular basis. Other usage information, particularly for community-owned assets is more anecdotal, with no comprehensive database covering all facilities.

Given the distributed, rural nature of the district, it is likely that many residents will not just use their own local facilities, but from time to time will also use facilities in other towns, as well as facilities which are outside the district – e.g. in Gore or Dunedin. Sports teams and schools from smaller towns such as Tapanui, Lawrence and Owaka regularly travel to events and competitions, sometimes on a weekly basis. Similarly, Clutha residents can access library facilities across the district, not just their local library.

In addition, personal preference will mean that Clutha residents will access some types of facility more than others – e.g., some may choose libraries, information centres or museums, while others may prefer sporting facilities such as pools or the Cross Recreation Centre. The overall benefit that residents get from the available range of facilities depends on how often they use, and how well they support those facilities.

Although Council reserves, sports fields and playgrounds are also key community facilities, they are not assessed as part of this report. However, it is noted that many of the facilities listed in Table 1 are located on Council-administered reserves which may also be maintained under Council's greenspace contract.

[4] It is noted that there are other facilities which are not currently funded by Council – e.g. Toko Mouth Hall. Council generally is not involved in the operation or funding of these, and they are outside the scope of this report.

Figure 1 Map showing the extent of Community Service Rating Areas

Table 1 Community Facilities which receive some level of funding from Council

Community Service Rating Area	District Pools	Community-owned Pools	Recreation Centres	Libraries	Council Information Centres	Community-owned Information Centres	Museums	Council Halls	Community-owned Halls/Community Centres
West Otago (8 facilities)		• West Otago • Heriot		• Tapanui			• West Otago Vintage Museum		• Crookston • Heriot & Districts • Waikoikoi • West Otago CC
Lawrence-Tuapeka (9 facilities)		• Tuapeka Aquatic Centre • Waitahuna		• Lawrence		• Tuapeka Goldfields Museum	• Tuapeka Goldfields Museum	• Waitahuna	• Beaumont • Simpson Park Sporting Complex • Tuapeka West Hall
Bruce (9 facilities)	• Milton	• Taieri Beach		• Milton		• Milton Information Centre	• Bruce Museum Trust	• Moneymore • Waihola	• Milton Coronation • Taieri Mouth (Leitch)
Lower Clutha (18 facilities)	• Balclutha	• Kaitangata • Waiwera South • Clutha Valley	• Balclutha – Cross Recreation Centre	• Balclutha	• Balclutha i-site		• South Otago Historical Society • Kaitangata Museum	• Clutha Valley • Hillend • Kaka Point • Lovells Flat • Paretai	• Balclutha – TPOMA • Kaitangata CC • Romahapa • Waitepeka
Clinton (4 facilities)		• Clinton						• Waipahi • Waiwera South	• Clinton CC
Catlins (6 facilities)		• Owaka Swimming Baths		• Owaka		• Catlins Historical Society	• Catlins Historical Society	• Owaka	• Tahakopa
Total number of facilities	**2**	**10**	**1**	**5**	**1**	**3**	**6**	**11**	**15**

2.3 How are community facilities funded?

Clutha District property owners fund community facilities through their rates. There are two components – the Uniform Annual General Charge and the Community Facilities Targeted Rate, as described below:

Uniform Annual General Charge (UAGC): this is a rate set at a fixed amount across the entire district and which every rateable SUIP[5] pays. A portion of the UAGC is used to help fund community facilities.

Community Facilities Targeted Rate: Council has defined six Community Service Rating Areas, as shown in Figure 1. A targeted rate applies within each of these areas, and this is used to help fund local community facilities, together with the contribution from the UAGC. The rates are set as a fixed charge per SUIP, and residents in areas with more facilities (e.g., Lower Clutha) generally pay more than those in areas with fewer facilities (e.g., West Otago or The Catlins).

The total rates collected in the 2024/25 financial year for community facilities, from each of the six CSRA's, is shown in Table 2. In total, $5.3M was collected, with $2.7M through the Community Facilities Targeted Rate, and $2.6M through the UAGC. The largest rates take for community facilities was from the Lower Clutha area ($3.7M), followed by Bruce ($637K), Catlins ($352K), Lawrence-Tuapeka ($337K), West Otago ($264K), with just $47K collected from the Clinton area.

Table 2 Total rates collected via the UAGC and the Community Facilities Targeted Rate in 2024/25

Community Service Rating Area	Community Facilities Targeted Rate	UAGC	Total
West Otago	$24,441	$239,674	$264,115
Lawrence-Tuapeka	$134,894	$202,183	$337,077
Bruce	$347,457	$289,467	$637,414
Lower Clutha	$2,120,088	$1,572,209	$3,692,297
Clinton	$42,989	$4,137	$47,126
Catlins	$54,418	$298,103	$352,418
Total	**$2,724,194**	**$2,606,253**	**$5,330,447**

Table 3 shows the amount that each SUIP within each of the six Community Service Rating Areas paid towards community facilities in 2024/25. The UAGC component is fixed across the whole district. The total contribution towards community facilities varies across the district due to variations in the Community Facilities Targeted Rate, which varies from $231 in Lower Clutha to just $9.90 in West Otago.

[5] SUIP - Separately Used or Inhabited Part of a rating unit - includes any portion separately inhabited or used by the owner, or any portion separately inhabited or used by person/s other than the owner who has the right to use or inhabit that portion by virtue of a tenancy, lease, licence or other agreement.

Table 3 Rates collected from each SUIP for community facilities in the 2024/25 year

Community Service Rating Area	Community Facilities Targeted Rate	UAGC	Total
West Otago	$9.90	$358.41	$368.32
Lawrence-Tuapeka	$72.29	$358.41	$430.70
Bruce	$63.22	$358.41	$421.63
Lower Clutha	$231.10	$358.41	$589.51
Clinton	$35.12	$358.41	$393.53
Catlins	$28.35	$358.41	$386.76

2.3 How is community facilities funding distributed?

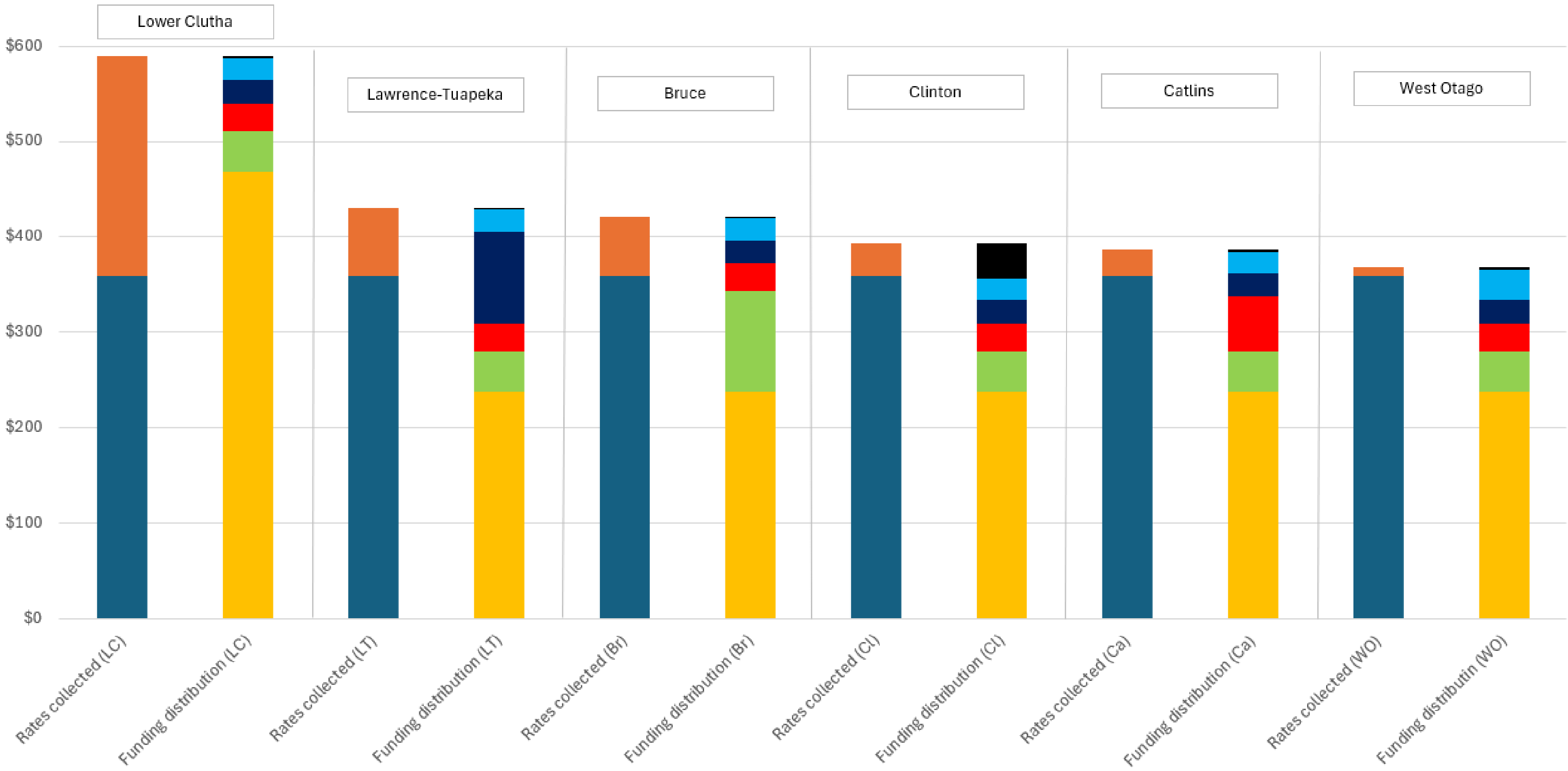
The way that community facilities funding is collected from, and also distributed across each of the six Community Service Rating Areas is summarised in Figure 2. There are two bars shown for each area:

1. The first (left) bar shows the rates collected from each SUIP for each area, using the values shown in Table 3. The blue section represents the UAGC component while the orange section represents the targeted rate.
2. The second bar shows how that rate funding is distributed. Some is spent locally within that area, and some is spent on facilities in other areas.

Two examples are provided below.

1. *Lower Clutha*. Each SUIP in this area pays $589.51 toward community facilities. Of this, $469 is spent in the Lower Clutha Area, with the rest spread across the other areas as follows: Bruce - $41.88, Catlins - $29.38, Lawrence-Tuapeka - $24.35, West Otago - $22.75, and Clinton - $2.31.
2. *Catlins*. Each SUIP in this area pays $386.76 towards community facilities. Of this, $57.72 is spent in The Catlins Area, with the rest spread across the other areas as follows: Lower Clutha - $237.74, Bruce - $41.88, Lawrence-Tuapeka - $24.35, West Otago - $22.75, and Clinton - $2.31.

Figure 2 shows that, for each rating area, the amount collected through the Targeted Rate is less than what is actually spent on community facilities within that area. This means that there is also a contribution from the UAGC rating component towards community facilities in each area. This funding method means that every ratepayer makes some contribution to all facilities in the district, while funding collected 'locally' within specific areas is also available to support local facilities.



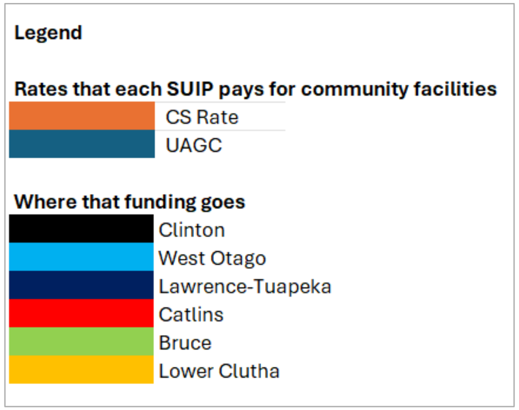


Figure 2 Graph showing the total rates take per SUIP for community facilities (left side) and how that funding is distributed (right side), for each of the six Community Service Rating Areas.

3.0 Funding for different types of community facilities

As noted above, a range of reviews have previously been requested by elected representatives. This section provides baseline information about the funding allocated to different types of community facilities in the 2024/25 year, with a focus on the areas where specific review work has been requested (pools, museums, information centres).

The total funding amounts for each type of community facility is shown in Table 4, and a more comprehensive table showing the amounts allocated to each facility in 2024/25 is included as Attachment A. It is noted that the $5.3M spent on community facilities in 2024/25 was 6% of the total Council expenditure of $88.9M for the year.

Table 4 Total Council funding for each type of community facility in the 2024/25 year

Activity	Council funding, 2024/25	Percent of the total community facilities funding	Percent of the total Council budget
Libraries	$2,185,627	41.0%	2.5%
Council-owned pools	$1,447,630	27.2%	1.6%
Community-owned halls	$754,631	14.2%	0.9%
Council Information Centres (isite)	$322,460	6.1%	0.4%
Cross Recreation Centre	$227,899	4.3%	0.3%
Council-owned halls	$149,284	2.8%	0.2%
Community Information Centres	$99,098	1.9%	0.1%
Community-owned pools	$85,064	1.6%	0.1%
Museums	$58,754	1.1%	<0.1%
Total	$5,330,447	100%	6%

3.1 Community-owned pools

Council allocated $85,064 to support community-owned pools in 2024/25, which was 1.6% of the total Council funding towards community facilities for that year. Table 5 shows how that funding support was distributed across the six Community Service Rating Areas. The Lawrence-Tuapeka area received the most funding ($40,933, or 48% of the total), while the Bruce area received $711, or 1% of the total funding for community-owned pools.

Table 5 Council funding for community pools in the 2024/25 year

Community Service Rating Area	Community pools funded	Council funding, 2024/25	Percent of the total community pools funding
Lawrence-Tuapeka	• Tuapeka Aquatic Centre • Waitahuna	$40,933	48%
Lower Clutha	• Kaitangata • Waiwera South • Clutha Valley	$17,714	21%
Catlins	• Owaka	$12,530	15%
West Otago	• West Otago • Heriot	$9,039	11%
Clinton	• Clinton	$4,137	5%
Bruce	• Taieri Beach	$711	1%
Total	**10 pools**	**$85,064**	**100%**

Council also allocated $1.45M to the two Council-owned pools in 2024/25, which was 27.2% of the total Council funding towards community facilities for that year (Table 4).

3.2 Museums

Council allocated $58,754 to support museums in 2024/25, which was 1.1% of the total Council funding towards community facilities for that year. Table 6 shows how that funding support was distributed across the Community Service Rating Areas. The Catlins area received the most funding ($16,722, or 28% of the total). The funding allocation across the six museums is decided by the Combined Museums Group, rather than Council.

Table 6 Council funding for museums in the 2024/25 year

Community Service Rating Area	Museums funded	Council funding, 2024/25	Percent of the total Museums funding
Catlins	• Catlins Historical Society	$16,722	28%
Lower Clutha	• South Otago Historical Society • Kaitangata Museum	$14,963	25%
Lawrence-Tuapeka	• Tuapeka-Goldfields Museum	$11,298	19%
West Otago	• West Otago Vintage Museum	$9,398	16%
Bruce	• Bruce Museum Trust	$6,373	11%
Clinton	• N/A	$0	0%
Total	**6 Museums**	**$58,754**	**100%**

3.2 Information Centres

Council allocated $99,098 to support community-owned information centres in 2024/25, which was 1.9% of the total Council funding towards community facilities for that year. Table 7 shows how that funding support was distributed. The Lawrence area received the most funding ($65,000 or 66% of the total).

Table 7 Council funding for community-owned information centres in the 2024/25 year

Community Service Rating Area	Information Centres funded	Council funding, 2024/25	Percent of the total Community Information Centre funding
Lawrence-Tuapeka	• Tuapeka-Goldfields Museum	$65,000	66%
Catlins	• Catlins Information Centre	$22,471	23%
Bruce	• Milton Historical Society	$11,627	12%
Lower Clutha	• N/A	$0	0%
West Otago	• N/A	$0	0%
Clinton	• N/A	$0	0%
Total	**3 Information Centres**	**$99,098**	**100%**

Council allocated an additional $322,460 towards the district isite information centre in Balclutha. This was 6.1% of the total Council funding towards community facilities in 2024/25.

4.0 Summary

Information has been collated to help inform future work to review the way community facilities are funded in the Clutha District. This includes a description of the various facilities that Council owns or supports financially, and a description of the method used to fund these facilities. Key findings from this report include:

1. Council owns or helps fund 54 facilities, including halls, community centres, pools, museums, libraries, information centres, and the Cross Recreation Centre.
2. The Lower Clutha Community Service Rating Area (CSRA) has 18 facilities, Lawrence-Tuapeka and Bruce both have nine, West Otago has eight, The Catlins has six and Clinton has four.
3. Clutha District residents can access community facilities both within their local area, across the wider district, and outside of the district.
4. Personal preference means that people may access some types of facility more than others – e.g., some may be regular library users while others may prefer sporting facilities.
5. The overall benefit that residents get from the range of facilities available depends on how often they use those facilities.
6. Clutha District ratepayers contributed $5.3M towards community facilities in the 2024/25 year.
7. Ratepayers in the Lower Clutha CSRA pay the most for facilities ($589), while other five areas pay between $368 and $430.
8. Every ratepayer makes some contribution to all facilities in the district, while funding collected within each CSRA is also available to support local facilities.
9. Information about the level and distribution of funding which was allocated to different types of community facilities in 2024/25 has also been provided.
10. This shows that the Lawrence-Tuapeka area received the greatest proportion of Council funding allocated to community-owned pools and information centres, while The Catlins received the greatest proportion of funding allocated to museums.

Attachment 1 – Funding allocation for each community facility

The table also shows the funding that Council provides to each type of facility, as well as the total funding Council provides for each Community Service Rating Area.

CSRA	District Pools	CS Rate	Community-owned Pools	CS Rate	UAGC	Recreation Centres	CS Rate	Libraries	UAGC	Council Information Centres	UAGC	Community-owned Information	CS Rate	Museums	UAGC	Council Halls	CS Rate	Community-owned Halls/Community Centres	CS Rate	Total funding by CSRA (2024/25)
West Otago (8 facilities)			West Otago		7,240			Tapanui	221,237					West Otago Vintage Museum	9,398			Crookston	534	
			Heriot		1,799													Heriot & Districts	8,853	
																		Waikoikoi	2,000	
																		West Otago CC	13,054	$ 264,115
Lawrence-Tuapeka (11 facilities)			Tuapeka Aquatic Centre	40,222				Lawrence	190,174			Tuapeka Goldfields Museum	65,000	Tuapeka Goldfields Museum	11,298	Waitahuna	20,562	Beaumont	1,139	
			Waitahuna		711													Simpson Park Sporting Complex	6,832	
																		Tuapeka West Hall	1,139	$ 337,077
Bruce (9 facilities)	Milton	296,092	Taieri Beach		711			Milton	282,863			Milton Information Centre	11,627	Bruce Museum Trust	6,373	Moneymore	8,216	Milton Coronation	19,305	
																Waihola	11,088	Taieri Mouth (Leitch)	1,139	$ 637,414
Lower Clutha (19 facilities)	Balclutha	1,151,538	Kaitangata	5,430	7,000	Cross Recreation Centre	227,899	Balclutha	1,222,502	Balclutha i-site	322,460			South Otago Historical Society	9,590	Clutha Valley	23,566	Balclutha – TPOMA	642,532	
			Waiwera South		1,171									Kaitangata Museum	5,373	Hillend	12,311	Kaitangata CC	24,592	
																Kaka Point	13,817	Romahapa	1,900	
			Clutha Valley		4,113											Lovells Flat	7,227	Waitepeka	1,139	
																Paretai	8,137			$ 3,692,297
Clinton (4 facilities)			Clinton		4,137											Waipahi	7,124	Clinton CC	28,195	
																Waiwera South	7,670			$ 47,126
Catlins (6 facilities)			Owaka Swimming Baths		12,530			Owaka	268,851			Catlins Historical	22,471	Catlins Historical Society	16,722	Owaka	29,566	Tahakopa	2,278	$ 352,418
Total funding by category (24/25)	**$**	**1,447,630**	**$**	**45,652**	**39,412**	**$**	**227,899**	**$**	**2,185,627**	**$**	**322,460**	**$**	**99,098**	**$**	**58,754**	**$**	**149,284**	**$**	**754,631**	**$ 5,330,447**

Community Owned Facilities Funding

Workshop Topic	Community-owned Facilities Funding
Workshop Date	17 September 2066
Session Number	04 B
Author	Mike Goldsmith – Community Services Group Manager
M-Files Ref	1057615

ATTACHMENTS

B: Survey Results from Community Owned Facilities

- Halls
- Pools
- Museums
- Recreation Centre
- Te Pou Ō Mata Au | Clutha District War Memorial & Community Centre

Hall Surveys

- Beaumont Hall
- Clinton Community Hall
- Crookston Hall
- Heriot & Districts Community Centre
- Kaitangata Community Centre
- Leitch Memorial Hall
- Milton Corronation Hall
- Romahapa Hall
- Tahakopa Hall
- Tuapeka West Community Centre
- Waikoikoi Public Hall – Please note no Survey was provided
- Waitepeka/ Puerua Public Hall Society
- West Otago Community Centre

Hi Sonia

I was unable to open the link to the survey document.

Attached are the accounts for the Beaumont Hall as requested, showing your operations grant in the income column.

- The operating costs last financial year were $2205.10 for power/gas/insurance.
- Septic tank maintenance could be budgeted at say $100 per year. We gave it a bit of a tidy up last year and need to spend more on regular maintenance moving forward.
- Hall maintenance for pest control (rats, mice cluster flies), cleaning lichen, mould removal etc a between $600 and $1000 per year.

The hall's electricity and plumbing costs, up until April 2026, were off set because it was a shared system between the Hall, School, and a neighbouring property. The costs for maintaining this system we divided three ways. This worked well for many decades, however due to a change in circumstances this is no longer in operation and the costs for maintaining the electricity and the plumbing will now be met only by the Hall.

This being the case, we could say the costs for keeping the hall's doors open with a minimum amount of maintenance would be around $2800 to $3000 per year.

Other information of note

The Beaumont Community has invested, with volunteer labour, in some remediation work over the last five years, with our toilets, tanks (water and sewerage) and pumps in good working order. The kitchen is functional with a good Zip and Oven, working fridge and crockery/cutlery. It is watertight. From a community resilience perspective we believe it is a worthwhile asset, despite it not getting a lot of use.

If the Council decides to reduce our funding, this will seriously compromise our ability to maintain the hall at its current standard, forcing a re-think of our current plan to keep the building open and functional for the occasional use and for future generations or community resilience purposes.

The Beaumont Hall holds a small, curated collection of local artefacts and taonga collected from local families over many decades.

Further potential abandonment of the hall has its own issues. As the land is not owned by the Community, and the ownership of the building (legally) is unclear, with no current legal entity with clear ownership rights, removal or demolition of the building is likely to throw up some issues that would need to be worked through and may be expensive in its own right.

Please feel free to let me know if I can help you any further with this project.

Kind regards

Anna Mickell

Secretary/Treasurer

Beaumont Community Group

SURVEY – Community Funding for Community Facilities

1. Facility name
CLINTON COMMUNITY CENTRE SOCIETY INC
2. Contact person
JOY CARRUTHERS
3. Email address
a.joy.carruthers@gmail.com
4. What was the total cost to operate your facility for the most recent financial year?
$54,730 – Jan 2025 to Dec 2025
5. What were the electricity costs for your facility for the most recent financial year?
$5,590
6. What was the cost of rates for your facility for the most recent financial year?
Usually about $1,700 – not included this year due to a cut-off issue.
7. What were your insurance costs (if any) for the most recent financial year?
$20,355
8. Are there any significant operating costs unique to your facility?
Fire Alarm monitoring Cleaning Building & Plant repairs Electricity Insurance Rates Depreciation

9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
We need the level of operational funding we are currently receiving, $28,195, as appropriated from the Clinton district ratepayers for the year 2024/2025.
11. Why do you think this level of Council funding is reasonable?
This amount funded from the ratepayers of the Clinton district is reasonable because it goes towards our current operating and fixed costs. This level enables us to provide a great, well-kept community asset which is reasonably priced for anyone in our community to hire and come together in.
12. Is there anything else you would like Council to consider in relation to this review?
In 2004 the Society took ownership of the Clinton Community Centre and became responsible for maintenance and upkeep in order to provide an asset for the use and benefit of the residents of the Clinton area. The Committee carried out extensive fundraising to update and refurbish the Centre. We have spent $785,698 on building refurbishment and plant and equipment up to December 2025. This included building a large caterer's kitchen, storage area, toilets, a large meeting room and refurbishing a smaller meeting room. And we are currently raising funds for further work including a new heating system after the boiler failed. We work hard to make sure it is available to all people wishing to hire it at very reasonable rates. The hall is available for all community functions such as the ANZAC day service, Young Farmer's fundraisers, school events, indoor bowls, weddings and funerals. With the option of the two extra meeting rooms we can cater for any sized groups. Including exercise classes, district dinners, Lion's dinners, training groups, special interest groups. We also have facilities for Plunket services. The current committee still contains many of the same members from 2004. We are a dedicated group of people who volunteer many hours and are committed to providing a great facility for residents of the Clinton area and future proofing it for generations to come. We pride ourselves on providing and maintaining a fantastic asset for the use of our community.

View results

Respondent

11 Anonymous

1208:50
Time to complete

About your organisation

1. Facility name *

Crookston Hall

2. Contact person *

Vanessa Stewart

3. Email address *

dvs01@xtra.co.nz

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$1794.74

5. What were the **electricity** costs for your facility for the most recent financial year? *

1600.02

6. What was the cost of **rates** for your facility for the most recent financial year? *

0

7. What were your **insurance** costs (if any) for the most recent financial year? *

$194.72

8. Are there any significant operating costs unique to your facility?

No, the main cost is the electricity. It would be nice if the Council could negotiate with Contact Energy to have some agreement with them regarding line charges for these facilities as that is what the big cost is and the GST on the electricity.

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

Fixed dollar amount would be simpler, but needs to be around $1000.00 considering $194 is for insurance costs.

10. Why do you think this level of Council funding is reasonable? *

The answer to question 9 could be less if we could somehow negotiate a better deal on the electricity cost. Especially the Line Charges and the GST. The funding also needs to adjust for inflation annually. A Flat dollar amount would be easier to administer. All Community Facilities will have different financial years so very hard to do it on a percentage of your total costs and very difficult to administer.

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

Our financial year end is on the 30 September so would rather send the more up-to-date figures then. Let me know if that is OK. Thanks Vanessa Stewart.

Hi Sonia

Our end of year is coming up in September and would be a lot more accurate and up-to-date Would it be OK to wait until then?

Regards

Vanessa

SURVEY – Community Funding for Community Facilities

1. Facility name
Heriot & Districts Community Centre
2. Contact person
Lynn Fletcher
3. Email address
herriotts@ispnz.co.nz or heriotcommunitycentre@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?
$23,578.82 + Gst
5. What were the **electricity** costs for your facility for the most recent financial year?
$3473.99 + GST
6. What was the cost of **rates** for your facility for the most recent financial year?
N/A
7. What were your **insurance** costs (if any) for the most recent financial year?
$11,939.06 + GST
8. Are there any significant operating costs unique to your facility?
No
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
Fixed dollar amount. $20,000

11. Why do you think this level of Council funding is reasonable?
With a fixed dollar amount we would know exactly how much council funding we are getting each year. This helps with our planning and financial forecasting. Stability would help us to move through maintenance plans we have in place.
12. Is there anything else you would like Council to consider in relation to this review?

Nothing new to add:
We are so grateful for any monies received from the CDC. Financially it helps our small committee so much. We have a fabulous facility, which is an integral part of our community, and just taking some of the monetary pressure off in the fixed costs, is invaluable. Especially so, in these times of continual inflationary pressure.

View results

Respondent

10 Anonymous

18:44

Time to complete

About your organisation

1. Facility name *

Kaitangata Community Centre

2. Contact person *

Di Uren

3. Email address *

kaiotees@gmail.com

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$17698.93

5. What were the **electricity** costs for your facility for the most recent financial year? *

$3212.41

6. What was the cost of **rates** for your facility for the most recent financial year? *

$863.20

7. What were your **insurance** costs (if any) for the most recent financial year? *

$6347.21

8. Are there any significant operating costs unique to your facility?

Cleaner & Cleaning supplies $540.40, Skip hire $600.00, Gardens & Lawns $977.50,
Tansleys Electrical/ Fire Monitoring $1134.75 but actual yearly cost is $1945.80

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

$21,500.00

10. Why do you think this level of Council funding is reasonable? *

$21,500 just covers our yearly expenditure, income from hiring the facility usually covers all our upgrades, repairs etc

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

We are a small Trust that works extremely hard to provide our community with a multi purpose facility. We believe that by maintaining our facility to a high standard, the community are more inclined to respect our venue. The Kaitangata Community Centre is a great asset for Kaitangata and the wider Clutha District

View results

Respondent

5 Anonymous

14:20
Time to complete

About your organisation

1. Facility name *

Taieri Mouth Amenities Society Incorporated

2. Contact person *

Maureen Seth

3. Email address *

TMAS01@outlook.co.nz

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$8,937.82

5. What were the **electricity** costs for your facility for the most recent financial year? *

$1,396.65

6. What was the cost of **rates** for your facility for the most recent financial year? *

N/A

7. What were your **insurance** costs (if any) for the most recent financial year? *

$5,124.69

8. Are there any significant operating costs unique to your facility?

As the Taieri Mouth Amenities Society owns the Leitch Memorial Community Hall, as such it costs the CDC very little in the way of funding, whereas other community halls owned by the CDC are fully funded by the ratepayers. Insurance is our biggest annual cost, but of course we are also continually having to maintain the building. This again is done without council support, unlike other community halls.

Taieri Mouth is a very small community, and we already ask our locals to contribute to so many projects in the area on top of the operational costs, including beautification and wellbeing projects. It has become very hard in the current economic environment to cover all our operational costs as well as our other projects.
Last year we received a grant from the Lotteries Commission to assist with our operational costs - we had asked for assistance for such costs for 4 years; however, we received sufficient for only one year.

Our operational costs have risen significantly over the past few years and of course for such a small community it then gets more and more difficult to ask the residents to dip into their pockets, so it would be really appreciated if Council would commit to assisting us each year for the total insurance costs or at least a fixed percentage of those costs so that we are able to better manage our fundraising for the remaining operational funds required.

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

A minimum of at least $5,000 to assist with our insurance, which is our highest cost.

10. Why do you think this level of Council funding is reasonable? *

We are a somewhat isolated community which was very evident during the windstorm in 2025 when we were without power on the south side of the bridge for four days - longer for people south of the township. As the power supply came on quite quickly on the north side of the bridge our residents were able to take advantage of the Hall for cooking, some refrigeration, charging of cell phones, and warmth, which, of course, resulted in a power bill somewhat higher than normal, which the Hall funds had to cover.

The Hall is an essential facility for the community as it supports various activities and functions that are critical for the wellbeing of a small community, but it is an expensive asset to maintain. Any support we can get from Council will be seen as a recognition that while we do the best we can to be self-sufficient, Council is also prepared to assist us.

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

We are very aware that costs have risen throughout the CDC area, but in the big picture we are asking for a very small amount. We are a resilient community, but over the years we have felt very isolated and "left out". It's time the CDC recognises we are part of the district and as important as any other community.

CLUTHA DISTRICT COUNCIL

To	Jill McIntosh, Person, Person
Cc	Person
Bcc	Person
Subject	

SURVEY – Community Funding for Community Facilities

1. Facility name
Milton Coronation Hall
2. Contact person
Jill McIntosh
3. Email address
jillcmcintosh@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?
$30802
5. What were the **electricity** costs for your facility for the most recent financial year?
$4037
6. What was the cost of **rates** for your facility for the most recent financial year?
$2371

7. What were your **insurance** costs (if any) for the most recent financial year?
$16212
8. Are there any significant operating costs unique to your facility?
-----
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
$19,090 (status quo)
11. Why do you think this level of Council funding is reasonable?
The income shown in the Hall Society's financial statement for year ended 30 June 2026 includes 7 months of rent (approximately $14000) from CDC for the lease of the two front rooms for temporary accommodation of the Library, a grant of $9200 from CDC towards renovating the back room, and grants from Otago Community Trust and Calder Stewart totalling $12600. The rent currently paid by Council will end later next year and the grants are one-offs, so without the annual Council funding, we could not cover our expenses, let alone continue the work to maintain the building. We will continue to seek grant money for that maintenance/improvements work where we can.

CLUTHA DISTRICT COUNCIL

12. Is there anything else you would like Council to consider in relation to this review?
With a building the age of the hall, there can be unexpected costs for repairs and that is often the case with our plumbing, and a roof that leaks at times. The committee is needing to spend a significant amount on repairing or possibly replacing the roof and will focus on gaining grant monies for this in the coming year but there may well be costs in the meantime as situations arise.

SURVEY – Community Funding for Community Facilities

1. Facility name
Romahapa Hall
2. Contact person
Kath Witt
3. Email address
Romahapahall@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?
1708
5. What were the **electricity** costs for your facility for the most recent financial year?
1364
6. What was the cost of **rates** for your facility for the most recent financial year?
140
7. What were your **insurance** costs (if any) for the most recent financial year?
n/a
8. Are there any significant operating costs unique to your facility?
n/a
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
The current level of $1900 meets our operating costs as well as a small amount for any maintenance or improvements required. We would like any changes to recognise inflation and rising cost of living.

11. Why do you think this level of Council funding is reasonable?
Receiving this funding from Council covers our operating costs. This allows our focus to be on ensuring our hall is well maintained and upgraded. In recent years we have re-roofed the hall, installed heat pumps and this year replaced windows with aluminum joinery all of which ensures the continued safe and warm use of the hall for our community without asking Council for any contribution towards these upgrades.
12. Is there anything else you would like Council to consider in relation to this review?
We would like to express our thanks to the Council for their continuing support, allowing us to keep our hall available for groups, our local school and our community.

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name	Tahakopa Memorial Hall
2. Contact person	Adraian Stott
3. Email address	adraian.stott@raywhite.com.
4. What was the **total** cost to operate your facility for the most recent financial year?	$8486.84 — installed heatpump - $5,000 donated towards this.
5. What were the **electricity** costs for your facility for the most recent financial year?	$1,003.91 — but will increase, as heatpump can be run during meetings as diesel heater too noisy
6. What was the cost of **rates** for your facility for the most recent financial year?	—
7. What were your **insurance** costs (if any) for the most recent financial year?	$399.43 — on Council Insurance Policy
8. Are there any significant operating costs unique to your facility?	No, but it's a community hall, that is hired out cheaply so it is used for community get-togethers, birthdays, funerals and was used by the School a lot before it closed. We have been fundraising towards new toilets — the only thing left to be upgraded.
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey	
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.	This funding was agreed to by the council, as all local ratepayer are charged for the Owaka Hall, but for local functions we use our own hall. There has been great community input to this hall, it's had everything upgraded except the toilets, a lot of community working bees. It's the hub of Tahakopa & surrounding areas
11. Why do you think this level of Council funding is reasonable?	

CLUTHA DISTRICT COUNCIL

I have explained why the council are giving the Hall so funds. Because the Hall is used by the community rate payer, whom are charged for the Owaka Hall. We recently had it hired by a youth group, that had young boys learning the skills of hunting. It is used by the Owaka & Toi Toi Lions for a social gathering yearly. To connect the rural areas. As I've said, this community has put hours into fund raising + working bees to upgrade the hall, so that it can be used by the future community. It was used a lot by the school.
The hall has been reroofed, had power upgraded, new kitchen, new windows, piles.
It needs a paint again on the outside & it badly needs the toilets upgraded. This cost keeps out growing us.
There will have to be another push of applying for grants to help us get that project done.
This hall is in good stead and has an active committee whom have been donating a lot of time to get this hall to this standard.

12. Is there anything else you would like Council to consider in relation to this review?

As a community, we need help to keep this hall running. It's an assert that has been saved over the years by a lot of people investing time & money to preserve. a hall that was built as a memorial of fallen soldiers over 100 years ago. Well done to all these people.

Thu, 23 Jul 2026

Hi Sonia

We appreciate what we have received, as it helps keep the power on.

If they could give us a wee bit extra, as these costs will be going up with the heat pump being

used instead of the diesel heater we were using, in which the farmers supplied the diesel for that

to operate.

That would be appreciated.

Regards

Adraian Stott

Tahaopa Hall Committee

Fri, 28 Aug 2026

Hi Sonia

We are happy to receive $2500 a year to help with the power connection.

Thanking you

Regards

Adraian Stott

Tahakopa Hall

Sent from my iPhone

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name

Tuapeka West Community Trust

2. Contact person

Emma Wightman

3. Email address

emmaitracey@hotmail.com

4. What was the **total** cost to operate your facility for the most recent financial year?

$8830

5. What were the **electricity** costs for your facility for the most recent financial year?

$1234

6. What was the cost of **rates** for your facility for the most recent financial year?

$1378

7. What were your **insurance** costs (if any) for the most recent financial year?

$1817

8. Are there any significant operating costs unique to your facility?

No.

9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey

10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.

We have always recieved an amount that covers our insurance. To continue this would be appreciated.

CLUTHA DISTRICT COUNCIL

11. Why do you think this level of Council funding is reasonable?

It covers one of our costs that is out of our control so enables us to continue our other activities confident we can manage or reduce other costs if neccessary.

12. Is there anything else you would like Council to consider in relation to this review?

No

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name
Waitepeka Puerua Public Hall Society Incorporated
2. Contact person
Michelle Forbes
3. Email address
icmmforbes@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?
$1439.01
5. What were the **electricity** costs for your facility for the most recent financial year?
$1265.68
6. What was the cost of **rates** for your facility for the most recent financial year?
NIL
7. What were your **insurance** costs (if any) for the most recent financial year?
$74.64
8. Are there any significant operating costs unique to your facility?
No
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey

CLUTHA DISTRICT COUNCIL

10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
$1138.63
11. Why do you think this level of Council funding is reasonable?
We are happy with the level of funding we already graciously receive from the Clutha District Council, as it covers most of our electricity costs, which is our main expense.

CLUTHA DISTRICT COUNCIL

12. Is there anything else you would like Council to consider in relation to this review?
No thank you.

SURVEY – Community Funding for Community Facilities

1. Facility name
West Otago Community Centre Society Incorporated
2. Contact person
Hans van der Linden
3. Email address
haneli@slingshot.co.nz
4. What was the **total** cost to operate your facility for the most recent financial year?
$53,269
5. What were the **electricity** costs for your facility for the most recent financial year?
$7,058
6. What was the cost of **rates** for your facility for the most recent financial year?
$1,522
7. What were your **insurance** costs (if any) for the most recent financial year?
$28,447 Historically our CDC Operational grant was double our Annual Insurance premiums. Now the premiums are 90% of this the grant and eroding further annually as premiums continue to escalate. i.e. when I started the Treasurers role some 26 years ago the annual premium was only $7,000.
8. Are there any significant operating costs unique to your facility?
Yes. With the pending redevelopment and enlargement of our facility, our historic annual balance sheet will undergo significant change. Also please note that our 2025 Financial Performance summary includes donations, a Clutha District Council Capital Grant and a Rabobank Grant all to be applied to our facility upgrade so should not be considered a normal income stream in our annual accounts.

9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
It would be nice to think that we could somehow Link our CDC Operational Grant to a percentage of our core operating expenditure which could be reviewed annually to ensure that it remains current.
11. Why do you think this level of Council funding is reasonable?
With the planned enlargement and rebuild of our facility, we anticipate a significantly increased Capital value of the combined complex. This will no doubt have an impact on insurance costs and a continued need to operate with a cash surplus to enable a cash reserve to accumulate for future capital and maintenance projects. Historically we have been able to squirrel away in the vicinity of $20K plus, annually, for this purpose. The dramatic escalation of insurance premiums over recent years has seen this number steadily eroded.
12. Is there anything else you would like Council to consider in relation to this review?
We believe that Council could perhaps drill down into the insurance detail of all our District's community owned and operated public facilities and investigate the option of a combined portfolio for Insurance purposes to determine if any significant savings can be made.

Pool – Surveys

- Clinton Pool
- Clutha Valley Pool
- Heriot School
- Kaitangata Pool
- Owaka Pool
- Tuapeka Aquatic Centre
- Waitahuna Pool
- Waiwera South Pool
- West Otago Pool

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name
Clinton Community Pool Inc.
2. Contact person
Lisa Anderson
3. Email address
clintonpools1974@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?
$37,413 → $7,307.01 heatpumps & other non running costs are not included → $6,262.28 included that was paid by school → $6,206.49 still owed to school not on accounts
5. What were the **electricity** costs for your facility for the most recent financial year?
$11,682.64
6. What was the cost of **rates** for your facility for the most recent financial year?
School covers rates and does not invoice us
7. What were your **insurance** costs (if any) for the most recent financial year?
School covers insurance and does not invoice us.
8. Are there any significant operating costs unique to your facility?
Chemicals and Staff We have large costs methodically updating aging equipment such as pumps, heatpumps, covers.
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
$10,000 or 25% of our yearly running costs
11. Why do you think this level of Council funding is reasonable?

CLUTHA DISTRICT COUNCIL

As $4137.37 grant out of $323,719 funding is just over 1% we seek a more reasonable amount of grant. Our volunteer committee spend a lot of time on the facility and fundraising.
School finds it harder and harder to cover running costs as swimming is only a small part of the curriculum, the committee try very hard to minimise this cost.

12. Is there anything else you would like Council to consider in relation to this review?

No

View results

Respondent

8 Anonymous

1515:49
Time to complete

About your organisation

1. Facility name *

Clutha Valley Primary School (Pool)

2. Contact person *

Val Ward

3. Email address *

principal@cluthavalley.school.nz

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$19,209.82 covering wages, expenses, electricity, insurance but not extra developments. This is for 1 October 2024 - 30 September 2025 for the 2024-2025 swimming season.

5. What were the **electricity** costs for your facility for the most recent financial year? *

$4,378.29

6. What was the cost of **rates** for your facility for the most recent financial year? *

Within the school rates

7. What were your **insurance** costs (if any) for the most recent financial year? *

1,263.67 covers the pool cover structure and the shed with the passive heating system which helps heat the pool.

8. Are there any significant operating costs unique to your facility?

$13,567.86 Wages and Maintenance

Although not operating costs, please note that there has been significant pool developments made in recent years including tiling, bathroom upgrades, modern key system and showers reinstated. These have been completed to future proof the facility and minimise ongoing maintenance and operating costs. $2,281.60 (Install fibre to school) not included in total expenses above. We are currently connecting this and fibre to the pool to run the new dosing system. It means that the new dosing can be controlled remotely.

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

$10,000

10. Why do you think this level of Council funding is reasonable? *

While operating costs keep creeping up each year (over $2000 per annum over the previous 5 years), our pool grant has remained at $4,113.31 for many years. To keep the pool operational, the school had to cover the loss of $4,689.85 from the previous season out of our main operations budget—which unfortunately cuts into funding for our kids' classroom learning resources. From this year, we will also be required to service our new dosing system. We are currently replacing our very old powder chlorine system with a much safer and efficient system.

We are requesting an increase due to the anticipated year on year costs and servicing on top of the losses incurred.

It's a valuable asset that our whole community has worked hard to upgrade and support through fundraising and grants. When the Balclutha pool has been closed, a number of local and visiting families head over to enjoy ours.

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

We appreciate that you are revisiting this funding and look forward to continuing support for this valuable asset.

View results

Respondent

7 Anonymous

11:45
Time to complete

About your organisation

1. Facility name *

Heriot School

2. Contact person *

Colin McHutchon

3. Email address *

principal@heriot.school.nz

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$13,954.23 ex

5. What were the **electricity** costs for your facility for the most recent financial year? *

We do not have separate costs for the pool. The total cost of electricity was $10, 368.93 ex. We suggest the pool would have used approximately 1/3 = $3456.31ex

6. What was the cost of **rates** for your facility for the most recent financial year? *

Total cost of rates $2,337.66, 1/3 = $779.22ex

7. What were your **insurance** costs (if any) for the most recent financial year? *

Total cost of insurance $795.44, 1/3 = $265.14ex

8. Are there any significant operating costs unique to your facility?

Chemicals & consumables $889.97 ex, Microbiological testing $396.00 ex, General boiler expenses 1/3 = $1385.27, Wood chips 1/3 = $6782.32 ex

Financial Information

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Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

A fixed dollar amount is much easier to budget with. The current amount is sufficient.

10. Why do you think this level of Council funding is reasonable? *

The current amount

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

No answer provided.

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name
Kaitangata Community Pool Incorporated
2. Contact person
Emma Kell – Secretary
3. Email address
kaitangatapool@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?
$5,531 ** Please note, R&M which would usually be included in our operation expenses were deferred and included in our pool upgrade which is not included in this financial period
5. What were the **electricity** costs for your facility for the most recent financial year?
$904 This is set to increase exponentially in the coming months due to us installing heat pumps to heat our pool which has not been heated in the past. As a reference, the Tapanui pool is now heated and cost $23,500 in the last financial year for electricity
6. What was the cost of **rates** for your facility for the most recent financial year?
n/a
7. What were your **insurance** costs (if any) for the most recent financial year?
n/a We have not paid any insurance in the past due to the pool coming under the CDC umbrella, however with our upgrades we will be insuring in the next financial year. Based on other local pool's insurance we anticipate this will be around $5,000 annually
8. Are there any significant operating costs unique to your facility?
Yes, we are heating our pool in the next financial year
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.

CLUTHA DISTRICT COUNCIL

We think a fixed amount, reviewable annually would be appropriate. We think $15,000
11. Why do you think this level of Council funding is reasonable?
Although a percentage based amount would be fantastic, how would this be managed by CDC to ensure equity and that facilities would be well managed financially by their committees?

CLUTHA DISTRICT COUNCIL

12. Is there anything else you would like Council to consider in relation to this review?
Our 2025/26 annual accounts are not yet finalized. Our AGM is on the 6th September and we will forward you a copy as soon as they are available. The figures included in this form are no longer relevant as we have undertaken a significant upgrade of the pool and installed heat pumps. From October 2026 when our pool will reopen, it will be a heated pool and our electricity bill will be 20 times bigger than what it has been. In light of this, we are going to install solar panels to offset the electricity cost. This is anticipated to cost $90,000 and we have raised just over half of the funds to be able to enable us to do this. Our operating expenses don't include any of the usual repairs and maintenance as this was deferred and to be included in our upgrade. We have not paid insurance in the past but will be doing so in the next financial year.

View results

Respondent

4 Anonymous

20:36
Time to complete

About your organisation

1. Facility name *

Owaka Swimming Baths Committee incorporated

2. Contact person *

Sarah Chittock

3. Email address *

owakaswimmingbaths@gmail.com

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$48,277

5. What were the **electricity** costs for your facility for the most recent financial year? *

$18,701

6. What was the cost of **rates** for your facility for the most recent financial year? *

$1

7. What were your **insurance** costs (if any) for the most recent financial year? *

$4,148

8. Are there any significant operating costs unique to your facility?

Chemical, cleaner

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

in the past we have asked for 2% of the uniform annual general charge from the ward you pool services, reason been that the rate payer are already contributing within there rate bills and under this part this included swimming pools, or half of the operational cost associated to the pool depending on each individual pool

10. Why do you think this level of Council funding is reasonable? *

Help keeps vital facility within local communities, by supporting small communities it reduced the isolation risk if people find traveling to the nears big town to costly. It provided a place for local people to gather and socialise. The pool is community owned and run by volunteers - rising operating cost place considerable pressure on small community that supports the pool and the small hard working committee are required to come up with fundraising ideas to keep the pool running and cover operational cost and repair and maintenance and improvements which is a huge task to also keep asking the local community to support the fundraising events. By working with council to help cover half or some of the cost eases the burden place on the committee to continue to provide a vital facility to the Owaka Ward.

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

That the funding is distributed equally in relation to operating cost and the effort the local community puts into fundraising and that the small rural pools are recognized for there effort they do to maintain the facilities

Additional information to question 10

Owaka Swimming Baths

Hi Sonia

I think we receive about $22,000 a year which I think is a great amount to cover cost etc.

Sarah

View results

Respondent

6 Anonymous

07:09
Time to complete

About your organisation

1. Facility name *

Tuapeka Aquatic Centre

2. Contact person *

Bri Clulee

3. Email address *

splashout2016@gmail.com

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$135,739

5. What were the **electricity** costs for your facility for the most recent financial year? *

$14,056

6. What was the cost of **rates** for your facility for the most recent financial year? *

$2,591

7. What were your **insurance** costs (if any) for the most recent financial year? *

$13,495

8. Are there any significant operating costs unique to your facility?

When we had to fund a temporary diesel boiler in Summer 2024/2025 it cost us an additional $40,000 to stay open for the season, after the school shut down their boiler for their Summer.

Employment costs are another huge cost, $20,000 annually.

We have recently been revalued, and our insurance is increasing from $13.5K to $35K annually. Power also continues to increase. The pool is continually running at a loss even with major volunteer committee effort to increase funds.

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

$50,000

10. Why do you think this level of Council funding is reasonable? *

This is not quite the whole difference between what we receive from memberships, and what it costs us to operate. We are expecting major increased costs over the next 12 months with insurance going up, and overall power increasing. This is also dependant on the school being able to continue covering heating costs.

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

Tuapeka Aquatic Centre is very appreciative of all of the support the council has given us in the past. Our small but dedicated volunteer committee puts in countless hours keeping the pool running, and as we are now at 10 years of being open finding areas that need upgraded are costing us a lot of money.

View results

Respondent

3 Anonymous

56:52
Time to complete

About your organisation

1. Facility name *

Waitahuna School

2. Contact person *

Susan Homer

3. Email address *

office@waitahuna.school.nz

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

2025 Financial Year $14,944.81
2025/2026 Swimming Season $16,839.21

5. What were the **electricity** costs for your facility for the most recent financial year? *

2025 Financial Year $4,807.11
2025/2026 Swimming Season $6,623.17

6. What was the cost of **rates** for your facility for the most recent financial year? *

The rates are incorporated into the schools rates

7. What were your **insurance** costs (if any) for the most recent financial year? *

$0

8. Are there any significant operating costs unique to your facility?

Electricity and Wages

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

10%

10. Why do you think this level of Council funding is reasonable? *

Because the pool is used by the school and also the community and is mainly funded by the school bulk grant and expenses are increasing.

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

Please note - I have included two lots of expenses. One is for the 2025 school financial year which is 01/01/2025-31/12/2025 and the other is for the swimming pool operating season which is November 2025-April 2026. Electricity is an ongoing cost each month whether the pool is open or not.

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name
Waiwera South School Community Pool
2. Contact person
Kaz Bissett
3. Email address
principal@waiwerasouth.school.nz
4. What was the **total** cost to operate your facility for the most recent financial year?
A close estimate is $7 775per year. Including Chemical, maintenance, wages, insurance and power - not including rates
5. What were the **electricity** costs for your facility for the most recent financial year?
$9 828.76 – The pool is attached to the school meter but looking at our January usage when there is no one at school where the majority of the power being used is the pool – I have conservatively put it at $250 a month - $3 000 per year. The pump runs 24/7 , 365 days of the year.
6. What was the cost of **rates** for your facility for the most recent financial year?
Whole school Rates $2 115.76. The pool is a portion of this -
7. What were your **insurance** costs (if any) for the most recent financial year?
Pool is insured for $178 448 at $1475 per year
8. Are there any significant operating costs unique to your facility?
This is a t a cost to school of approx. $6000 per year Total cost $7775 minus Key income $ 450 CDC grant $1347 Cost to school 2025. $5 978
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey

CLUTHA DISTRICT COUNCIL

10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
I feel we should be supported more than what we are for providing a community asset. Currently school is approximately $6000 out of pocket each year to run and maintain the facility. This is funding we have to fundraise from our community each year through various avenues – it is money that could be going into teaching and learning. The pool is an amazing asset to our community which we want to maintain. We request that Council cover 100% of the financial gap between operating costs and revenue, which currently leaves our school $6,000 out of pocket annually (with the current CDC grant) – our community/school should not be out of pocket for providing this service/asset. Aa key community asset, maintaining the pool should not rely on school fundraising that draws funding away from classroom learning. Given that our students do not enjoy equitable access to free swimming as those using the Balclutha pool, full funding from CDC would restore equity and support a vital rural asset.
11. Why do you think this level of Council funding is reasonable?
Our school should not be out of pocket to provide a community asset. Ratepayers in our community contribute to Council funding, yet our children cannot regularly access central amenities like the Balclutha pool. Council support ensures our local community receives an equitable return on their rates. The school and our local community shouldn't be out of pocket to run a community asset. Every dollar of the $6,000 we have to fundraise to keep the pool going is money taken away from our tamariki, and their learning and classroom resources.
12. Is there anything else you would like Council to consider in relation to this review?
Thank you for instigating the review – and for the ongoing support of the Waiwera South community pool

CLUTHA DISTRICT COUNCIL

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name	West Otago Swimming Pool Inc Soc.
2. Contact person	Robyn Maher.
3. Email address	westotago.pool@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?	$48,789 + GST.
5. What were the **electricity** costs for your facility for the most recent financial year?	20,621-75 + GST
6. What was the cost of **rates** for your facility for the most recent financial year?	Ministry of Education LAND. Rates are paid by Tapanui Primary School
7. What were your **insurance** costs (if any) for the most recent financial year?	$4555-73 plus GST
8. Are there any significant operating costs unique to your facility?	Yes, as an ageing facility, we face high, unpredictable costs maintaining underground water pipes, pumps and filtration systems. Locating and repairing subterranean leaks creates heavy operational expenses unique to our older asset.
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey	
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.	Fixed dollar amount: $10,000 to $15,000. A fixed grant provides certainty for both Council's long term plan budgeting and the pool committee's operational planning, avoiding annual administrative churn while ensuring the subsidy keeps pace with rising energy and chemical costs.
11. Why do you think this level of Council funding is reasonable?	

Chemicals $7431 + GST

2025/26 R+M 9560-00 + GST

CLUTHA DISTRICT COUNCIL

This level of funding is reasonable because West Otago ratepayers contribute to district-wide rates that support major council infrastructure across Clutha.
Providing fair, sustainable operational funding for our community-run pool is a small and equitable return on that investment - recognising that local volunteers actively save Council from having to step in and build or run a district asset themselves.

12. Is there anything else you would like Council to consider in relation to this review?

Museum – Surveys

- Kaitangata Black Gold Heritage Museum
- Owaka Museum
- South Otago Museum
- The Bruce Museum Trust
- Tuapeka Goldfields Museum
- West Otago Vintage Museum

View results

Respondent

9 Anonymous

08:38
Time to complete

About your organisation

1. Facility name *

Kaitangata Black Gold Heritage Museum

2. Contact person *

Joyce Beck - Secretary

3. Email address *

joycesidbeck@outlook.co.nz

Operating Costs

4. What was the **total** cost to operate your facility for the most recent financial year? *

$8,657.41

5. What were the **electricity** costs for your facility for the most recent financial year? *

$1,527.42

6. What was the cost of **rates** for your facility for the most recent financial year? *

CDC Rates $2441.88 ORC Rates $87.79 Total $2529.67

7. What were your **insurance** costs (if any) for the most recent financial year? *

$2170.13

8. Are there any significant operating costs unique to your facility?

Lawn mowing - Petrol and Oil - We have a large lawn and presently these costs have been donated but that won't always be the case.

Financial Information

Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz

Council Funding

What level of operational funding from Council do you think is reasonable, and why?

9. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount. *

ar present Council fund for Electricity, Rates and Insurance based on our actual costs for these services and we would like this to continue. We are able to fundraise for other expenses as required.

10. Why do you think this level of Council funding is reasonable? *

We know that Rates (both CDC and ORC), Power and Insurances are increasing dramatically and it is vital that council continues to reimburse us for these costs in order for us to remain solvent.

Additional Information

11. Is there anything else you would like Council to consider in relation to this review?

We are grateful for what Council does at present regarding our Rates, Insurance and Electricity.

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name
Owaka Museum
2. Contact person
Mike McPhee (Museum Manager) or Karen Bradfield (President, Catlins Historical Society)
3. Email address
Owakamuseum@outlook.com
4. What was the **total** cost to operate your facility for the most recent financial year?
$169,652 which includes $27,585 depreciation
5. What were the **electricity** costs for your facility for the most recent financial year?
$4079, but under our recent revised lease with CDC will now double to $8158 (approx.)
6. What was the cost of **rates** for your facility for the most recent financial year?
$1253, but under our recent revised lease with CDC will now double to $2506 (approx.)
7. What were your **insurance** costs (if any) for the most recent financial year?
$9693
8. Are there any significant operating costs unique to your facility?
Yes, $3515.60 to carry out inspections needed to obtain our annual Building Warrant of Fitness
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey ✓
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
$23,872.60 p.a. Comprising Electricity, Rates, Insurance, and Building Warrant of Fitness costs.

CLUTHA DISTRICT COUNCIL

11. Why do you think this level of Council funding is reasonable?

We feel this level of Council Funding is reasonable as our Museum provides a hub for Council Services, Visitor Information, and Community Library as well as recording, caring for, and displaying the history of the Catlins District.

We appreciate the funding CDC provides to us by leasing floor space from us and contracting with us to provide volunteers to assist with the Information service on weekends and Public Holidays.

We realise that other museums in the district are in more difficult circumstances than us and because of this we have never applied for direct funding of staff wages and instead try and make our own way financially by running a Museum Shop, Art Gallery, Entry fees and reduce our electricity costs with solar panels. We also regularly apply to outside funders for special projects, building developments or Museum equipment

12. Is there anything else you would like Council to consider in relation to this review? Yes, one more reimbursement.

Please consider reimbursing us for $3515.60 p.a. as mentioned on page one of this survey. This is the cost of Building Warrant

CLUTHA DISTRICT COUNCIL

of Fitness inspections.:

Consisting of:

Heatpumps, air conditioning and humidity control plant inspections, 4 x per year	$1460.52
All Fire Separations and Evacuation Signage Annual Inspection	$517.50
Fire Alarm Checks 12 x per year	$1235.88
Fire Extinguisher, Annual Inspection	$89.70
Building Warrant of Fitness Certificate, Annual	$212.00
Total	$3515.60

We believe this cost is as much an operating cost as ~~[illegible]~~ Rates, Electricity, and Insurance.

We will make a submission on this matter in the next planning round.

Thanks, very much for your continuing support.

Karen Bradfield (President, Catlins Hist. Society)
Mike McPhee (Manager, Owaka Museum)

SURVEY – Community Funding for Community Facilities

1. Facility name
The Clutha Museum – South Otago Historical Society
2. Contact person
Roz McKechnie
3. Email address
southotagomuseum@xtra.co.nz
4. What was the **total** cost to operate your facility for the most recent financial year?
$39603.97
5. What were the **electricity** costs for your facility for the most recent financial year?
$3937.66
6. What was the cost of **rates** for your facility for the most recent financial year?
$2989.74 (CDC 2673.36/ORC $316.38)
7. What were your **insurance** costs (if any) for the most recent financial year?
$4565.84 – mainly public liability – to insure the collection is prohibitive.
8. Are there any significant operating costs unique to your facility?
Curating Services, Fire Safety Servicing, Subscriptions (History NZ, Museums Aotearoa). Asbestos cleaning of artifacts – not necessarily an operating cost but urgent because of the need to assess and deaccession many of these items.
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey These figures reflect our operating costs for the 2025 – 2026 financial year; full audited accounts will be completed when the Treasurer returns from holiday in early September.
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
To maintain current Curator hours of 10 per week requires $20,000 + GST; Plus $12000 to cover Rates, Insurance and Power reimbursement = $32000 per annum would be the minimum.

11. Why do you think this level of Council funding is reasonable?
This would be the minimum curator hours; however it has been noted by staff from Te Papa who have visited that a museum of this size requires at least 2 full-time Curators to adequately manage and conserve the collection. There are very few funders who will grant salaries, so we are reliant on CDC funding at this stage as we are not getting enough income to cover this as well as our other operational expenses. The current curator is attempting to do as much as she can with the hours available and indeed is putting in at least 15 hours a week on a voluntary basis. There is also a concern about succession – we do not have the income to employ another person. The museum is at risk of potential closure, the collection is deteriorating, the building has outlived its usefulness, and the existing committee structure is failing due to people not being willing to come on to the committee. I think this minimum level of Council funding is very reasonable given the above issues.

12. Is there anything else you would like Council to consider in relation to this review?
Given our building issues, CDC contribution to whatever the decision is regarding renovation vs rebuild would be helpful down the track but at this stage we cannot put a figure on this. We are planning a public meeting in late September to make this decision. We will probably require assistance with funding the leasing costs of a temporary museum while the building work is being done. Asbestos cleaning of artifacts – not necessarily an operating cost but urgent because of the need to assess and deaccession many of these items. $32,240.00 quote received for cleaning artifacts stored in asbestos contaminated areas. $10,000 grant from Otago Community Trust, Request therefore $22,240.00 balance required.

SURVEY – Community Funding for Community Facilities

1. Facility name
Bruce Museum Trust – Information Centre and Museum
2. Contact person
Noeline Milne
3. Email address
miltoninfo@xtra.co.nz
4. What was the total cost to operate your facility for the most recent financial year?
$21,000 This is from the 2024/2025 year balance- our books for 2025/26 are still at the accountants
5. What were the electricity costs for your facility for the most recent financial year?
$3,845.30
6. What was the cost of rates for your facility for the most recent financial year?
$4,190.00 Otago Regional Council = $195.00
7. What were your insurance costs (if any) for the most recent financial year?
$6,328.68 2025/2026
8. Are there any significant operating costs unique to your facility?
Heating – coal $3,445.20
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
For the 2025/ 26 year we received $6,373.00 Reimbursement of $400 for the use of the Coronation hall for the book sale. Fixed sum perhaps of $8,000.00

11. Why do you think this level of Council funding is reasonable?
We operate as a public facility for the benefit of the District. We provide Tourism and Heritage information to a variety of visitors, local and international. We are a contact for people wanting to locate services available in the township and district. Travelers look for local information, how to access other places in the Clutha District – not everyone is able to use cell phones or electronic devices for this purpose. We provide research facilities of local history, access to free WiFi, copying facility. The Centre is operated with volunteers which does not put further costs on to the Ratepayers. The volunteer's local knowledge is very helpful. A small portion of income pays for a maintenance person for heating attention and financial/treasurer commitments. The attached accommodation provides funds to go to the upkeep of the facility over and above the Council funding. A lower rent is asked as it is not a modern building. We seek funding from other sources for major projects. We do not sell a lot of items in the souvenir line, commission on bus bookings, the Annual Book Sale and door donations are ways the Centre generates income.

12. Is there anything else you would like Council to consider in relation to this review?
The Heritage building that we endeavor to maintain to add to the District history is important – Milton is the gateway to the South and Central Otago. The Rail Trail attracts a lot of people to the town and the new facilities being erected will also add to the town's vitality.

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name
Tuapeka Goldfields Museum Society Incorporated
2. Contact person
Gaye Cowie - Treasurer
3. Email address
gaye@shandthomson.co.nz
4. What was the **total** cost to operate your facility for the most recent financial year?
$23,132 (as per page 12 of the FY26 financials
5. What were the **electricity** costs for your facility for the most recent financial year?
$5,670
6. What was the cost of **rates** for your facility for the most recent financial year?
$2,502
7. What were your **insurance** costs (if any) for the most recent financial year?
$2,411
8. Are there any significant operating costs unique to your facility?
No
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
TGM is of significant importance to the Clutha District in telling the story of NZ's first gold rush and impact on our Otago & NZ history. We believe that CDC should prioritize support to ensure we can attract tourists to the district which in turn will provide benefits to all. We believe the CDC should be funding our operating costs as well as a full-time museum curator.

CLUTHA DISTRICT COUNCIL

11. Why do you think this level of Council funding is reasonable?
As above #10.

12. Is there anything else you would like Council to consider in relation to this review?
As above #10.

Tuapeka Goldfields Museum

Extra info to Question 10

Hello Sonia

We believe the annual funding from CDC should cover our operating expenses of electricity $5,670,

rates $2,502 & insurance $2,411 as well as curator wages of $54,600.

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name	WEST OTAGO VINTAGE CLUB
2. Contact person	Gloria McHutchon – Secretary
3. Email address	westotagovintage@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?	$17,564.10 + GST
5. What were the **electricity** costs for your facility for the most recent financial year?	$1349.01 + GST
6. What was the cost of **rates** for your facility for the most recent financial year?	$2806.64 + GST
7. What were your **insurance** costs (if any) for the most recent financial year?	$2971.85 + GST
8. Are there any significant operating costs unique to your facility?	Rent $1690 + GST
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey	
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.	100% = $17,564.10 + GST
11. Why do you think this level of Council funding is reasonable?	

CLUTHA DISTRICT COUNCIL

We have no other funding source.
We are all volunteers.
Tourism in Clutha benefits from the museum when operating efficiently.
We could gain funding from entry, but if museum not attractive = no visitors.

12. Is there anything else you would like Council to consider in relation to this review?

Recreation Centres – Surveys

- Clutha Recreation Centre T/A Cross Recreation Centre
- Simpson Park
- Te Pou Ō Mata Au | Clutha District War Memorial & Community Centre

SURVEY – Community Funding for Community Facilities

1. Facility name
Clutha Recreation Centre Inc T/A Cross Recreation Centre
2. Contact person
Simon Cullen Noelene Scott
3. Email address
committee@crossrecreationcentre.co.nz manager@crossrecreationcentre.co.nz
4. What was the **total** cost to operate your facility for the most recent financial year?
$374,122 (25/26 year, GST excluded)
5. What were the **electricity** costs for your facility for the most recent financial year?
$16,186 including gas hot water (GST excluded)
6. What was the cost of **rates** for your facility for the most recent financial year?
$2,826 (GST excluded)
7. What were your **insurance** costs (if any) for the most recent financial year?
$43,105 (GST excluded)
8. Are there any significant operating costs unique to your facility?
Facility building compliance costs $16,933 (GST excluded) Wages and associated staffing costs $206,572 (GST excluded)
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.
Annual operational funding from the CDC of 1/3 (33.3%) of operating expenses would be highly desirable. If last year's expenses of $374K are used that would give a figure of $124,500.

11. Why do you think this level of Council funding is reasonable?
This level of operational funding would give the Cross Recreation Centre (CRC) year-to-year function much more certainty and create less stress for staff and the volunteer governance committee, while allowing the focus to be on covering the remaining expenses from user charges, sponsorship, other grants and donations. We are continuing to explore different fundraising avenues with some successes but this is unlikely to solve our long-term funding dilemma alone. An increase in the level of Council funding would allow the CRC to put more resources towards maximizing opportunities for the Clutha District community to utilise the facility. While undertaking this we would be doing our part to align with the Council's 'Living & Working In Clutha Strategy', fostering community wellbeing and connection, accessibility and inclusiveness, and helping make the district an attractive place to reside.
12. Is there anything else you would like Council to consider in relation to this review?
The Dunedin City Council gives the Edgar Centre a net annual operational grant of $250,000 The Gore District Council spends between $1.5M and $1.75M net annually on running the Gore Multisports Complex (includes pool and ice skating rink) The Invercargill City Council gives ILT Stadium Southland $700K annually. The Southland District Council gives $75K. Total council annual funding $775K The Waitaki District Council is expecting to contribute between $220K to $265K to the net annual running costs of the Network Waitaki Events Centre The Queenstown Lakes District Council spends $1.1-1.4M net annually on running the Wanaka Recreation Centre (includes pool) What do all these numbers show? That running sports/event/recreation facilities are expensive but these facilities are now part of the services expected to be present and funded whether fully or partly by local government bodies. The Clutha District Council has been putting $750K annually towards the Balclutha Centennial Pool with just over 40,000 users annually. Operating expenses are forecast to be over $1M annually going forward.

The Cross Recreation Centre (CRC) is approaching 100,000 visitors per year with operational funding of about $50-55K from Council for the past 10 years (one off extra $20K funding last year and $110K granted for 26/27).

This demonstrates the 'bang for buck' that is achieved by the CRC. With the security of a little more annual Council funding towards operational expenses, CRC could confidently look to do even more for the local community.

(Sources: Various online Council documents)

SURVEY – Community Funding for Community Facilities

1. Facility name
Simpson Park Sporting Complex
2. Contact person
Treasurer – Sarah Homer Secretary – Sophie Young
3. Email address
simpsonparklawrence@gmail.com
4. What was the **total** cost to operate your facility for the most recent financial year?
The total cost to operate Simpson Park Sporting Complex for the year ended 31 March 2026 was $149,473. This is the total expenses figure and includes depreciation of $22,973. Excluding depreciation, operating costs were $126,500.
5. What were the **electricity** costs for your facility for the most recent financial year?
The electricity costs for the year ended 31 March 2026 were $3,189.
6. What was the cost of **rates** for your facility for the most recent financial year?
The rates cost for the year ended 31 March 2026 was $986.
7. What were your **insurance** costs (if any) for the most recent financial year?
The insurance costs for the year ended 31 March 2026 were $23,509.
8. Are there any significant operating costs unique to your facility?
Yes. A significant operating cost unique to the facility is the management and trading of cattle grazed by local farmers, which cost $39,827 in the year ended 31 March 2026. This includes livestock purchases, animal health, cartage and stock adjustments, and is offset by income from cattle sales. The facility also operates a bar, with related costs of $14,240.
9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey
10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.

Council currently contributes $6,831.78 annually, and we would need this level of operational funding to be maintained at a minimum. However, with increasing insurance, maintenance, utilities and other operating costs, we would welcome consideration of a higher annual contribution.
11. Why do you think this level of Council funding is reasonable?
This level of funding is reasonable because Simpson Park is a heavily used community facility that supports a wide range of sporting, recreational, educational and community groups. It provides an important shared space for local clubs, Lawrence Area School, events and wider community activities. Council's contribution helps ensure the facility remains safe, maintained and affordable for community use. The current contribution of $6,831.78 covers only a small proportion of the facility's total annual operating costs, while the balance is generated through fundraising, subscriptions and commercial activities. Maintaining this funding, and preferably increasing it recognises the broad community benefit provided by the facility and the increasing costs of insurance, utilities, repairs and general maintenance.
12. Is there anything else you would like Council to consider in relation to this review?
Council should consider the important role Simpson Park plays as a shared community hub for Lawrence and the surrounding area. The facility is heavily used by sporting, educational and community groups, and much of the work required to manage and maintain it is undertaken by volunteers. We would also ask Council to consider the increasing costs of insurance, utilities, repairs and maintenance, and the importance of providing reliable, long-term operational funding. This would help keep the facility safe, well maintained and affordable for the many community groups that rely on it.

CLUTHA DISTRICT COUNCIL

SURVEY – Community Funding for Community Facilities

1. Facility name
Te Pou Ō Mata Au | Clutha District War Memorial & Community Centre
2. Contact person
Mary Woodrow
3. Email address
mary@tpoma.nz
4. What was the **total** cost to operate your facility for the most recent financial year?
FY26 total operating costs: $566,189 FY26 operating costs inclusive of depreciation: $1,245,564
5. What were the **electricity** costs for your facility for the most recent financial year?
FY26: $102,469
6. What was the cost of **rates** for your facility for the most recent financial year?
FY26: $5,637
7. What were your **insurance** costs (if any) for the most recent financial year?
FY26: $56,532
8. Are there any significant operating costs unique to your facility?
Yes, Te Pou Ō Mata Au operates under a commercial operational model distinct from standard community halls. The prominent location in Balclutha and its modern design provides an important impression for the Clutha District. TPŌMA acts as a “central hub” for the district with an expectation that it is open and available to the public 7 days a week. The above leads the facility to being: • **Adequately Resourced & Staffed:** Delivering the expected level of accessibility and service, managing bookings, and supporting, promoting and delivering community/district events across the wider Clutha area requires paid resourcing of wages for staff to deliver these events and manage the facility. • **Emergency Hub & Service Centre:** The facility is available as a meeting point for the district as it houses a backup generator. *We were able to see the benefits of this after the wind event in October last year.* There are key services located here, e.g. Clutha District Land Search and Rescue, information centre and a fully serviced kitchen. • **Essential Public Amenities:** We provide public toilets that are open 7 days a week to the public. These require daily cleaning and security.

- **Insurance:** The fixed cost of insurance is significant given it is a $24 million modern civic facility that delivers a various range of services and activities for the community. The annual premium for 2027 is $56,532
- **Community Subsidisation:** Balancing the public good expectation means we subsidise access for not-for-profit organisations and community groups through reduced hire rates. In addition, the facility is supported by over 760 annual volunteer hours (refer to Annual Report).

9. Please email your most recent financial statements to sonia.farquharson@cluthadc.govt.nz with a copy of this survey

10. What level of operational funding do you think Council should contribute towards your annual operating costs? This could be a percentage of your total costs, or a fixed dollar amount.

A baseline fixed operational grant of $80,000 per year.

11. Why do you think this level of Council funding is reasonable?

- **Delivering District Wide Value:** Te Pou Ō Mata Au is a primary visitor destination, events, community services, war memorial, and cultural hub serving the entire Clutha District. In its relatively short operating period to date, it has been able to host events that otherwise may not have been possible, e.g. Six60, Matariki Festival, Kaylee Bell. In the calendar year of 2025, 35,517 people attended events or meetings at TPŌMA, there were 39,877 visitors to the facility and 1,366 venue hire bookings.
- **Break-Even Baseline:** The requested $80,000 would ensure the Trust continues to break even from a cash flow perspective.
  The financial support will provide time to become fully tenanted. A fully tenanted facility and growing the activity base will mean we can build moderate reserves. These reserves will help future maintenance requirements and contribute to meeting the cost of asset replacement.
- **Mitigating Trustee Financial Exposure:** Operating at a deficit exposes community volunteer trustees to personal and financial risks in their capacity as personal trustees. While we continue to strive for financial sustainability, we require continued support from our Council to get to this position. We are currently exploring options including a commercial bank loan to enable completion of development of the remaining tenancy space to fully tenant the facility.
- **Community Investment:** The community contributes over 760 volunteer hours annually in various capacities (direct involvement in activities in the facility and provides the governance and oversight of the team) and charges a nominal fee to keep facilities accessible to local not for profit community groups and schools. We continue to strive for financial sustainability whilst balancing the public good expectation.
- **Exhaustion of External Grant Pathways:** Sourcing external financial support from traditional sources in the past is proving to be more challenging in the current economic environment. The Trust has proactively and successfully

applied to all available external operational funding sources, including COGS and Lotteries multi-year grants. These external avenues are typically oversubscribed, with no remaining grant mechanisms available at the required scale. CDC's $80,000 grant underpins the operational viability of this community asset.
12. Is there anything else you would like Council to consider in relation to this review?
• **Strategic Alignment & Vision:** We ask Council to clarify its long-term vision for community-owned facilities. Divesting operational responsibilities onto community groups with limited financial support puts key district assets at risk. • **Asset Replacement & Building Repair Reserves:** The current revenue is struggling to cover day-to-day expenditure, leaving no ability to build reserves to cover major maintenance requirements and the future replacement of assets. The Trust's aim is to have the facility fully tenanted, commercial users to pay a fair market rent but still cater for the many community groups that make up our community at a minimal charge. A fully tenanted & active facility will provide the best opportunity to build modest reserves and cover future contingencies. • **Pricing & Capacity:** The Trust has undertaken a pricing review of charge out rates (we are estimating a full capacity income/occupancy target mapped through to 2027/28 financial year). Unfortunately, user fees alone cannot bridge the operational gap without pricing out local community groups. We are actively monitoring our pricing schedules. • **Proposal for a Multi-Year Strategic Partnership (MOU):** Given that TPŌMA is a major civic, emergency, and cultural asset rather than a standard local hall, we strongly encourage Council to move beyond ad hoc annual grant reviews. We recommend establishing a formal 3-year Strategic Partnership Agreement (MOU) indexed to inflation. This would provide the Trust with medium term financial stability, assist with the protection of volunteer trustees from unfair personal financial liability exposure, and formally recognise TPŌMA's ongoing impact to the Clutha District.

Long Term Plan 2027/37

Workshop Topic	LTP Early Residents Consultation
Workshop Date	17 September 2026
Session Number	6
Author	Peter Stafford – Strategic Planning and Policy Manager
M-Files Ref	1057175

SUMMARY

This session will provide a discuss the proposed early LTP Residents Consultations to take place in October/November 2026.

PROPOSED WORKSHOP OUTCOMES/DIRECTIONS

1. **Council consider and provides direction the proposed early LTP Residents Consultations to take place in October/November 2026**

REPORT

Background

At Council's LTP Workshop on 20 August 2026 Council considered methods for early engagement of residents on service levels and trade-offs underpinned by giving residents clear information about the costs and consequences associated with reducing services.

This was in the context of options considered for reviewing services and budgets as part of Long-Term Plan development. Discussion included service cessation options, potential 25% departmental cost reductions, community grants review, operational efficiencies, and a Zero-based budget.

This session will be facilitated by a MS PowerPoint presentation.