



Finance and Performance Committee

Te Komiti Pūtea Mahi

Thursday, 29 August 2024
Rāpare, 29 Hereturikōkā 2024

Tōtara Room, Whakatāne District Council
14 Commerce Street, Whakatāne
9:00 am

Acting Chief Executive: David Bewley
Publication Date: 23 August 2024

Live Streaming the Meeting - *Ka whakapāho mataora te hui*

Live Streaming the Meeting - *Ka whakapāho mataora te hui*

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A Membership - *Mematanga*

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Mayor Dr V Luca

Councillor J C Jukes - Chairperson

Deputy Mayor L N Immink - Deputy Chairperson

Councillor T Boynton

Councillor G L Dennis

Councillor A V Iles

Councillor W B James

Councillor T O'Brien

Councillor J W Pullar

Councillor N S Tánczos

Councillor N Rangiaho

B Delegations to the Finance and Performance Committee - *Tuku Mahi ki te Komiti*

To monitor the financial and non-financial performance of Council and provide governance oversight to organisational development.

- a. To monitor the implementation of Council's organisational performance framework.
- b. To monitor financial and non-financial performance of Council against the Long-Term Plan and Annual Plan.
- c. To develop and recommend to the Council the adoption of the Annual Report.
- d. To monitor financial and non-financial performance of CCOs and CCTOs to which Council is a member or shareholder.
- e. To develop and recommend to Council the adoption of the Half Yearly and Full Year Annual Report of the Whakatāne Airport.
- f. To monitor the implementation of Council's Financial Strategy.
- g. To monitor organisational capacity and capability of underlying systems and resources required to deliver on Council's Long-Term Plan and Annual Plan obligations.
- h. To monitor organisational development projects and initiatives.
- i. To monitor Council participation in local government excellence programmes such as LGNZ CouncilMARK, and PWC/SOLGM Performance Excellence Programme.
- j. To provide governance oversight and monitoring of councils external funding and financing sources.

TABLE OF CONTENTS

| | | |
|------------|---|-----------|
| 1 | Meeting Notices - <i>Ngā Pānui o te hui</i> | 7 |
| 2 | Apologies - <i>Te hunga kāore i tae</i> | 7 |
| 3 | Acknowledgements / Tributes - <i>Ngā Mihimihi</i> | 7 |
| 4 | Conflicts of Interest - <i>Ngākau kōnatunatu</i> | 8 |
| 5 | Public Participation- <i>Wānanga Tūmatanui</i> | 9 |
| 5.1 | Public Forum - <i>Wānanga Tūmatanui</i> | 9 |
| 5.2 | Deputations - <i>Nga Whakapuaki Whaitake</i> | 9 |
| 6 | Confirmation of Minutes - <i>Te whakaaetanga o ngā meneti o te hui</i> | 10 |
| 7 | Reports - <i>Ngā Pūrongo</i> | 11 |
| 7.1 | P12 Indicative Financial Report to June 2024 | 11 |
| 7.1.1 | Appendix 1 - 2023/24 Year End Rates and Rates Debtors Analysis report. | 20 |
| 7.2 | Capital and Operating budgets proposed to carry forward to 2025 (LTP2034 Year 1) | 21 |
| 7.2.1 | Appendix 1 – Capital Expenditure Projects to Carry Forward to 202425 - Major Projects | 25 |
| 7.2.2 | Appendix 2 – Capital Expenditure Projects to Carry Forward to 202425 - Other Projects and general renewals | 27 |
| 7.2.3 | Appendix 3 - Operating Expenditure Projects to Carry Forward to 202425 | 29 |
| 7.2.4 | Appendix 4 - Placeholder Projects | 31 |
| 7.2.5 | Appendix 5 – CCO Whakatāne Airport Carry Forward to 202425 | 33 |
| 7.2.6 | Appendix 6 – Schedule of major budget under and overages based on proposal | 35 |
| 7.3 | Organisation Performance Report Quarter 4 2023/24 | 37 |
| 7.3.1 | Appendix 1 - Organisation Performance Measures Q4 2023-24 | 39 |
| 7.4 | Draft Annual Report 2023/24 | 64 |
| 7.4.1 | Appendix 1 - Draft Annual Report 2023/24 | 67 |

| | | |
|------------|--|------------|
| 7.4.2 | Appendix 2 - Indicative GOA Financials 22 August 2024 | 150 |
| 7.4.3 | Appendix 3 - Whole of Council Financial Statement | 171 |
| 7.5 | 2023-2024 Resident Survey Report | 172 |
| 7.5.1 | Appendix 1 - Whakatane District Council Resident Survey Report 2023-24 | 174 |

1 Meeting Notices - Ngā Pānui o te hui**1 Meeting Notices - Ngā Pānui o te hui****1. Live Streaming**

The Whakatāne District Council livestreams Council and Standing Committee meetings held in Tōtara Room, within the Council building. The webcast will live stream directly to Council's YouTube channel in real time. The purpose of streaming meetings live is to encourage transparency of Council meetings.

Welcome to members of the public who have joined online and to those within the public gallery.

By remaining in the public gallery, it is understood your consent has been given if your presence is inadvertently broadcast. Please be aware the microphones in Totara Room are sensitive to noise, so please remain quiet throughout the meeting unless asked to speak.

2. Health and Safety

In case of an emergency, please follow the building wardens or make your way to the nearest exit. The meeting point is located at Peace Park on Boon Street.

Bathroom facilities are located opposite the Chambers Foyer entrance (the entrance off Margaret Mahy Court).

3. Other**2 Apologies - Te hunga kāore i tae**

At the time of compiling the agenda there was an apology from Councillor J Pullar.

3 Acknowledgements / Tributes - Ngā Mihimihi

An opportunity for members to recognise achievements, to notify of events, or to pay tribute to an occasion of importance.

4 Conflicts of Interest - *Ngākau kōnatunatu*

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Members are reminded of the need to be vigilant to stand aside from decision making when a conflict arises between their role as an elected member and any private or other external interests they might have.

The Elected Member Register of Interest is available on the Whakatāne District Council website. If you wish to view the information, please click this [Register Link](#)

5 Public Participation- *Wānanga Tūmatanui***5 Public Participation- *Wānanga Tūmatanui*****5.1 Public Forum - *Wānanga Tūmatanui***

The Committee has set aside 30 minutes for members of the public to speak in the public forum at the commencement of each meeting. Each speaker during the forum may speak for five minutes. Permission of the Chairperson is required for any person wishing to speak during the public forum.

With the permission of the Chairperson, Elected members may ask questions of speakers. Questions are to be confined to obtaining information or clarification on matters raised by a speaker.

5.2 Deputations - *Nga Whakapuaki Whaitake*

A deputation enables a person, group or organisation to make a presentation to Committee on a matter or matters covered by their terms of reference. Deputations should be approved by the Chairperson, or an official with delegated authority, five working days before the meeting. Deputations may be heard at the commencement of the meeting or at the time that the relevant agenda item is being considered. No more than two speakers can speak on behalf of an organisation's deputation. Speakers can speak for up to 5 minutes, or with the permission of the Chairperson, a longer timeframe may be allocated.

With the permission of the Chairperson, Elected members may ask questions of speakers. Questions are to be confined to obtaining information or clarification on matters raised by the deputation.

6 Confirmation of Minutes - *Te whakaaetanga o ngā meneti o te hui*

6 Confirmation of Minutes - *Te whakaaetanga o ngā meneti o te hui*

The minutes from the Finance and Performance Committee meeting held Thursday 13 June 2024 can be viewed via the Council website.

Click on the link below in order to view the 'unconfirmed minutes'.

- [Finance and Performance Standing Committee | 13 June 2024 | Whakatāne District Council \(whakatane.govt.nz\)](https://www.whakatane.govt.nz/finance-and-performance-standing-committee/13-june-2024)

7 Reports - Ngā Pūrongo

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7.1 P12 Indicative Financial Report to June 2024



To: **Finance and Performance Committee**

Date: **Thursday, 29 August 2024**

Author: **G Connolly / CFO and GM Business Partnering**

Authoriser: **D Bewley / Acting Chief Executive**

Reference: **A2731471**

1. Reason for the report - *Te Take mō tēnei rīpoata*

To provide the Finance and Performance Committee with the Indicative Financial Performance Reporting for the financial year ending 30 June 2024.

2. Recommendations - *Tohutohu akiaki*

THAT the Finance and Performance Committee **receive** the financial performance report for the period ending 30 June 2024.

3. Background - *He tirohanga whakamuri*

This report is presented to the Finance and Performance Committee as a snapshot of management financial performance for the 12 months of the financial year ended 30 June 2024. This provides an indication of financial performance for the year and insights on any key variances to performance which have been identified.

3.1. Financial Performance Summaries

The major financial KPI indicators are summarised as follows:

- a **Surplus of Operating Activities** of \$6.6m is \$3m higher than the revised budget of \$3.7m [Q3 Fcst \$6m]. Other income (predominantly interest received on prefunding) combined with finance costs and payment to suppliers less than budget are the significant drivers of the favourable result. Higher than anticipated revenue (\$1m) when compared to Q3 forecast relates to Better Off Funding subsidies (timing) and higher than forecast water usage rates.
- a **Deficit of Net Capital Expenditure before Borrowings** of \$26.9m is \$36.8m less than revised budget of \$63.7m [Q3 Fcst \$31.7m], reflecting timing of capital expenditure. This is \$4.8m less than Q3 forecasts and may result in more carry-forward to the 2025 financial year. a **Reported Accounting Operating Deficit** of \$(0.65)m is (\$5.9)m less than revised budget of \$5.3m [Q3 Fcst \$(2.7)m deficit], largely driven by the timing of capital expenditure with capital subsidies reporting below budget by \$10.3m, partially offset with the higher than budget surplus of operating activities.

7.1 P12 Indicative Financial Report to June 2024(Cont.)

- an **Accounting Operating Deficit from all Activities** of \$(1.3)m which is 11m less than the revised budget surplus of \$9.9m [Q3 Fcst \$2.7m deficit]. After allowing for the variances indicated above the report is largely in line with Q3 forecasts; the major exception being accounting standards-based Gain on Revaluation - Property, Plant & Equipment, Future loss on sale of investment property and Capital Expenditure. Gain on Revaluation was forecast in line with budget in Q3 forecasts pending revaluation reports. The revaluation report has not been received at the time of writing this report, this represents a \$4.2m variance to forecast and results in the overall position moving from a surplus anticipated in Q3 forecasts to a deficit position in this reporting. It is anticipated that once updated revaluations are processed the position will move to back to being a surplus in line with Q3 forecast.

3.2. Indicative Nature

The figures in this report are indicative and primarily offer a comparative view of planned performance from a management perspective. The finance team is still processing year-end accounting entries for the Annual Report, which may affect these figures. However, we do not expect any changes to significantly impact the management performance outlook. Any adjustments are likely related to non-management accounting measures, such as asset revaluations.

3.3. Comparatives

- **Revised Budget Full Year:** This report compares the figures against the Revised Budget for the full year (1 July 2023 to 30 June 2024), which reflects the 2024 published annual plan adjusted for carryforward of opex and capex budgets from the 2023 financial year.
- **Previous Forecast Full Year:** This reflects the projected full-year outcome based on the March 2024 Q3 actuals, incorporating the projection for 1 April-30 June. This forecast was presented to the Finance and Performance Committee at their last meeting.

4. Issue/subject – *Kaupapa***4.1. Financial Report 2024 (1 July 2023 – 30 June 2024)**

The Financial Report for the 2024 financial year reflects an overall deficit of \$1.3m, against a surplus budget of \$9.9m this represents an overall below budget position of \$11m. The major variances are the lower capital subsidies revenue \$10.3m and the gain on revaluation was in budget at \$4.2m but for which the measurement is still being assessed by valuers. It is anticipated that this position will be addressed successfully once revaluation figures are received and processed.

The information presented depicts financial impacts of Operating and Capital Expenditure at a summary level along with explanations of material variances.

7.1 P12 Indicative Financial Report to June 2024(Cont.)

| Indicative Financial Performance For the 12 Months ending 30 June 2024 | Actual FY \$000 | Revised Budget FY \$000 | Variance FY \$000 | Previous Fcst FY (Q3- Mar'24) \$000 | Variance to Previous Fcst \$000 |
|---|-----------------------|----------------------------------|-------------------------|--|---------------------------------------|
| OPERATIONAL | | | | | |
| Sources of Operating Funding | | | | | |
| Revenue from Rates | 60,294 | 60,260 | 34 | 59,819 | 475 |
| User Fees and Charges | 11,224 | 11,594 | (370) | 11,252 | (28) |
| Subsidies and Grants for Operating Purposes | 8,532 | 8,374 | 158 | 8,017 | 515 |
| Other Operating Income | 3,618 | 2,047 | 1,571 | 3,385 | 233 |
| Total Sources of Operating Funding | 83,668 | 82,275 | 1,392 | 82,473 | 1,195 |
| Applications of Operating Funding | | | | | |
| Payment to Staff | 27,596 | 27,086 | (509) | 27,235 | (361) |
| Payment to Suppliers | 41,694 | 43,229 | 1,535 | 41,420 | (274) |
| Financing Costs | 7,798 | 8,281 | 483 | 7,800 | 2 |
| Total Applications of Operating Funding | 77,088 | 78,597 | 1,509 | 76,455 | (633) |
| Surplus (Deficit) of Operating Activities | 6,580 | 3,679 | 2,901 | 6,018 | 562 |
| CAPITAL | | | | | |
| Sources of Capital Funding | | | | | |
| Subsidies and Grants for Capital Purposes | 18,841 | 29,190 | (10,349) | 17,728 | 1,113 |
| Development Contributions | 198 | 426 | (228) | 170 | 28 |
| Total Sources of Capital Funding | 19,039 | 29,616 | (10,577) | 17,898 | 1,141 |
| Applications of Capital Funding | | | | | |
| Capital Expenditure | 45,937 | 89,260 | 43,323 | 49,630 | 3,693 |
| Increase (Decrease) of Investments | 0 | 4,100 | 4,100 | 0 | 0 |
| Total Applications of Capital Funding | 45,937 | 93,360 | 47,423 | 49,630 | 3,693 |
| Surplus (Deficit) of Net Capital Expenditure | (26,898) | (63,744) | 36,846 | (31,732) | 4,834 |
| OTHER ACTIVITIES | | | | | |
| Non-Operating Activities | | | | | |
| Depreciation | (26,269) | (28,014) | (1,745) | (26,602) | (333) |
| Gain (Loss) on Revaluation - Derivatives | (611) | 1,368 | (1,979) | 272 | (883) |
| Gain (Loss) on Disposal of Assets | 0 | 0 | 0 | 205 | (205) |
| Gain (Loss) on Revaluation - Property, Plant & Equipment | 6 | 4,176 | 4,170 | 4,176 | (4,170) |
| Future loss on sale - investment property | 0 | (888) | 888 | (888) | 888 |
| Surplus (Deficit) of Other Activities | (26,874) | (23,358) | 3,516 | (23,042) | (4,702) |
| FUNDING SUMMARY | | | | | |
| Surplus (Deficit) of Operating Activities | 6,580 | 3,679 | 2,901 | 6,018 | 562 |
| Surplus (Deficit) of Net Capital Expenditure | (26,898) | (63,744) | 36,846 | (31,732) | 4,834 |
| Net Operating and Capital Cash Utilisation | (20,318) | (60,065) | 39,747 | (25,714) | 5,396 |
| Funding (Debt) Movements | 23,892 | 62,215 | (38,323) | 27,700 | 3,808 |
| Reserves Funding Balance (Equity/Working Capital) | (3,574) | (2,150) | (1,424) | (1,986) | 1,588 |
| Balance of Borrowings (Net of Deposits on Call and on Term) | 135,877 | 174,200 | (38,323) | 137,900 | 2,023 |

The surplus for operating activities of \$6.5m is \$3m more than the budgeted operating surplus of \$3.7m, a positive movement of \$0.6m compared to Q3 forecasts.

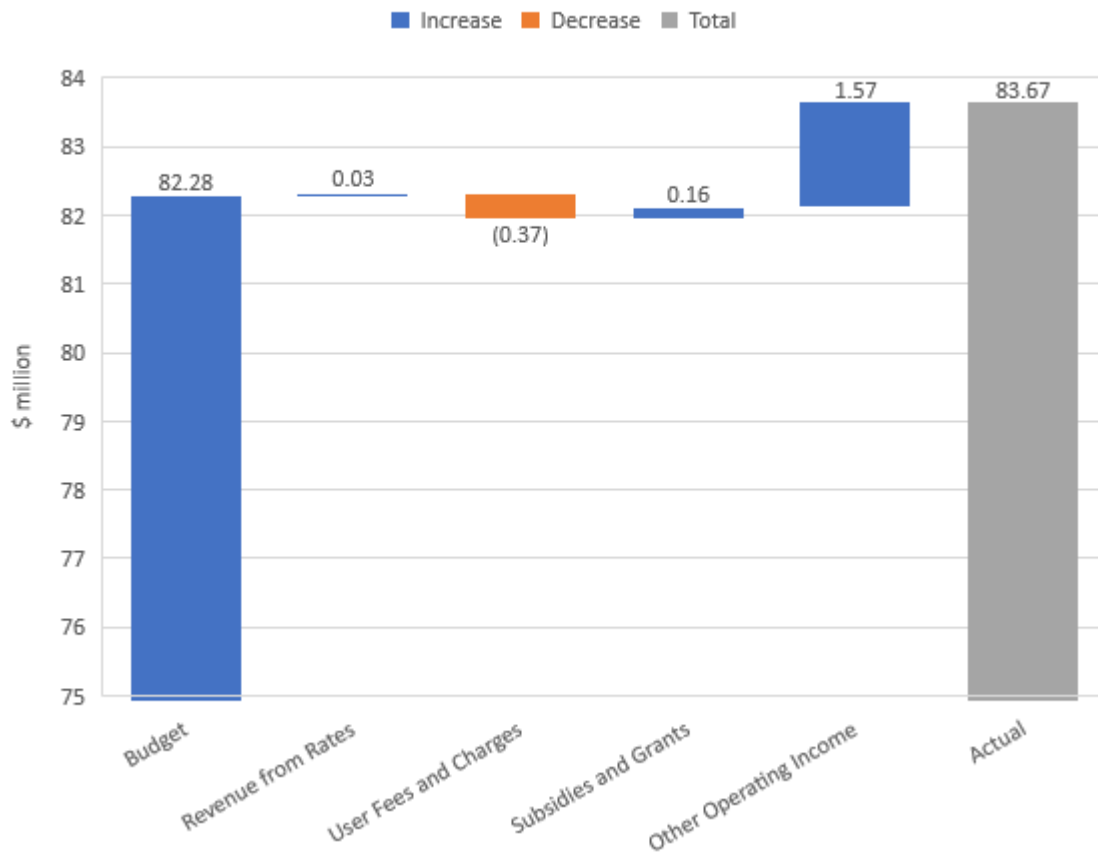
As reported throughout the 2024 financial year the main drivers of this variance are higher than budget interest revenue and some operational project expenditure behind schedule at year end. It is anticipated that approval will be sought for some of this operational expenditure to be carried forward to the 2025 financial year.

4.2. OPERATING PERFORMANCE

Operating Revenue (Sources of Operating Funding) is within range of budget overall at the end of the 2024 financial year; actual of \$83.7m is \$1.4m (1.7%) higher than budget of \$82.3m. Variance to budget by revenue classification is reflected in the following graph.

7.1 P12 Indicative Financial Report to June 2024(Cont.)

Indicative Sources of Operating Funding vs Budget (Q4 2024)



Fees and Charges are less than budget overall (3.2%), partially impacted by the delay in the commencement of fees and charges implementation for 2024. As outlined throughout the financial year there are some significant variances at an activity level particularly across compliance activities; Building Inspection, Animal Control and Parking Enforcement which all report below budget. Aquatic Centres fees and charges also report a below budget result.

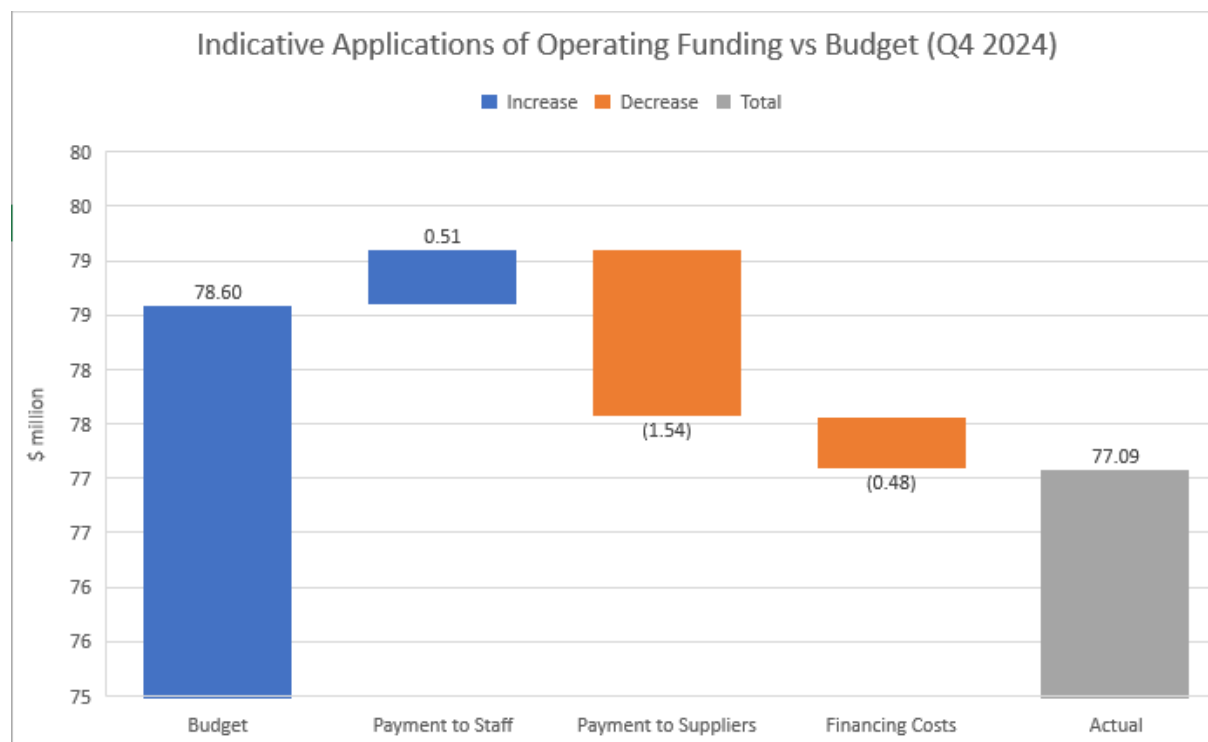
Trade Waste and Waste Management fees are higher than budget, noting that Trade Waste fees have been accrued, so may change, as final invoicing has not been processed at the time of preparing this report.

Subsidy revenue for Operating purposes is \$158k higher than budget, whilst within range of budget overall there are some significant activity variances as reflected in the following table:

| Significant Operating Subsidy Variances as at 30 June 2024 | Actual YTD \$'000 | Budget Full Year \$'000 | Variance YTD \$'000 | Comment |
|--|-------------------|-------------------------|---------------------|--|
| Transportation Connections | 6,200 | 4,933 | 1,267 | 2024 Annual Plan understated, no confirmation of subsidy to cover additional inflationary expenditure from Waka Koti at the time of budget adoption. |
| Tourism Development Plan | 267 | 595 | (328) | Timing, funded by MBIE |
| Spatial Plan | 540 | - | 540 | Additional Subsidy received from KDC, ODC & BOPRC |
| Waste Management and Minimisation | 658 | 253 | 405 | Over budget subsidy received from MFE for Waste Levy Funding |
| Parks and Reserves | 105 | - | 105 | Unbudgeted subsidy received from MBIE for Responsible Camping |
| Three Water Transition | - | 620 | (620) | No subsidy received, change of government |
| Better Off Funded Projects | 392 | 1,600 | (1,208) | Timing, predominantly Iwi Hub and Southern Districts Regeneration projects |
| Other minor variances consolidated | 370 | 373 | (3) | |
| Total Operating Subsidies | 8,532 | 8,374 | 158 | |

7.1 P12 Indicative Financial Report to June 2024(Cont.)

Operating Expenditure (Applications of Operating Funding) of \$77m is \$1.5m (2%) lower than budget of \$78.6m, which is \$531k more than Q3 forecasts. Actual expenditure classification is reflected in the following graph.



Payments to Staff at \$27.6m is \$0.5m (1.9%) over budget of \$27.1m. The variance is largely owing to the budgeted vacancy factor of 5% being higher than the actual rate as the market has tightened since the setting of the 2024 budget. Also contributing is the revaluation of long service and sick leave provisions (\$103k).

Payment to Suppliers is less than budget by \$1.5m (3.6%); most of this variance is related to operational projects that are behind schedule, in particular Better Off Funded projects (\$1.2m), Strategy and Futures projects (\$0.5m) and the Three Water Transition project (\$1m).

Offsetting the below budget project expenditure are some expenditure items reporting over budget schedule as outlined below:

- Recoverable expenses (Building and Resource Consent); \$248k overbudget, this expenditure has almost entirely been recovered through revenue.
- Legal/Litigation expenses \$363k over budget; predominantly in the Resource Consent and Transportation activities.
- Insurance \$335k (21%) overbudget, owing to higher than budgeted premiums.
- Rates on WDC properties \$180k higher than budget; reflecting impact of revaluation particularly in Water activity, and rates budget not adjusted for additional 2.5% increase for 2024 AP (from LTP).
- Chemical costs \$229k are significantly over budget mostly relating to the Braemar Water Supply (LTP budgets have been adjusted to recognise this additional cost)
- Vandalism cost of \$70k have been incurred predominantly at Public Conveniences.

7.1 P12 Indicative Financial Report to June 2024(Cont.)

4.3. CAPITAL PERFORMANCE

4.3.1. Sources of Capital Funding are \$19m which is \$10.6m less than budget of \$29.6m.

Capital Subsidies are significantly under budget (\$10.3m) with the variance relating to timing of projects; Better Off Funded Projects (\$1.4m), transport (\$5.5m) with \$2.9m funding withdrawn following change of government, Matata Wastewater subsidy (\$2.8m) and the Local Organic Waste project (\$0.4m) year.

4.3.2. Applications of Capital Funding are \$46m which is \$43m less than budget of \$89m.

This variance is related to the timing of capital expenditure, project scope changes and some unbudgeted items such as storm damage. Actual capital expenditure for 2024 is \$3.7m less than Q3 forecasts predominantly related to project timing.

Significant timing differences are reflected in the table below:

| Capital Expenditure by Group of Activity as at 30 June 2024 | Actual YTD \$000 | Budget Full Year \$000 | Variance YTD \$000 | Comment |
|---|------------------|------------------------|--------------------|---|
| Community Experience | 3,942 | 8,838 | 4,896 | Mitchell Park Projects (\$0.5m), BOF Projects (\$0.6m), New Cemetery (\$1.07m), Awatapu Lagoon Wetland Construction (\$0.4m) |
| Community Safety | 176 | 660 | 485 | BOF Community Resilience project timing, anticipate carry forward and progression 2025 FY |
| Corporate & District Activities | 2,392 | 4,582 | 2,189 | ERP project (\$2m), rebudgeted in LTP and reclassified as opex |
| Council Controlled Activities | 110 | 1,538 | 1,428 | Airport Land Development project (\$1.2m) |
| Roads & Footpaths | 24,878 | 33,465 | 8,587 | Keopa Road Improvements (\$4m) rebudgeted in LTP, TCP projects not progressed (\$2.9m) after funding withdrawn following government change, Mimiha Bridge works timing (\$2m) |
| Strategy & Futures | 780 | 2,213 | 1,432 | Integration Floodwall and Buildings (\$1.3m) |
| Sewage Treatment & Disposal | 4,348 | 9,515 | 5,167 | Matatā Wastewater (\$2.8m), Whakatāne WW Treatment Plant upgrade (\$0.7m) |
| Stormwater Drainage | 3,655 | 11,142 | 7,487 | (40.85m) |
| Waste Management and Minimisation | 101 | 466 | 365 | Local Organic Waste Processing Plant not progressing |
| Water Supply | 5,555 | 16,842 | 11,287 | Backflow Preventors (\$1.9m), Murupara Treatment Upgrades (\$2.4m), Otumahi Water Storage (\$4.9m) |
| Total Capital Expenditure | 45,937 | 89,260 | 43,323 | |

Expenditure relating to some of the projects outlined above has been re-budgeted in the LTP (\$29.5m).

The increase of investments is the Council equity contribution to the Boat Harbour, this is below budget with no contribution made in the 2024 financial year.

4.3.3. Depreciation and Non-Operational Activities.

Depreciation: Depreciation of \$26.3m is \$1.7m (6%) less than budget of \$28m. Many of the Council owned assets went through Fair Value Assessments or full valuations during the 2023 financial year. Together with some capital projects not progressing in 2023, this has resulted in some activity variances. This combined with the lower application of capital funding detailed above results on the depreciation variance. As the capitalisation of assets is not complete at the time of preparing this report there will be some additional depreciation expense posted for 2024.

Gain/Loss on Derivatives: An overall loss on derivatives of \$0.61m is reported to the end of June (Q3 forecast \$272k Gain). As older derivatives have matured, derivatives have made losses.

7.1 P12 Indicative Financial Report to June 2024(Cont.)

4.4. SUNDRY ACCOUNTS RECEIVABLE (NON-RATES) as at 30 June 2024

| Sundry Accounts Receivable (non-rates) as at 30 June 2024 | | | | | | |
|---|---------------------|------------------|------------------|---------------------|---------------------|---------------------|
| Activity | Current | Overdue 30 days | Overdue 60 days | Overdue 90+ days | Total June 2024 | Total June 2023 |
| Airport | 42,127.00 | - | - | 1,549,203.62 | 1,591,330.62 | 202,268.27 |
| Animals | - | - | - | 10,255.95 | 10,255.95 | 25,709.11 |
| Building Consents | 84,547.69 | 3,024.84 | 3,371.48 | 36,062.77 | 127,006.78 | 135,591.79 |
| Refuse Transfer Station | 160,910.23 | 13,544.31 | 25,439.44 | 76,024.93 | 275,918.91 | 124,490.38 |
| Halls | 15,108.96 | 7,710.00 | (205.00) | 697.34 | 23,311.30 | 20,260.71 |
| Harbour Ground Lease | 704,217.13 | 2,525.56 | 10,085.83 | 21,236.41 | 738,064.93 | 328,201.90 |
| Leases/Rental (non Harbour) | 67,566.73 | 8,596.45 | (135.10) | 8,245.78 | 84,273.86 | 86,801.18 |
| Licences | 14,558.84 | (1,374.55) | 610.00 | 31,416.45 | 45,210.74 | 80,429.82 |
| Resource Consents | 56,207.18 | (1,150.00) | (3,450.69) | 178,210.62 | 229,817.11 | 213,208.01 |
| Roading | 9,428.48 | 5,176.00 | 6,590.98 | 58,910.82 | 80,106.28 | 287,991.33 |
| Sundry debtors | 235,427.89 | (219.87) | 4,435.00 | 26,012.59 | 265,655.61 | 366,081.73 |
| Trade Waste | 53,553.28 | (155.00) | 848.74 | 24,419.87 | 78,666.89 | 16,041.74 |
| Aquatic Centre | 10,774.95 | 213.88 | 2,948.80 | 3,982.50 | 17,920.13 | 20,477.88 |
| Moorings/Hardstand/Berthage | 37,469.07 | 8,682.50 | 8,027.05 | (323.43) | 53,855.19 | 37,408.09 |
| Liquor Licensing | 1,710.00 | - | - | 151.40 | 1,861.40 | 1,640.45 |
| Cemetery | 40,840.00 | 9,320.00 | 1,835.00 | 1,095.43 | 53,090.43 | 39,583.43 |
| Total | 1,534,447.43 | 55,894.12 | 60,401.53 | 2,025,603.05 | 3,676,346.13 | 1,986,185.82 |
| | 42% | 2% | 2% | 55% | 100% | 100% |

* Sundry debtors include sponsorship invoicing, invoicing for pest control, invoicing to recover costs, and other invoicing that does not fit under other categories (including sand extraction, boat harbour project and venue hire).



4.4.1. Explanation of Graph – How are debt levels tracking between this year and last year?

- Total debt for June 2024 has increased by \$1.6M compared with June 2023. The majority of the increase is due to the \$1.3m of invoices being raised for the Ministry of Transport's contribution to the Whakatāne Airport. This includes both 50% contribution for losses and 50% contribution for capital investments for the financial years 2020 - 2023.
- Harbour Leases have increased by \$400K in June 2024 compared with the same period last year. This is due to the timing of Harbour Lease invoicing.
- 90-day debt for June 2024 has increased by 19% (2024:55%; 2023:36%). However, the figure for 2024 includes the invoices for the Whakatāne Airport. Taking out the Airport, 90-day debt has reduced by approximately \$240K compared with June 2023.
- 90-day debt in 2024 has increased for Resource Consents by \$41K. This is because we are waiting on legal decisions relating to some consents. There has also been an increase of \$51K for Refuse Transfer Station due to an overdue debt. This is being actively managed by the accounts team. 90-day debt has decreased for all other categories compared with June 2023.

7.1 P12 Indicative Financial Report to June 2024(Cont.)

4.5. RATES DEBTORS

Please note that we are currently completing the annual analysis of rates and rates debtors for presentation at the Finance and Performance Committee as requested as an action from the March 2024 Risk and Performance Committee. This will be incorporated into this report as Appendix 1. As it is still reliant on additional information being source we will table it at the committee meeting.

4.5.1. Total Land Rates Debt

The total land rates debt as at 30 June 2024 is \$8.21 million (30 June 2023: \$7.49 million).

The percentage of invoiced rates collected for the 2024 financial year as at 30 June is 96.8%, this compares to 97.23% collection at the same time last year.

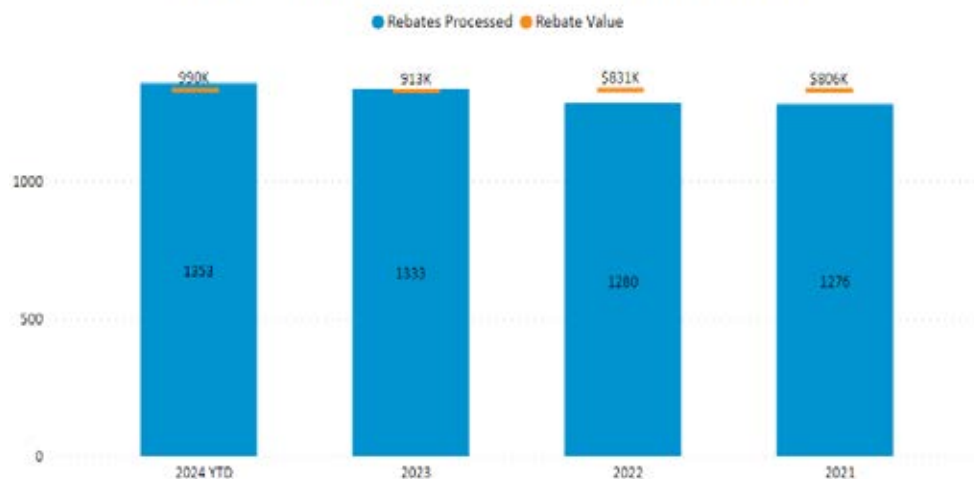
The percentage of quarterly rates invoicing collected at the reporting date is shown in the following table:

| Percentage Collected | 2023 | 2023 | 2022 |
|-----------------------|--------|--------|--------|
| Q1 as at 30 September | 94.76% | 95.74% | 95.30% |
| Q2 as at 31 December | 96.05% | 96.48% | 96.69% |
| Q3 as at 31 March | 96.57% | 96.86% | 96.94% |
| Q4 as at 30 June | 96.80% | 97.23% | 97.28% |

4.5.2. Rates Rebates

 **Rates Rebates, Email opt-ins and Direct Debits**

Rates Rebates Processed 2021-2024



7.1 P12 Indicative Financial Report to June 2024(Cont.)

Rates rebates processed to the end of June has increased 1.5% (1,353) in comparison to last year (1,333). The Rates team continue to encourage low-income ratepayers to submit applications to check if they qualify for the rebate of up to \$750. Reminders were sent with application forms for customers who claimed last year but not so far this year alongside a social media push and Ko Konei to help raise awareness before the end of the financial year.

5. Options analysis - Ngā Kōwhiringa

No options have been identified relating to the matters of this report.

6. Significance and Engagement Assessment - Aromatawai Pāhekoheko**6.1. Assessment of Significance**

The recommendations of this report are assessed to be of low significance in accordance with the Council's Significance and Engagement Policy.

6.2. Engagement and community views

Due to the low significance of the matters of this report, public participation is not required to inform decision-making, as set out in Section 6.1(a) of the Council's Significance and Engagement Policy.

7. Considerations - Whai Whakaaro**7.1. Financial/budget considerations**

There are no budget considerations associated with the recommendations of this report other than as addressed within the analysis.

7.2. Strategic alignment

This report serves to assure council that financial performance is in alignment with the 2023-24 Annual Plan in support organisational strategies.

7.3. Climate change assessment

The matters of this specific report do not have an impact on the District biodiversity and ecology.

Based on this assessment, the decisions and matters of this report are assessed to have low climate change implications and considerations, in accordance with the Council's Climate Change Principles.

7.4. Risks

The ratios in comparison to policy and debenture trust deed requirements demonstrate that the loan portfolio is low risk and is comfortably within all ratio requirements.

Attached to this report:

Appendix 1 - 2023/24 Year End Rates and Rates Debtors Analysis report.

(This appendix will be tabled at the meeting dated Thursday, 29 August 2024).

7.1.1 Appendix 1 - 2023/24 Year End Rates and Rates Debtors Analysis report.

7.1.1 Appendix 1 - 2023/24 Year End Rates and Rates Debtors Analysis report.

Appendix 1 - 2023/24 Year End Rates and Rates Debtors Analysis Report will be tabled at the Finance and Performance meeting dated Thursday, 29 August 2024

7.2 Capital and Operating budgets proposed to carry forward to 2025 (LTP2034 Year 1)

7.2 Capital and Operating budgets proposed to carry forward to 2025 (LTP2034 Year 1)



To: **Finance and Performance Committee**

Date: **Thursday, 29 August 2024**

Author: **G Connolly / CFO and GM Business Partnering**

Authoriser: **D Bewley / Acting Chief Executive**

Reference: **A2731494**

1. Capital and Operating budgets proposed to carry forward to 2025 (LTP2034 Year 1)

2. Reason for the report - *Te Take mō tēnei rīpoata*

The purpose of this report is to seek approval from the Finance and Performance Committee for the carry forward of unspent 2023/24 capital and operating expenditure budgets for incorporation into year 1 of the Long Term Plan, resulting in a Revised Budget for performance measurement for the 2024/25 year.

3. Recommendation/Actions - *Tohutohu akiaki*

1. THAT the Finance and Performance Committee **approves** the carry forward of unspent capital expenditure budgets related to major projects into the 2024/25 financial year (appendix 1), totalling \$7.74 million, including associated subsidies where applicable.
2. THAT the Finance and Performance Committee **approves** the carry forward of unspent capital expenditure budgets related to other projects and general renewals into the 2024/25 financial year (appendix 2), totalling \$2.57 million, including associated subsidies where applicable.
3. THAT the Finance and Performance Committee **approves** the carry forward of unspent operational project budgets into the 2024/25 financial year (appendix 3), totalling \$1.61 million, including associated subsidies where applicable.
4. THAT the Finance and Performance Committee **notes** the release of unspent capital expenditure budgets related to major projects totalling \$665 thousand, as detailed in Appendix 4. These projects, while strategically important, currently lack sufficient clarity or certainty to be included in the 2024/25 carry forward. They will be considered for re-budgeting and submitted for approval once a reasonable level of certainty regarding their timelines is achieved.
5. THAT the Finance and Performance Committee **endorses** the carry forward of unspent capital expenditure budgets of \$425 thousand associated with the CCO Whakatāne Airport into the 2024/25 financial year (appendix 5).

7.2 Capital and Operating budgets proposed to carry forward to 2025 (LTP2034 Year 1)(Cont.)**4. Background - *He tirohanga whakamuri***

As part of the year-end process for 2023/24, it has been identified that some capital and operational projects, or portions thereof, while budgeted and/or initiated in 2023/24, have not yet reached completion or commenced.

Given the significance of these projects to our long-term goals, it is essential to carry forward the unspent capital and operational budgets into the 2024/25 financial year. This carry forward will ensure that these projects have the necessary funding, with appropriate delegated authority, to achieve their intended outcomes without compromising the overall financial integrity of the Long Term Plan (LTP).

By incorporating these unspent budgets into the first year of the new planning cycle, we can maintain momentum on critical initiatives, align with revised timelines, and provide clarity and transparency in our performance measurement for the upcoming year.

There are also some strategically important projects, previously budgeted, for which we do not yet have sufficient clarity or certainty that they will occur within the next 12 months. As such, we do not recommend including these projects in the carry forward into 2024/25 at this time. Instead, we propose noting these projects as placeholders. Once there is a greater level of certainty regarding their timelines, we will submit them for approval to the Committee or Council for re-budgeting, in line with the appropriate delegations.

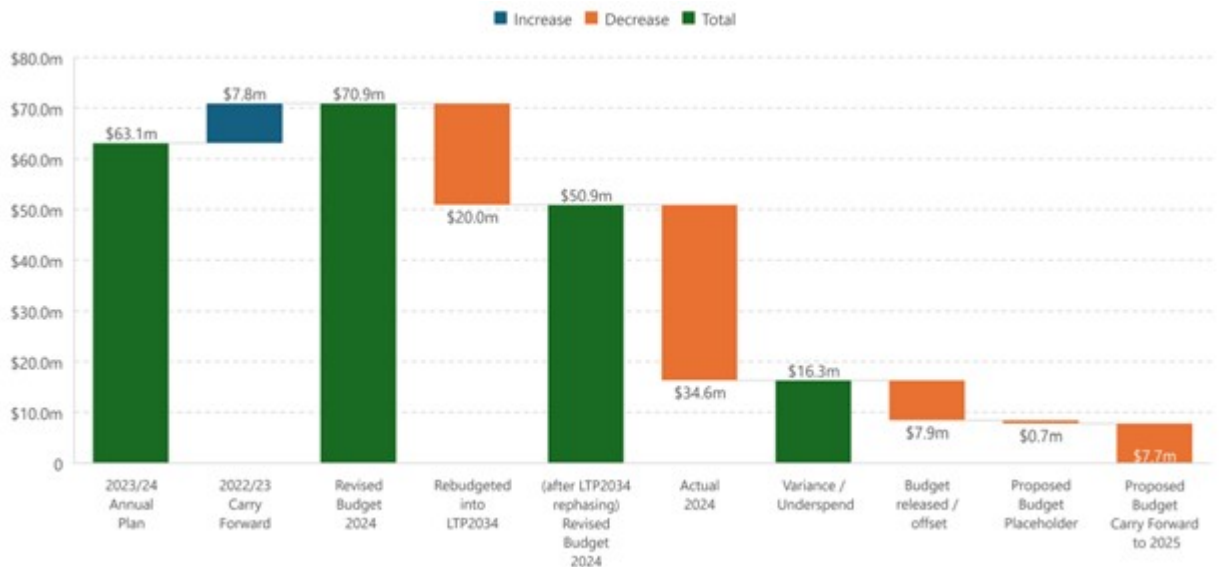
5. Issue/subject – Kaupapa**5.1. Capital Expenditure Projects to Carry Forward to 2024/25****5.1.1. Major Projects**

The major capital projects in this group are identified as improvement projects or more significant renewal project, strategic initiatives that are crucial for the long-term development and sustainability of our infrastructure and organisational delivery.

Chart 1 below identifies that against the revised budget after transfer to Long Term Plan 2034 we incurred \$34.6 million (68%) of budget spend to project completion of expenditure to date. Carry forward requested to enable continued delivery of these projects within delegation in 2024/25 is \$7.74 million as identified in appendix 1.

Chart 1:

7.2 Capital and Operating budgets proposed to carry forward to 2025 (LTP2034 Year 1)(Cont.)

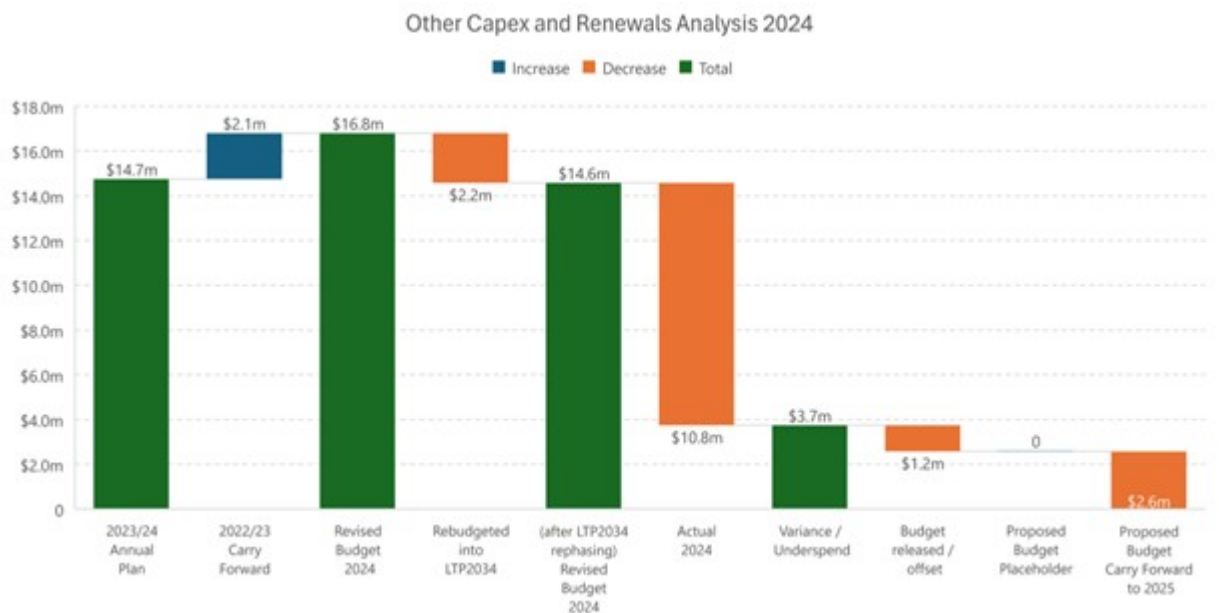


5.1.2. Other Projects and Renewals

This section includes other capital projects and renewals that, while not classified as major, are still essential for maintaining and upgrading our existing infrastructure. These projects also had budgets in 2023/24, with some supplemented by carry forwards from 2022/23. However, like the major projects, some of these funds remain unspent.

Chart 2 outlines the budget details for these other projects and renewals, showing the original budget, carry forwards, actual expenditure, and the requested carry forward into 2024/25 totalling \$2.57 million and as detailed in appendix 2.

Chart 2:



7.2 Capital and Operating budgets proposed to carry forward to 2025 (LTP2034 Year 1)(Cont.)

5.2. Operational Expenditure Projects to Carry Forward to 2024/25

The operational expenditure projects in this group are vital for supporting the ongoing functions and services of our organisation, and to a greater extent are supported by third party subsidies including the Better Off Funding. The amounts requested for carry forward into 2024/25 as detailed in appendix 3 is \$1.61 million.

5.3. Placeholder Projects

Incorporated in 4.1.1 above, there are strategically important capital projects for which there is not yet sufficient clarity or certainty to include them in the 2024/25 carry forward. We recommend that these projects be noted as placeholders, with their budgets released until more information is available, while noting they are anticipated to be submitted to the Council for approval to rebudget in the future once more certainty is available. These budgets totalling \$665 thousand from 2023/24 are detailed in appendix 4.

5.4. Whakatāne Airport

As a CCO Whakatāne Airport is not directly included in the Whakatāne District Council performance measurement framework and is subject to appropriate delegations' and approval frameworks agreed with its JV partner, Ministry of Transport. Though not specifically including in the performance measurement it is incorporated in many internal processes therefore the proposal to carry forward unbudgeted capex budgets of \$m and operational projects budgets of \$425 thousand is also presented in this report in appendix 5 for endorsement from the Finance and Performance Committee.

6. Options analysis - *Ngā Kōwhiringa*

Option 1: Approve Full Carry Forward [Recommended]

The Committee may approve the full carry forward of all unspent 2023/24 capital and operational expenditure budgets, proposed by management, into the 2024/25 financial year. This option ensures continuity and adequate funding for ongoing projects, enabling alignment with long-term strategic goals.

Option 2: Selective Carry Forward

The Committee may opt to approve the carry forward of only selected projects that have a high level of certainty and strategic importance. This option may impact on maintenance of existing commitments and expectation of outcomes .

Option 3 : No Carry Forward

The Committee may choose not to approve any carry forward of unspent budgets. This would result in the release of all unspent funds, potentially impacting the completion and success of ongoing projects and their alignment with long-term objectives.

Each option carries implications for the organisation's financial planning and project delivery in the upcoming year. The recommended approach balances the need to maintain momentum on critical initiatives while managing uncertainties surrounding certain projects.

7.2.1 Appendix 1 – Capital Expenditure Projects to Carry Forward to 2024/25 - Major Projects

7. Significance and Engagement Assessment - *Aromatawai Pāhekoheko*

7.1. Assessment of Significance

The recommendations of this report are assessed to be of low significance in accordance with the Council's Significance and Engagement Policy.

7.2. Engagement and community views

Due to the low significance of the matters of this report, public participation is not required to inform decision-making, as set out in Section 6.1(a) of the Council's Significance and Engagement Policy.

8. Considerations - *Whai Whakaaro*

8.1. Financial/budget considerations

There are no budget considerations associated with the recommendations of this report other than as addressed withing the analysis.

8.2. Strategic alignment

This report serves to assure council that all loans are within policy limits and required debenture trust deed ratios.

8.3. Climate change assessment

The matters of this specific report do not have an impact on the district biodiversity and ecology.

Based on this assessment, the decisions and matters of this report are assessed to have low climate change implications and considerations, in accordance with the Council's Climate Change Principles.

8.4. Risks

The ratios in comparison to policy and debenture trust deed requirements demonstrate that the loan portfolio is low risk and is comfortably within all ratio requirements.

Attached to this report:

- Appendix 1 – Capital Expenditure Projects to Carry Forward to 2024/25 - Major Projects
- Appendix 2 – Capital Expenditure Projects to Carry Forward to 2024/25 - Other Projects and general renewals
- Appendix 3 - Operating Expenditure Projects to Carry Forward to 2024/25
- Appendix 4 - Placeholder Projects
- Appendix 5 – CCO Whakatāne Airport Carry Forward to 2024/25
- Appendix 6 – Schedule of major budget under and overages based on proposal

7.2.1 Appendix 1 – Capital Expenditure Projects to Carry Forward to 2024/25 - Major Projects

7.2.1 Appendix 1 – Capital Expenditure Projects to Carry Forward to 2024/25 - Major Projects(Cont.)

Appendix 1 – Capital Expenditure Projects to Carry Forward to 2024/25 - Major Projects

| Project | Project Description | (after LTP2034 Rephasing) Revised Budget 2024 | Actual 2024 | Variance / Underspend | Proposed Budget Carry Forward to 2025 | Revised Budget 2025 |
|------------------------------------|--------------------------------|--|-------------|-----------------------|---------------------------------------|---------------------|
| Emergency Management | | | | | | |
| S61101 | BOF Emcy Mgt Comm Resilience | 638,707 | 175,546 | 463,160 | 463,160 | 463,160 |
| Aquatic Centres | | | | | | |
| C21102 | WhkAquatic NewOffice&TrngSpace | 150,000 | 93,813 | 56,187 | 56,187 | 56,187 |
| C21103 | WhkAquatic NewPoolWWtoSewage | | | | | |
| C21155 | Murupara Aquatic Centre Renewa | 27,170 | - | 27,170 | 27,170 | 106,197 |
| Libraries and Galleries | | | | | | |
| A11162 | BOF-Hono Hapori Cmnty Outreach | 446,107 | 212,681 | 233,426 | 287,319 | 287,319 |
| Halls | | | | | | |
| P15151 | BOF-EQHalls-Enhance Resilience | 755,561 | 425,564 | 329,997 | 329,997 | 329,997 |
| Corporate Property | | | | | | |
| Y93130 | BOF - CCTV Upgrade Enhance | 718,868 | 637,168 | 81,700 | 81,700 | 81,700 |
| Parks, Reserves and Gardens | | | | | | |
| C11139 | MitchellPark MktSpace Drainage | 50,000 | - | 50,000 | 50,000 | 50,000 |
| C11140 | MitchellPk MktSpace L/ScapShad | 150,000 | - | 150,000 | 150,000 | 150,000 |
| C11141 | MitchellPark MktSpace Toilets | 300,000 | - | 300,000 | 300,000 | 300,000 |
| C11297 | Ohope Westend Toi stairway | 86,603 | 19,903 | 66,700 | 66,700 | 66,700 |
| Cemeteries | | | | | | |
| C15157 | Cemeteries Renewals - Cremator | 18,476 | 7,388 | 11,087 | 10,000 | 16,954 |
| Stormwater Drainage | | | | | | |
| 310009 | Whk SW WesternCatch UpgradeRen | 2,000,000 | 1,686,944 | 313,056 | 313,056 | 2,617,955 |
| 310019 | Apanui Linear Park | 1,956,850 | 1,104,513 | 852,337 | 300,000 | 300,000 |
| 310125 | WHK SW Pump Replacements | 622,001 | 47,371 | 574,629 | 574,629 | 2,748,128 |
| 311016 | OHOPE SW Upgrades | 311,978 | 174,124 | 137,854 | 137,854 | 137,854 |
| Wastewater | | | | | | |
| 510090 | WHK WW - Rising Main Renewal | 579,887 | 4,633 | 575,254 | 575,254 | 575,254 |
| Water Supply | | | | | | |
| 410028 | EQ Water Network Renewals | 2,200,000 | 1,799,933 | 400,067 | 400,067 | 2,722,408 |
| 410039 | WHK W Backflow Preventors | 500,000 | 8,137 | 491,863 | 491,863 | 681,383 |
| 413060 | Taneatua WTP Access Track | 300,000 | 48,812 | 251,187 | 50,000 | 50,000 |
| 414557 | Plains W Backflow Preventors | 700,000 | 7,136 | 692,864 | 692,864 | 1,267,017 |
| 417002 | Otumahi Water Storage | 2,483,193 | 586,567 | 1,896,626 | 1,896,626 | 4,896,626 |
| Ports and Harbours | | | | | | |
| C23116 | Wharfside Fire&Safety Upgrade | 40,000 | - | 40,000 | 40,000 | 40,000 |
| C23118 | Wharfside Landscaping & Shade | 100,000 | - | 100,000 | 100,000 | 100,000 |
| C23119 | Wharfside Toilets | 350,000 | - | 350,000 | 350,000 | 350,000 |

7,744,447

7.2.2 Appendix 2 – Capital Expenditure Projects to Carry Forward to 202425 - Other Projects and general renewals

7.2.2 Appendix 2 – Capital Expenditure Projects to Carry Forward to 202425 - Other Projects and general renewals

Finance and Performance Committee - AGENDA

7.2.2 Appendix 2 – Capital Expenditure Projects to Carry Forward to 2024/25 - Other Projects and general renewals(Cont.)

Appendix 2 – Capital Expenditure Projects to Carry Forward to 2024/25 - Other Projects and general renewals

| Project | Project Description | (after LTP2034 Rephasing) Revised Budget 2024 | Actual 2024 | Variance / Underspend | Proposed Budget Carry Forward to 2025 | Revised Budget 2025 |
|-------------------------------|--------------------------------|--|----------------|--------------------------|---|------------------------|
| Strategic Property | | | | | | |
| E13001 | Harbour Owned Comm Blgs | 35,106 | - | 35,106 | 35,106 | 105,744 |
| Aquatic Centres | | | | | | |
| C21501 | Renewals Murupara Aquatic Cent | 15,215 | 637 | 14,578 | 14,000 | 14,000 |
| Whakatāne Holiday Park | | | | | | |
| C37005 | Holiday Park - Renewals | 180,000 | 94,696 | 85,304 | 40,000 | 145,369 |
| Stormwater Drainage | | | | | | |
| 310012 | Electrical & minor replacement | 79,149 | 1,834 | 77,316 | 70,000 | 70,000 |
| 310123 | WHK SW - Pipe Upgrades | 881,744 | 232,731 | 649,013 | 649,013 | 649,013 |
| 310097 | Ohope SW modelling for RC | 40,000 | 80 | 39,920 | 39,920 | 39,920 |
| 311203 | Ohp Compre SW Consents & Upgrd | 82,320 | - | 82,320 | 82,320 | 82,320 |
| 311204 | Ohp CAP Upgrd Compre MGMT Plan | 83,865 | - | 83,865 | 83,865 | 83,865 |
| 311404 | Edge Compre SW Consent & Upgrd | 33,546 | - | 33,546 | 33,546 | 33,546 |
| 313004 | Tane Compre SW Consent & Upgrd | 72,683 | 9,651 | 63,032 | 63,032 | 63,032 |
| Wastewater | | | | | | |
| 510017 | 3WR32 Swg Pmpstn Upgr Pohutu | 74,777 | 3,240 | 71,536 | 71,536 | 71,536 |
| 510089 | WHK WW - Upgrade WW Treatmt Pl | 900,000 | 480,686 | 419,313 | 169,000 | 426,288 |
| 511008 | Ohope WW Asset risk & resilien | 31,310 | 79 | 31,230 | 31,230 | 31,230 |
| 511551 | EDG WW Rising Main Renewal | 294,087 | 3,706 | 290,381 | 158,835 | 158,835 |
| 511016 | Muru WW monitor renewal RC | 27,955 | 23,800 | 4,155 | 4,155 | 31,350 |
| 512504 | Muru WW Dischrg Rsrce Consents | 264,849 | 2,591 | 262,258 | 262,258 | 912,258 |
| 512555 | MRP WW Pipe,Manhole,Conn repla | 129,272 | - | 129,272 | 129,272 | 129,272 |
| 513008 | Tane WW Dischrg Rsrce Consnets | 111,820 | - | 111,820 | 111,820 | 111,820 |
| Water Supply | | | | | | |
| 410030 | Equalised W PS Renewals | 229,231 | 195,104 | 34,127 | 34,127 | 34,127 |
| 412054 | Matata Water Meters | 100,000 | - | 100,000 | 100,000 | 208,330 |
| 414559 | PLAINS W Sampling/Cond Assess | 7,827 | - | 7,827 | 7,827 | 7,827 |
| 417000 | 3WR1 Headworks - Otumahi 2nd | 247,692 | 28,907 | 218,786 | 218,786 | 218,786 |
| Ports and Harbours | | | | | | |
| C23115 | Tidal Pool Remediation | 187,638 | 37,606 | 150,031 | 150,031 | 150,031 |
| C23572 | Harbours Renewals - Navigation | 10,539 | - | 10,539 | 10,539 | 41,096 |

2,570,218

7.2.3 Appendix 3 - Operating Expenditure Projects to Carry Forward to 202425

7.2.3 Appendix 3 - Operating Expenditure Projects to Carry Forward to 202425

7.2.3 Appendix 3 - Operating Expenditure Projects to Carry Forward to 2024/25(Cont.)**Appendix 3 - Operating Expenditure Projects to Carry Forward to 2024/25**

| Project | Project Description | (after LTP2034 Rephasing) Revised Budget 2024 | Actual 2024 | Variance / Underspend | Proposed Budget Carry Forward to 2025 |
|-------------------------------------|--------------------------------------|--|----------------|--------------------------|---|
| Governance | | | | | |
| L10501 | BOF Collective Iwi Policy Hub | 349,973 | 177,712 | 172,261 | 172,261 |
| Safer Communities | | | | | |
| S50568 | Community Planning | 21,548 | - | 21,548 | 21,548 |
| S50576 | CommFunding Dev Business Case | 51,023 | 25,144 | 25,878 | 25,878 |
| Resource Management - Policy | | | | | |
| Y50027 | Review of Strategies changes | 77,674 | 66,879 | 10,795 | 10,795 |
| Y50043 | Landslide District Plan change | 200,000 | 4,070 | 195,930 | 195,930 |
| Y50045 | Minimum Floor Level Consenting | 100,000 | 47 | 99,953 | 99,953 |
| Y50046 | Spatial Plan/ Future Dev Strat | 215,480 | 553,550 | (338,070) | 201,930 |
| Y50050 | BOF (S.D.Regem) Murupara | 150,000 | - | 150,000 | 3,015 |
| Y50052 | BOF (S.D.Regem) Minginui | 150,000 | - | 150,000 | 3,015 |
| Strategic Property | | | | | |
| E10006 | Town Regeneration | 403,818 | 50,517 | 353,301 | 353,301 |
| E13046 | Proactive Property Development | 269,350 | 198,599 | 70,751 | 70,751 |
| Events and Tourism | | | | | |
| E20003 | Tourism Development Plan (MBIE) | 586,666 | 220,678 | 365,988 | 365,988 |
| Parks Reserves and Gardens | | | | | |
| C10020 | Onepu Forestry Block Pruning | 60,000 | 55,790 | 4,210 | 4,210 |
| C10021 | Valley Rd Pine Plantation Harvesting | 35,001 | 8,400 | 26,601 | 26,601 |
| Corporate Property | | | | | |
| Y92006 | BOF-CCTV Upgrade Expansion | 300,000 | 26,650 | 273,350 | 57,237 |

1,612,413

7.2.4 Appendix 4 - Placeholder Projects

7.2.4 Appendix 4 - Placeholder Projects

7.2.4 Appendix 4 - Placeholder Projects(Cont.)

Appendix 4 - Placeholder Projects

| Project | Project Description | (after LTP2034 Rephasing) Revised Budget 2024 | Actual 2024 | Variance / Underspend = Proposed Placeholder |
|--------------------------------------|------------------------------------|--|----------------|---|
| Strategic Property | | | | |
| E13004 | 60 Bunyan Rd Woodwaste Remediation | 177,886 | - | 177,886 |
| E13033 | Airport Land Purch. Law Family | 161,610 | - | 161,610 |
| E13047 | Esplanade Canopy Roof | 183,340 | - | 183,340 |
| Transport Network Connections | | | | |
| T35230 | BOF-Edge to Thorn Cycle Trail | 240,844 | 98,007 | 142,837 |
| | | | | 665,673 |

7.2.5 Appendix 5 – CCO Whakatāne Airport Carry Forward to 202425

7.2.5 Appendix 5 – CCO Whakatāne Airport Carry Forward to 202425

7.2.5 Appendix 5 – CCO Whakatāne Airport Carry Forward to 2024/25(Cont.)

Appendix 5 – CCO Whakatāne Airport Carry Forward to 2024/25

| Project | Project Description | (after LTP2034 Rephasing) Revised Budget 2024 | Actual 2024 | Variance / Underspend | Proposed Budget Carry Forward to 2025 | Revised Budget 2025 |
|---------|--------------------------------|--|----------------|--------------------------|---|------------------------|
| R11102 | Runway Lighting Nav Upgrade | 141,207 | 15,788 | 125,419 | - | 348,130 |
| R11127 | Runway Renewals | 47,039 | 3,121 | 43,918 | 43,918 | 136,374 |
| R11138 | Replacement of Windssock Strct | 50,000 | 23,151 | 26,849 | - | 53,405 |
| R11139 | Replacement P1 Security Gates | - | 8,037 | (8,037) | - | - |
| R11140 | Airport Land Redevelopment | 349,984 | 5,292 | 344,692 | 344,692 | 694,725 |
| R11141 | Airport Hardstand Upgrade | 39,884 | 3,620 | 36,265 | 36,265 | 36,265 |
| R11142 | Airport Fencing Renewals | 10,112 | 6,737 | 3,375 | - | 53,405 |
| R11143 | Airport CCTV Upgrade | 49,996 | 44,266 | 5,730 | - | 47,531 |
| R11145 | Terminal Renewals | - | - | - | - | 6,676 |
| | | | | | 424,875 | |

7.2.6 Appendix 6 – Schedule of major budget under and overages based on proposal

7.2.6 Appendix 6 – Schedule of major budget under and overages based on proposal

7.2.6 Appendix 6 – Schedule of major budget under and overages based on proposal(Cont.)

Appendix 6 – Schedule of major budget under and overages based on proposal

This incorporates budget offsets; capex spend budgeted by Council in year, and budget underspent and not proposed to be carried forward for items <> +/- \$200k

| Project | Project Description | Adjusted Revised Budget 2024 | Actual 2024 | Draft Recommended Critical Carry Forward | Released / (offset) | Total Proposed Revised Budget 2025 |
|---------|--------------------------------|------------------------------|-------------|--|---------------------|------------------------------------|
| E13052 | Purchase 144 The Strand | - | 446,822 | - | (446,822) | - |
| O61156 | Investigate ERP Replacement | 2,000,000 | - | - | 2,000,000 | - |
| Y93129 | Civic Centre Upgrd & Green Opt | - | 257,468 | - | (257,468) | - |
| T31437 | LR211 Unsealed Metalling | (167,966) | 1,000,430 | - | (1,168,396) | 767,965 |
| T31438 | LR212 Resurfacing-Chipseal | 2,620,002 | 2,869,599 | - | (249,597) | 4,486,028 |
| T31439 | LR212 Resurfacing- AC | 640,602 | 887,407 | - | (246,806) | 886,525 |
| T31442 | LR214 Pavement Rehab | 1,285,284 | 1,611,002 | - | (325,718) | 1,975,989 |
| T31468 | Jul 22 Permanent Reinstatement | 630,284 | 1,070,966 | - | (440,682) | - |
| T31485 | May 23Permanent Reinstatement | - | 329,870 | - | (329,870) | - |
| T31463 | LR341 LC/LR Active Whk | - | 239,155 | - | (239,155) | 268,094 |
| T31472 | LR341 - LRI - Peace Street Dra | 2,000,000 | 1,526,765 | - | 473,235 | - |
| T31484 | LR341 - RTZ - Peace McGarvey i | - | 455,677 | - | (455,677) | - |
| T31381 | TCP-Whk Riv Awatapu-CutllerSUP | 599,949 | - | - | 599,949 | - |
| T33438 | SPR212 Resurfacing-Chipseal | 414,725 | 12,340 | - | 402,385 | 245,663 |
| T33439 | SPR213 Drainage-Culverts | 271,030 | 8,025 | - | 263,005 | 143,126 |
| T33155 | SPR214 Pavement Rehab | 292,435 | 5,763 | - | 286,672 | 58,746 |
| T33160 | SPR216 Bridge Renewals | 1,758,273 | 3,146,001 | - | (1,387,728) | - |
| T33445 | SPR341 LC/LR Improv - Carriage | (1,848,031) | 13,950 | - | (1,861,981) | 2,428,864 |
| Z21176 | Local Organic Waste Process Pl | 403,190 | - | - | 403,190 | - |
| 310019 | Apanui Linear Park | 1,956,850 | 1,104,513 | 300,000 | 552,337 | 300,000 |
| 510057 | EQ Sewer Network Renewals | 882,401 | 1,414,373 | - | (531,972) | 1,446,774 |
| 510062 | WHK WW Discharge Rsrce Consent | (358,630) | 5,233 | - | (363,863) | 750,000 |
| 510089 | WHK WW - Upgrade WW Treatmt Pl | 900,000 | 480,686 | 169,000 | 250,313 | 426,288 |
| 512001 | Matata Waste Water Scheme | 2,568,531 | 867,639 | - | 1,700,892 | 1,133,255 |
| 410040 | Keepa Road Water Main | 200,000 | - | - | 200,000 | - |
| 412553 | Muru W Network Renewals | 133,452 | 376,322 | - | (242,870) | 228,438 |
| 413060 | Taneatua WTP Access Track | 300,000 | 48,812 | 50,000 | 201,187 | 50,000 |
| 413551 | Ruatoki Water Treatment | 355,005 | 130,718 | - | 224,287 | 1,355,005 |
| 414553 | 3WR26 Water Resilience Braemar | - | 203,818 | - | (203,818) | - |

7.3 Organisation Performance Report Quarter 4 2023/24

7.3 Organisation Performance Report Quarter 4 2023/24



To: **Finance and Performance Committee**
Date: **Thursday, 29 August 2024**
Author: **A Naidoo / Strategic Policy Analyst**
Authoriser: **L Woolsey / Manager Strategy and Performance**
Reference: **A2695532**

1. Reason for the report - *Te Take mō tēnei rīpoata*

The purpose of this report is to provide the Committee with the Organisation Performance Report for Quarter 4 of the 2023/24 financial year (1 April– 30 June 2024).

2. Recommendation - *Tohutohu akiaki*

THAT the Organisation Performance Q4 2023/24 Report be **received** by the Committee.

3. Background - *He tirohanga whakamuri*

The purpose of the report is to provide Council with an overview of how we are performing across a wide range of high-level measures including: service performance, financial performance, the Council's preparedness to meet current and future obligations, and the health of the organisation. The report provides a holistic view of performance across multiple indicators so that collective decisions can be made about where and how improvements can be progressed.

The four quadrants for the performance indicators in the Organisational Performance Report are:

- Service Performance: Focuses on the effectiveness, efficiency, and the quality of Council services.
- Financial Performance: Measures the soundness of financial management practices, trends, and forecasting abilities.
- Organisational Preparedness: The capacity of the organisation to meet current and future obligations as required.
- Organisational Health: Focuses on culture, leadership, staff, internal processes, and relationships.
- We note that this last Organisation Performance Report for the year, and there is an opportunity to refresh the formatting and presentation for the next financial year, and that might include any recommended changes to the Health and Safety audit and how Health and Safety is reported to the Committee.

4. Analysis

The report itself is a high-level overview of Council's performance.

7.3 Organisation Performance Report Quarter 4 2023/24(Cont.)

Across all performance measures Council is tracking in line with previous results.

The following highlights should be noted:

- We have a marked increase in our Cultural and Leadership People Survey Results, with consistent high results reflecting the positive way in which staff feel about our organisational culture;
- Preparedness initiatives in our Emergency Operations Centre, Māori Development Training, Cyber Security Training, and Energy Management Programmes have increased;
- Performance in processing of requests for service is high in terms of speed of response;
- Building and resource consent volumes are higher than in previous quarters;
- Year to date operating expenditure, fees and charges revenue, Debt as a proportion of Annual Plan forecast, and rates debtors variance percentages are lower than target;
- And 83% of the Council's Business Plan Programmes are on track or completed at the end of quarter 4.

5. Significance and Engagement Assessment - *Aromatawai Pāhekoheko*

5.1. Assessment of Significance

The decisions and matters within this report are assessed to be of low significance, in accordance with the Council's Significance and Engagement Policy.

5.2. Engagement and community views

Engagement on this matter is not being undertaken in accordance with Section 4.2 of the Council's Significance and Engagement Policy. This states that the Council will not consult when there is already a sound understanding of the views and preferences of the persons likely to be affected or interested in the matter.

6. Considerations - *Whai Whakaaro*

6.1. Financial/budget considerations

The recommendations of this Report do not have any financial implications.

6.2. Strategic alignment

No inconsistencies with any of the Council's policies or plans have been identified in relation to this report.

6.3. Climate change assessment

The decisions and matters of this report are assessed to have low climate change implications and considerations, in accordance with the Council's Climate Change Principles.

6.4. Risks

The committee should note measures that are tracking negatively.

Attached to this report:

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24

Appendix 1 - Organisation Performance Q4 Report 2023/24.

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

WHAKATĀNE DISTRICT COUNCIL

ORGANISATION PERFORMANCE REPORT Q4

Q4 2023/2024

1ST APRIL – 30 JUNE

Te Pūrongo Aroturukitanga Mahi a Te Kaunihera ā-rohe o Whakatāne Q4

Contents

| | |
|--|----|
| Purpose of the report..... | 2 |
| Organisation health measures..... | 4 |
| Service performance measures | 6 |
| Finance performance measures | 10 |
| Preparedness performance measures..... | 11 |
| Business Plan..... | 13 |
| How our measures are calculated..... | 19 |

WHAKATĀNE
District Council
Kia Whakatāne au i ahau

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Purpose of this Report

Te take o tēnei pūrongo

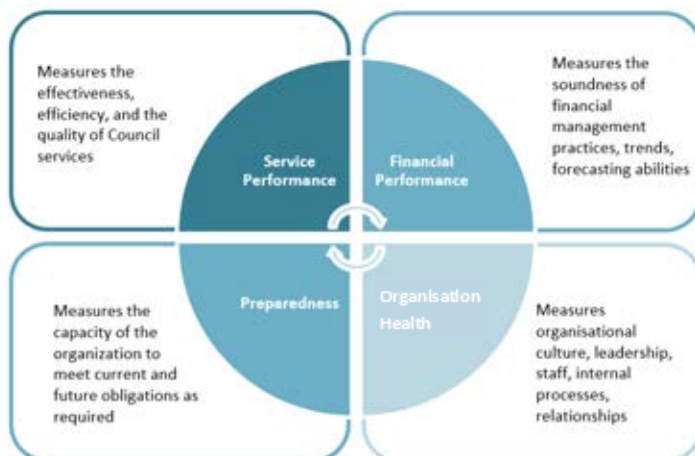
This Organisation Performance Report is a quarterly report presented to Council and covers quarter 4 of the 2023/24 financial year: 1 April – 31 June 2024.

The purpose of this report is to provide Council with an overview of how we are performing across a wide range of high-level measures including service performance, financial performance, the Council's preparedness to meet current and future obligations and the health of the organisation. This report provides a high-level holistic view of performance, so that collective decisions can be made about where and how improvements can be progressed. More detailed information on the measures of performance can be found in specific topic-based reports provided to the Council regularly.

Performance Measurement Themes

Ngā Kaupapa inenga mahi

The performance measures have been categorised into four themes, outlined below.



7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Quarterly Summary

Organisation Health

Cultural and Leadership People Survey results provide a gauge on how staff feel about working at WDC. At 66%, the result for Q4 is similar to the Q3 result of 67% and is sitting just below target. Quarter 4 demonstrates a positive increase compared to the Local Government (LG) benchmark in the top culture questions: Celebrating achievements as a team, Council is a great place to work, Our people enjoy working for Whakatāne District Council.

Service Performance

Satisfaction with Council services for this quarter is sitting just below the national benchmark. The end of year Resident Satisfaction Survey resulted in three out of 15 LTP measures meeting target. Of the requests for service received in the second quarter, 95% were completed or scheduled, showing an increase from the previous quarter.

Financial Performance

Overall expenditure largely aligns with budget for the 2024 financial year. Project delivery is behind budget as signalled during the year. A number of capital projects are now anticipated to continue into the 2025 financial year; a number of projects have been rebudgeted in the LTP with some funds also anticipated to be requested as carry forwards. Fees and charges are less than budget at the close of the year (3.2%), with the main underbudget variances related to Aquatics and compliance activities (Resource Consents, Building, Animal Control, Parking). Predominant driver of other revenue under budget is capital subsidies, this is related to the timing of capital projects predominantly Better Off Funded and Transport projects. Net borrowings are \$135.9m compared to \$133.2m forecast, this is within 5% of forecast debt. Land Rate debt is \$8.21M at end of June 2024 (this debt relates to prior years as well). % of invoiced rates collected 96.8%

Preparedness Performance

The minimum requirement for a full EOC roster is 90 staff. There are over 90 staff available to roster in the WDC EOC, of which 61% (55 of 90) have completed intermediate level training.

Te Kahupapa (cultural capability framework) has been reviewed and a new suite of training options will be rolled out to staff in the new year. The new programme is designed to be trained in 'cohorts' that will lead selected participants through foundational steps of Te Tiriti, He Taura Here Tangata (Noho Marae), Te Puawaitanga o Te Reo (Te Reo classes), legislation and Settlements, engagement training and Haerenga to rōhe.

Business Plan

The Whakatāne District Council Business Plan Reporting provides an overview on progress against the Council's work programme as set out in the Council's Business Plan for the 2023-24 financial year. There are a total of 205 items listed in the Business Plan for the 2023-24 year; of these items, 83% are either completed or on track at the end of quarter 3. 24 item risks are brought forward for Council information.

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Organisation Health Measures

Ngā inenga hauora o te tōpūtanga

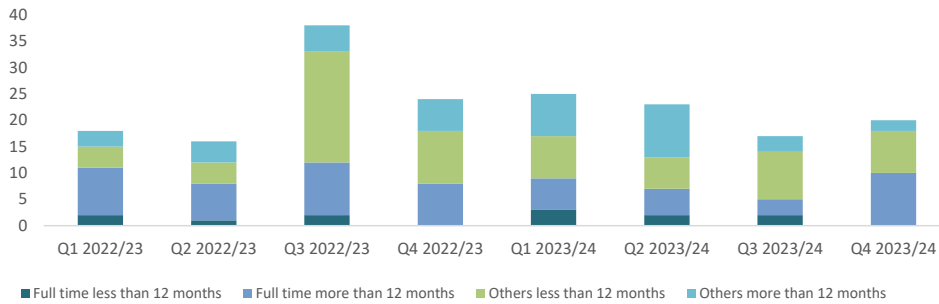
The following indicators give an overview of the organisational culture, leadership, staff, internal process, and relationships.

Employee count (as at 30 June 2024)

338 employees **-2.0%** vs previous quarter
 +3.4% vs previous year

255 full time permanent staff **+0.8%** vs previous quarter
 +7.6% vs previous year

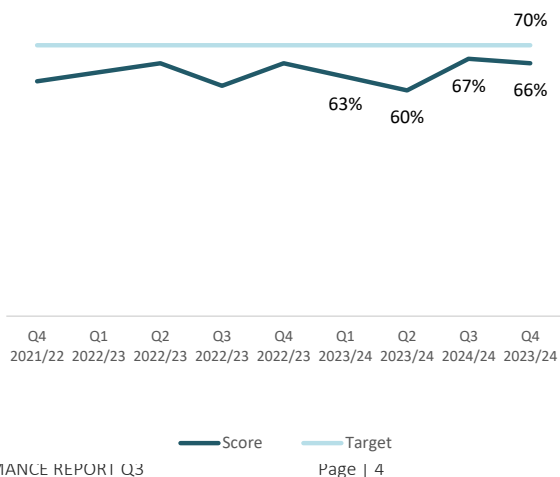
Staff turnover



During Quarter 4, 20 employees (5.92%) exited the organisation – 10 of these were full time permanent employees and the remaining 10 were part-time, fixed term and casual. This reflects reasonably steady turnover for the previous five quarters. Our rolling 12-month turnover of 12.52% (for full time, permanent staff) is below our 14% target. This is a positive indicator of our retention approaches.

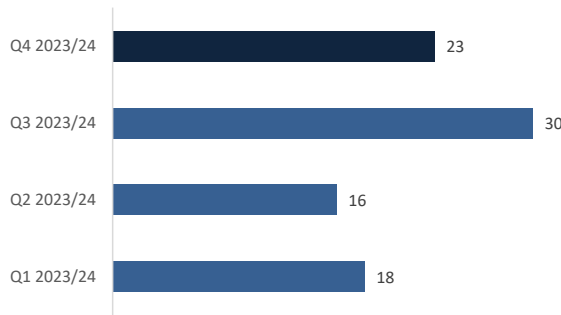
Cultural and Leadership people survey

The overall survey score remains in a positive space with a score of 66%, for this quarter with good participation shown with 61 employees completing the survey. Quarter 4 demonstrates a positive increase compared to the Local Government (LG) benchmark in the top culture questions: Celebrating achievements as a team, Council is a great place to work, Our people enjoy working for Whakatāne District Council. There is still work to be done in improving our performance management and remuneration structure. An updated Performance Management process will be rolled out in September 2024.



7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Number of staff accessing employee assistance programme services ¹



There has been a slight decrease in employees accessing the EAP service for this quarter.

Quarter 3 and 4 is the highest uptake of employees utilising the EAP service we have had over the past two years.

Health & Safety

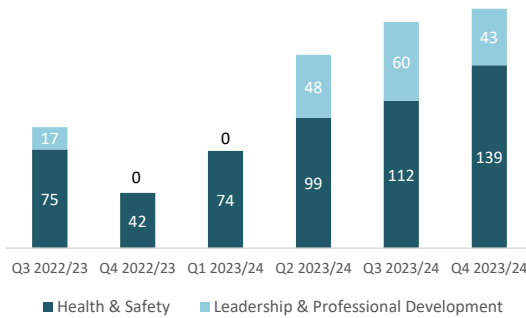
52 Health and safety incidents **8** Near misses **12** Injuries **32** Incidents

Additional information can be found in our Health and safety report.

Number of staff participating in development training

There are three ongoing leadership and professional development groups where 43 of our employees are growing their self-leadership, communicating powerfully, and reflecting on their career. By developing our people in their strengths and potential, reflect and increase the wider organisational productivity and effectiveness, benefiting Whakatāne District. Over Quarter 4 there has been a high volume of Health & Safety training delivered to operational Council employees and the largest volume of participants to date. The range of H&S training modules delivered include First Aid, Driver Training, Overlapping Duties, Grow Safe, and refresher modules. There were two training modules with substantial attendance of participants captured, these were:

- 30x employees – Workplace Health & Safety
- 32x employees – Situational Safety



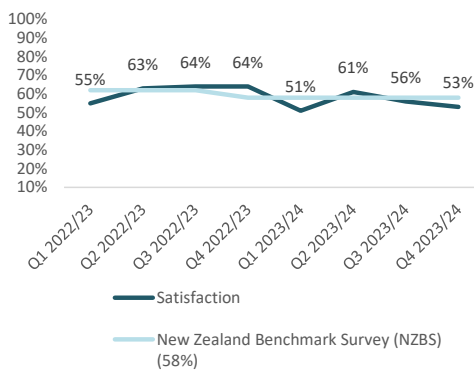
7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Service Performance Measures

Ngā inenga ratonga Kaunihera

The following indicators have been identified to measure the effectiveness, efficiency, and the quality of Council services.

Overall resident satisfaction with Council services

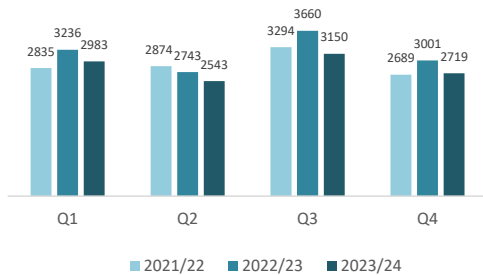


This quarter, we received an overall resident satisfaction result of 53%. Satisfaction had decreased from our Q3 result of 56% and is in line with trends seen in previous years.

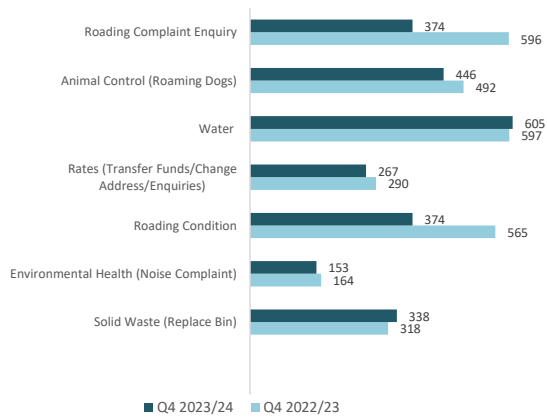
Within the Residents Satisfaction Survey for this quarter, three of 15 of Council’s Long-Term Plan targets were met which aligns with previous data. Please refer to the Residents Satisfaction Survey and Non-Financial Performance Measures for further information.

Target: Equal or above the NZ benchmark

Number of requests for service to customer service centre



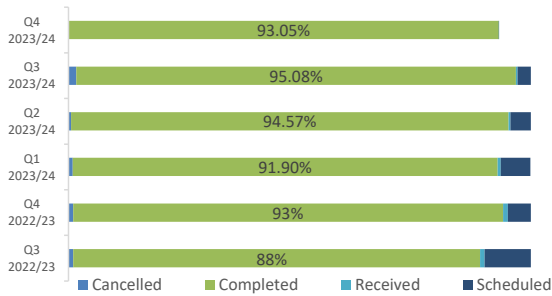
There were 282 fewer RFS’ logged in Q4 2024 than during the same period last year. This directly correlates with the decrease in phone calls over this time.



All subtypes (bar one) are in the top 8 this year as per the previous year. With last year being wet, and with increased weather events, there was a larger amount of Roading RFS logged in general in 2023 compared to 2024.

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Percentage of request for service completed



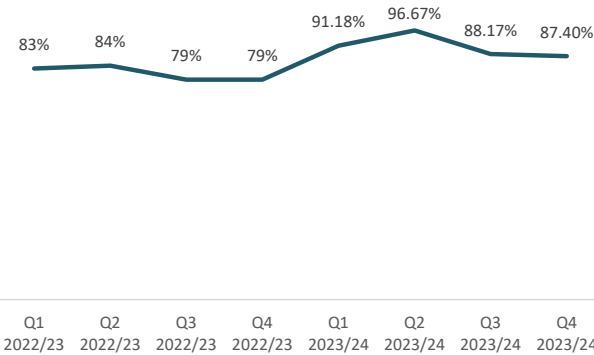
7,562 calls received by customer service

94% of calls answered within 30 secs Target: 85%

Of the 2,712 requests for services that were received this quarter, 93.1% of these have been completed or scheduled as of 12/07/24 when information extracted from Ozone.

Some RFS are sent to a 3rd party contractor for action, and therefore have been 'completed' within our systems. Target: 90% completed and scheduled

Percentage of building consents processed within statutory timeframes

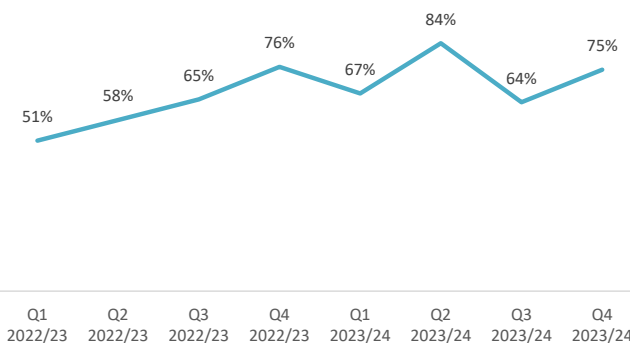


124 Building consents processed in Quarter 2023/24

91 same time last quarter

Target: 60%

Percentage of resource consents processed within statutory timeframes



44 Resource consents processed in Quarter 3 2023/24

39 same time last quarter

Target: 60%

The downturn is most likely attributable to uncertainty in the housing market, especially interest rates.

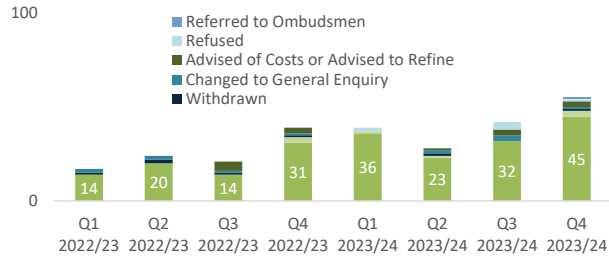
7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

LGOIMA Received

98%

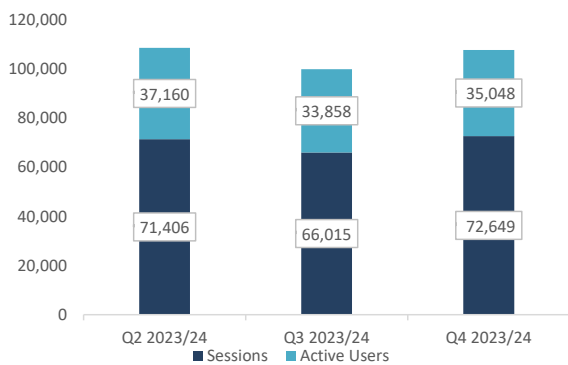
LGOIMA processed within 20 days (statutory timeframe)

Target: 100%



- 1 request was not processed within the statutory timeframe as it was lost in system, found, responded to and completed by the next day
- 1 Partially Refused, 1 Fully Refused
- Received advice with regard to a complaint that we did not meet statutory timeframes
- Provided information to the Office of the Ombudsman

Number of website page visits



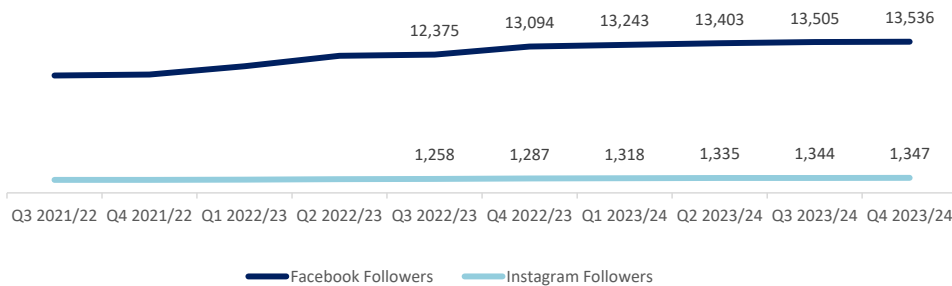
*Please note as of Q2 2023/24 website data is being reported differently; now categorised into Sessions and Active Users.

Reporting remains as New Zealand Traffic Only.

Sessions: A session is a period of time during which a user interacts with our website.

Active Users: The number of unique individuals who have engaged with our website within the specified timeframe (October 1 – 31 December 2023).

Number of followers on Facebook and Instagram



7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)**104** Campaigns delivered during Q4 2023/24 including:

- Procurement communications
- Project Enterprise (ERP replacement)
- Digital Services relaunch
- Service Desk Portal
- Objective upgrade
- Solid Waste
- Rates rebates
- Grants and funding
- Murupara Community Board by-election
- Suspicious package incident
- Online property files
- Road safety
- Long Term Plan consultation and engagement, communications activities + documents
- Climate Change
- Future Proof
- 2 The Strand
- Dog registration campaign
- Animal control – roosters
- Matatā Wastewater
- ePlan – Whakatāne District Plan goes digital
- Coastal inundation
- Coastal hazard mapping
- Plan Change 8
- Wharfside
- Cycleways
- Road Naming and Addressing Policy
- Spatial Plan
- Annual Report
- Tiny Homes
- Three Waters consent replacement media
- Plan Change 6 withdraw (audible bird scarers)
- Ferry Road wastewater pumpstation
- Hinemoa stormwater improvements
- Three Waters BAU – pipe replacements programme
- 144 The Strand purchase media
- Climate change
- Road naming policy
- District-wide Road maintenance BAU campaign
- Rose Gardens + Farnworth Crescent Playground upgrades
- Stanley Road storm damage repair
- Pink Shirt Day
- Edgecumbe Basketball Court
- Mataatua Reserve Bollards
- Whakatāne Fitness Centre 6 week challenge
- Taituarā Awards
- Reorua ki Whakatāne Fund opening
- River access improvements at Wairaka Centennial Park
- Road safety interventions – Blueberry Curves
- Tree Policy
- Tree Strategy
- Arts Strategy
- Procurement templates
- Code of conduct
- Holiday Park whakatauki options
- Matariki internal activities
- Internal Reo lesson videos
- Mimiha Stream Bridge upgrade
- Ko Kōnei newsletter x3
- Murupara Community Board Newsletter
- Rangitāiki Community Board Newsletter
- School holiday programme – July - Te Koputu
- Matariki promotions (Te Koputu & internal WDC promotions)
- Public holiday information signage
- CE recruitment brochure and 100 day plan documents
- Aquatics Centre signage refresh
- Locky docs digital screens
- Holiday park rebranding and collateral
- District Plan - ePlan live campaign
- He Waka Hono Hapori Community Connections
- Anzac programme and socials
- Resource Recovery Centre signage
- Tourism – ‘Discover our winter’ campaign
- Tourism – Brochure updates (multiple)
- Event – light up promotion
- District entrance signage (Ōhope + Cheddar valley + Nukuhou)
- Matatā community plan support
- Exhibitions:
 - Ao te Pō – Pō te Ao exhibition
 - Not to represent, but memorialise exhibition
 - Moemoea
 - Tokainiua Devatine
 - Landmarks for the Landless
- Pest control reserve closure
- Satellite towns footpath maintenance programme
- Peace Street Stormwater and Road Safety Upgrade
- June weather event(s)
- Te Pūaha Fund campaign
- Muriwai Drive Speed Bumps
- Footbridge maintenance
- Toitū Te Tiriti Hikoi
- Loud in the Library
- Māori Wards Bill
- NZ Civil Defence Emergency Mobile Test
- Whakaari Unrest
- Sand Fuse lowering
- April weather event(s)
- Braemar Road storm damage repair
- Whakatāne River Bar dredging
- Whakatāne Aquatic & Fitness Centre Maintenance

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Finance Performance Measures

Ngā inenga mahi ahumoni

The measures below provide an overview of Council's financial management practices, trends, and forecasting ability. Variances that are outside the target range are shown as red.

Operating expenditure

| | ACTUAL | BUDGET | VARIANCE % | Target |
|-------------|----------|----------|------------|---------------------------|
| 2023/24 YTD | \$77.09M | \$78.60M | 1.9% | At or within 5% of budget |

Capital expenditure

| | ACTUAL | BUDGET | VARIANCE % | Target |
|-------------|----------|----------|------------|---------------------------|
| 2023/24 YTD | \$45.94M | \$89.26M | 48.5% | At or within 5% of budget |

Fees and charges revenue

| | ACTUAL | BUDGET | VARIANCE % | Target |
|-------------|----------|----------|------------|---------------------------|
| 2023/24 YTD | \$11.22M | \$11.59M | 3.2% | At or within 5% of budget |

Other revenue

| | ACTUAL | BUDGET | VARIANCE % | Target |
|-------------|----------|-----------|------------|---------------------------|
| 2023/24 YTD | \$91.48M | \$100.30M | 8.8% | At or within 5% of budget |

Debt as a proportion of Annual Plan forecast

| | ACTUAL | FORECAST | VARIANCE % | Target |
|--|----------|----------|------------|----------------------------|
| | \$135.9M | \$133.2M | 2.0% | Within 5% of forecast debt |

Rates debtors

| | PERCENTAGE COLLECTED | VARIANCE % | Target |
|--|----------------------|------------|--------------------------|
| | 96.8% | 3.2% | Within 5% of total rates |

Operating Expenditure YTD: Overall expenditure largely aligns with budget for the 2024 financial year.

Capital Expenditure YTD: Project delivery is behind budget as signalled during the year. A number of capital projects are now anticipated to continue into the 2025 financial year; a number of projects have been rebudgeted in the LTP with some funds also anticipated to be requested as carry forwards.

Fees and Charges YTD: Fees and charges are less than budget at the close of the year (3.2%), with the main underbudget variances related to Aquatics and compliance activities (Resource Consents, Building, Animal Control, Parking).

Other Revenue YTD: Predominant driver of other revenue under budget is capital subsidies, this is related to the timing of capital projects predominantly Better Off Funded and Transport projects.

Debt as a proportion of LTP forecast: Net borrowings are \$135.9m compared to \$133.2m forecast, this is within 5% of forecast debt.

Rates Debtors as a % of Total Rates: Land Rate debt is \$8.21M at end of June 2024 (this debt relates to prior years as well). % of invoiced rates collected 96.8%

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Preparedness Performance Measures

Ngā inenga mahi whakaritenga

The following measures show the capacity of the organisation to meet current and future obligations as required.

Emergency Operations Centre

The minimum requirement for a full EOC roster is 90 staff. There are over 90 staff available to roster in the WDC EOC, of which 61% (55 of 90) have completed intermediate level training. This number includes those who have completed function specific training. The 90 staff required on a roster is made up of 10 Managers + 20 staff. 30 staff per shift, 3 shifts.

Initiatives now in place that are proving valuable to maintain and increase training levels of staff include; Communities of practice, coordinated by Emergency Management Bay of Plenty (EMBOP), that provide opportunities for staff across councils in the Bay of Plenty to meet online and share best practice, function specific training that outlines in more detail the roles and responsibilities within the EOC, and EOC Monthly Stand Ups – well received by staff and a great opportunity for us to start fostering positive working relationships within our team during ‘peace time’ before we have to work together under pressure during an emergency event.

Number of staff attending Māori development training programmes

This reporting period highlights the challenges and successes for our team in terms of resourcing and our work programme. Te Kahupapa (cultural capability framework) has been reviewed and a new suite of training will be rolled out in the new year. The new programme is designed to be trained in ‘cohorts’ that will lead selected participants through foundational steps of Te Tiriti, He Taura Here Tangata (Noho Marae), Te Puawaitanga o Te Reo (Te Reo classes), Legislation and Settlements, Engagement Training and Haerenga to rōhe.

Te Puawaitanga o te reo (Internal te reo Māori sessions), 2024 classes commence on 22nd July. We continue to offer Level 1 & 2 training and have introduced Level 3 to further staff progression in te reo Māori. We currently have 45 staff members enrolled. Toi Kōtuia team continues to pivot and prioritise our work programme to ensure the organisation can meet its legislative obligations to Iwi, hapū and whānau while continuously reviewing our policies, processes and frameworks to ensure they remain fit for purpose.

Iwi Engagement- Collaboration with Iwi, hapū and whānau continues to strengthen with notable successes in Reorua Whakatāne (Ngāti Awa), Reorua Murupara (Ngāti Manawa) and Te Au o te Awa Punga (Policy Hub). Our relationship is further galvanised by the organisations disapproval of the current government’s rapid potential legislative changes, including Māori Wards and fast-track consenting.

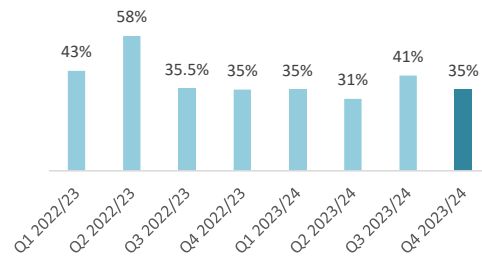
MACA- The team is currently coordinating evidence for our legal counsel as WDC is an interested party for the Ngāti Awa hearings of the Marine and Coastal area applications. This is a substantive piece of work that reaches across all business units and can have enduring ramifications if not carefully collated.

Resourcing- Our response and leadership to the critical issues outlined above, in addition to delivery of the ‘business as usual work programme’ implementation very clearly demonstrates the value of Council’s investment in our capacity and capability. Our small team has been able to meet deadlines and provide ad hoc support, however at times this has been at the detriment of projects being delayed and only 2 of the 7 Iwi with a dedicated relationship lead. We welcome additional future resources to our team, which will enable a focused support for our remaining Iwi and provide the necessary resources required to support the organisation whilst continuing specific projects and work programmes to meet the outcomes of Te Toi Waka Whakareia.

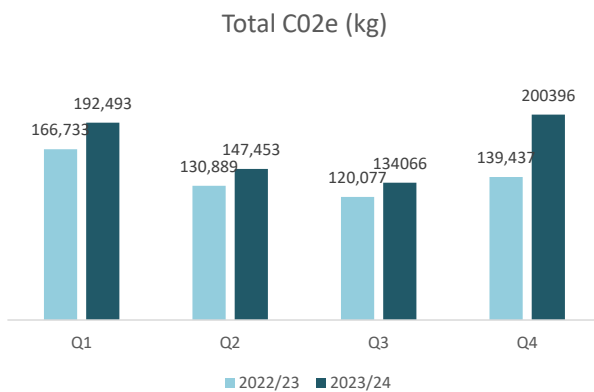
7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Percentage of staff who have completed cyber security training

In Q3, module trainings were provided from provider KnowBe4 including topics such as Phishing, Hacking and Technology Security. 35% of staff completed these. The Security & Infrastructure Team have started giving out coffee vouchers at random to those who have completed their KnowBe4 training in an endeavour to increase participation levels. Staff continue to consider other incentives to increase completion rates. Target: 50%



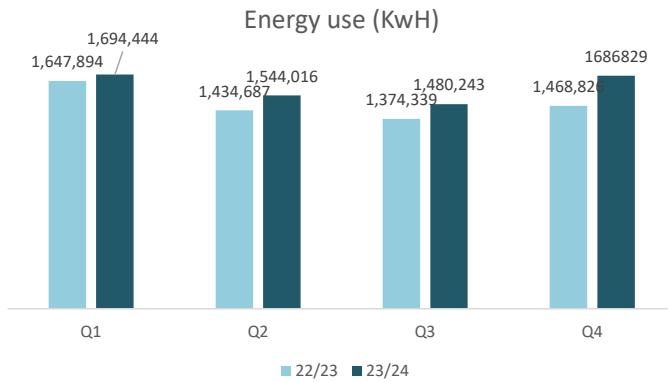
Emission reductions through the energy management programme²



Energy emissions have increased since the last quarter and when compared to the same period last year. The main contributing factor in emissions is the increase in energy use at the Aquatic Centre over the past quarter. The Aquatic Centre had two outdoor pool heat pumps out of operation for a period of time, causing a reliance on gas boilers to heat the outdoor pool. Secondly, the Aquatic Centre had its first shutdown in three years, from 29th April to 19th May, 2024. During the shutdown the pools were drained and then refilled. Upon refilling the water temperature needs to be brought up quickly, which uses a lot of gas. There is a direct correlation between increased gas usage and increased CO2 emissions.

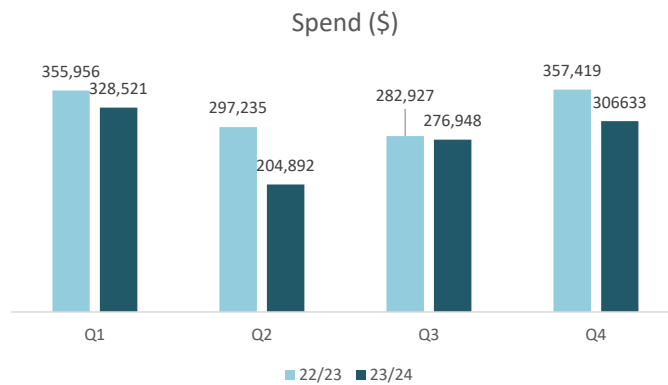
² The emissions figures have been updated since the last organisation performance report. Figures have been updated due to revised emissions factors that have been released from the Ministry for Environment.

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)



Energy use increased since the previous quarter. This was anticipated as we moved into the colder months of the year and reliance on gas increased. Notably, energy use has increased by 14.8% when compared to the same period last year. The Aquatic Centre was the main facility contributing to this comparative increase. Electricity use was below the baseline and gas use above baseline in June with the outdoor pool heat pump only becoming operational in the last few days of June. Prior to this the gas boilers were being used to heat the outdoor pool water. This has resulted in less electricity and more gas. The heat pump is more energy efficient and provides lower cost heating for the outdoor pool compared to the gas boilers.

Notable decreases in energy usage were seen at the Te Koputu Library and Museum. Both facilities have been consistently tracking below their electricity baseline over the past 6 months.



Despite energy usage being higher in comparison with the same period for the previous year, energy spend has continued to decline. This was expected as a reflection of where the electricity futures market was at the time of signing a contract with the retailer (Mercury).

Progress Report against the Council Business Plan 2023-24

Whakatāne District Council Business Plan 2023-24 – Q4 Report (status of work programme as at 30 June 2024)

1. Introduction:

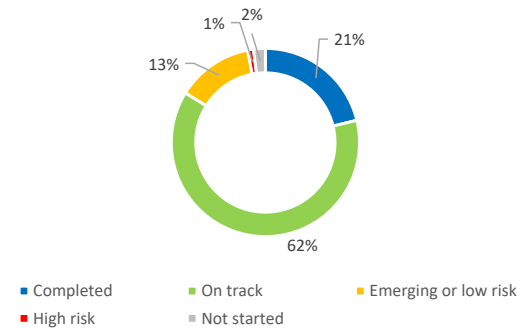
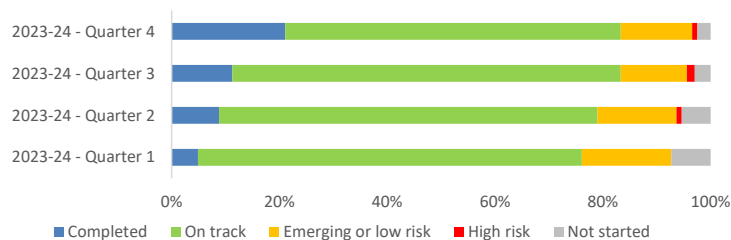
The following information provides an overview of progress against the work programme as set out in the Council’s Business Plan for the 2023-24 financial year. The Business Plan illustrates Council’s work programme for a ‘one-year’ period and supports implementation of Council’s Long-Term Plan 2021-31 which sets out Council’s direction, priorities, projects, activities and indicative budget for a ‘ten-year’ period. This report represents the status of the work programme at the end of quarter four of the financial year (as at 30 June 2024). A new business plan is currently under development to support the recently adopted Long-Term Plan 2024-34.

Summary:

- There are a total of 204 items listed in the Business Plan for Q4 of the 2023-24 year.
- Of these items 83% are either completed or on track at the end of quarter 4.
- 24 delivery risks are brought forward for Council information in this report.
- A detailed delivery risk report has been provided to the executive team for management.

2. How we are tracking against the full business plan:

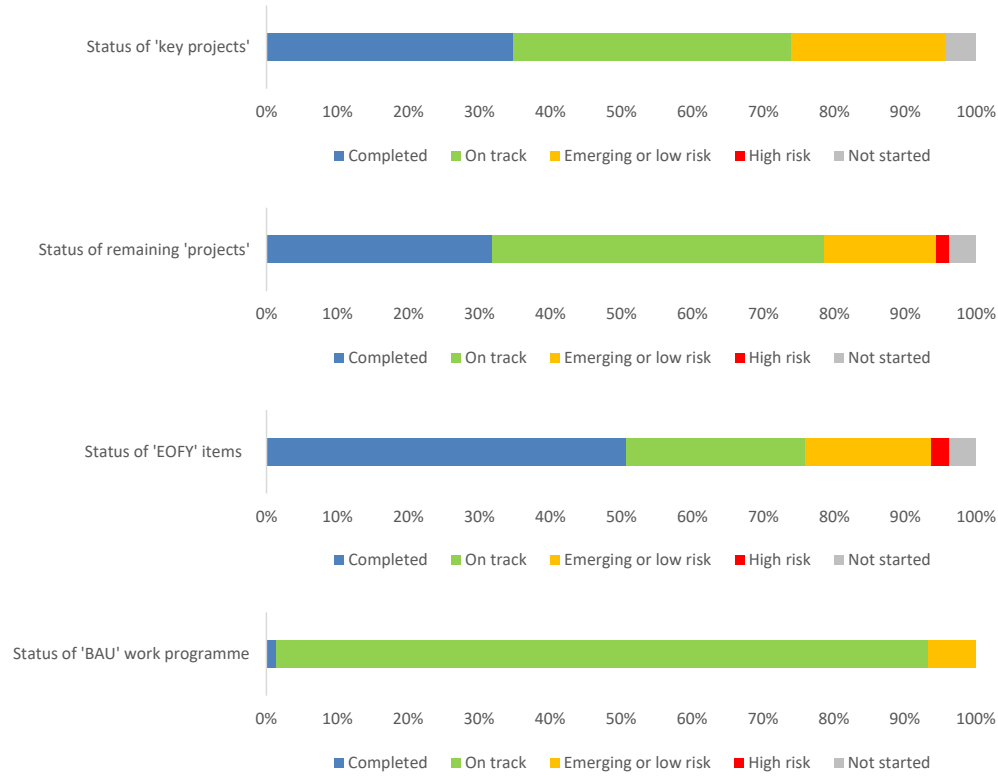
As at quarter four, the Council Business Plan reports against 205 programmes, projects, services and initiatives. At the end of the last quarter of the 2023/24 financial year the work programme is tracking overall as follows.



7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

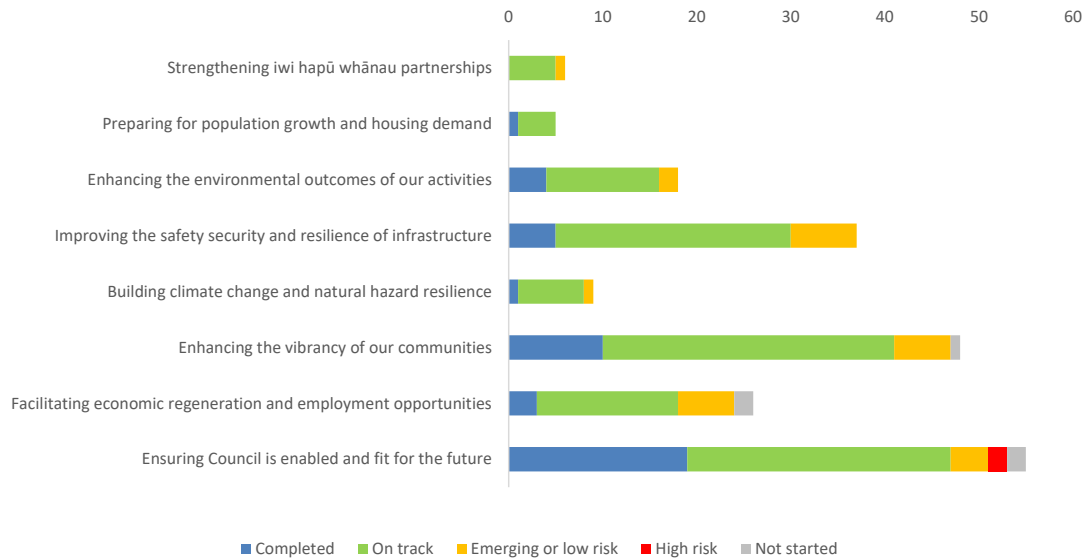
How we are Tracking against BAU versus projects

These charts show progress against various subsets of our work programme including the status of our ongoing service delivery work compared to projects. Our current Business Plan reports against 205 items including 111 BAU items, 24 key projects, and 70 remaining projects.



How our work programme is tracking against the strategic goals in our Long-Term Plan (LTP)

Our 2021/31 LTP sets out eight strategic goals that the organisation is working towards on behalf of the community with Council is progressing numerous projects, initiatives and work programmes to work towards these priorities. The information on this chart illustrates progress against the full work programme arranged by each of Council’s strategic goals.



7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

Work programme items completed:

Items completed previous quarters 1-3:

- ✓ Review Community Grants Programme and Policy
- ✓ LTP sub-project: Review Strategic Framework
- ✓ LTP sub-project: Complete LTP Consultation
- ✓ Complete fees and charges review
- ✓ Participate in Future for Local Government Review
- ✓ Complete CCTV upgrade and expansion programme (BOF project)
- ✓ Identify Council property requirements and develop property acquisition presentation
- ✓ Complete a project plan for 'Project Culture'/EPMO
- ✓ Establish a Project Culture working group with staff from across Council
- ✓ Complete College Rd Edgcumbe shared use path (Active Whakatane project)
- ✓ Implement national standardised kerbside recycling to commence Feb 2024
- ✓ Review Solid Waste Team structure to accommodate legislative/operational/services changes
- ✓ Complete replacement of 33m pool filtration system
- ✓ Complete aquatic Centre air conditioning unit remediation project
- ✓ Develop Whakatane District Arts, Culture and Creativity Strategy
- ✓ Manage Civic Centre rehoming and workplace strategy
- ✓ Develop and implement internal audit delivery work plan
- ✓ Manage IT transition into the new civic centre following upgrade
- ✓ Develop and implement Information Services operational model plan aligned to IS strategy
- ✓ Complete/close Civic Centre strengthening and upgrade works

Items completed in Q4:

- ✓ LTP sub-project: Financial Strategy and Revenue Financing Policy
- ✓ LTP sub-project: Infrastructure Strategy
- ✓ LTP sub-project: Activity Management Plans and budgets
- ✓ LTP sub-project: Review policies to fund infrastructure for growth (DCP and FCS)
- ✓ Facilitate and support Awatapu Community Plan - finalise action plan and commence implementation
- ✓ Review Council Climate Change Strategy
- ✓ Planning for Wharf Side Ohope capital improvements
- ✓ Transport AMP and Infrastructure Strategy review (incl. engagement with Waka Kotahi on priorities)
- ✓ RTZ project - Thornton Road Safety Improvements (Walker Rd to Smith Rd)
- ✓ Landing road roundabout renewal and upgrade
- ✓ Undertake contract review and renewals for solid waste services - three major contracts due for renewal
- ✓ Investigate food waste collection and processing options
- ✓ Develop War Memorial Hall and Rex Morpeth Park Master Plan
- ✓ Mataatua reserve security improvements
- ✓ Collections condition assessment, cataloguing, and location project planning (storeroom 3).
- ✓ Develop and implement an effective framework for capital expenditure programme planning, forecasting and delivery
- ✓ Develop and implement finance operational model plan aligned to Healthcheck2020 findings, incorporating customer focused business partnering principles
- ✓ Develop legal regulatory compliance framework
- ✓ E-Plan (Digitisation of District Plan)
- ✓ Runway lighting navigation upgrade
- ✓ Deliver airport upgrade projects for 2024 (Airport hardstand, operational fence, CCTV replacement, operational system)

3. Analysis of risk in the Business Plan as at quarter 4 of the 2023-24 financial year:

Of the 204 items in the Business Plan, 24 items are brought to attention due to their risk status as at quarter 4. This includes any items that trigger the one or more of the following risk criteria.

- a. **'High risk'** Any projects or items that identify a high level of risk [2 items]
- b. **'Key projects at risk'** Any key projects that identify any level risk or are not started [6 items]
- c. **'EOFY risk'** Items that were due for completion by EOFY that identify any level risk or are not started [19 items]

*Note: Three items are triggered by multiple risk categories and feature more than once in the following table.

| Ref# | GM sponsor(s) | Item type | Project/item | Intended completion (FY) | Quarter | | | | Staff commentary |
|---|------------------------------|-------------|--|--------------------------|----------------------|----------------------|----------------------|----------------------|---|
| | | | | | Q1 | Q2 | Q3 | Q4 | |
| a. Items that identified a high level of risk | | | | | | | | | |
| 2.1.10* | CFO-GM:Business Partnering | Project | LTP sub-project: Rates Review | 2024 | On track | On track | High risk | High risk | The rates review for UAGC has been completed as part of the LTP. With water services now remaining with Council a review of targeted water rates is also necessary and will commence next financial year. |
| 8.3.05* | CFO-GM:Business Partnering | Project | Review financial delegations | 2024 | Not started | Not started | High risk | High risk | Long Term Plan priorities have impacted this deliverable. The project is rescheduled to commence in the next financial year. |
| b. Key projects that identified any level risk or are not yet started | | | | | | | | | |
| 2.4.04 | GM:Strategy & Transformation | Key project | Manage Boat Harbour project workstreams and shareholder reporting to Council | ongoing | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | Project delayed by soil contamination assessment. Further progress dependent on remediation planning, resource consent, and update of business case. |
| 2.4.05 | GM:Strategy & Transformation | Key project | Reset town centre riverfront project (Te Ara Hou) | 2025 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | Council continues to await Government guidance on reallocation of Kanoa funding to other projects. |
| 2.4.06 | GM:Strategy & Transformation | Key project | Review Town Centre vision document | 2025 | Not started | Not started | Not started | Not started | This project has strong linkage to the above item (2.4.05, Te Ara Hou) and needs to be advised by the Chief Executives Group to progress further. |

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

| Ref# | GM sponsor(s) | Item type | Project/item | Intended completion (FY) | Risk Status | | | | Staff commentary |
|--|------------------------------|-------------|---|--------------------------|----------------------|----------------------|----------------------|----------------------|---|
| | | | | | Q1 | Q2 | Q3 | Q4 | |
| 4.1.06* | GM:Infrastructure | Key project | Navigating three waters reform and transition to new delivery model | 2024 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | This project has been impacted by a change in central government policy. Council currently has no clear internal resourcing plan to respond to impending legislation expected under central government 'local water done well' reframing of the reform. |
| 7.4.07 | GM:Community Experience | Key project | Acquire land and subject to acquisition, develop plan for new cemetery | 2025 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | There continues to be challenges with finding appropriate land to advance this project. |
| 8.1.09 | GM:People & Engagement | Key project | Fit for future organisation review (planning for post reform organisational design) | 2027 | On track | On track | Emerging or low risk | Emerging or low risk | This project was driven by three waters reform and not intended to be progressed further until there is more clarity and certainty for Council on the direction of three waters. |
| c. Items due for completion by 2024 EOFY that reported any level risk or are not yet started | | | | | | | | | |
| 1.3.05 | GM:People & Engagement | Project | Finalise communications strategy and commence implementation | 2024 | On track | High risk | High risk | Emerging or low risk | The strategy will be presented to Council in September. Some resource for implementation of the Strategy has been allocated through the Long Term Plan, however some actions will need to await allocation of resource. |
| 1.4.09 | GM:People & Engagement | Project | Support development of community plan for Awatarariki fan-head reserve | 2024 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | Next steps on this project are dependent on action led by external community partners. The project will continue over the next financial year. |
| 2.1.10* | CFO-GM:Business Partnering | Project | LTP sub-project: Rates Review | 2024 | On track | On track | High risk | High risk | The rates review for UAGC has been completed as part of the LTP. With water services now remaining with Council a review of targeted water rates is also necessary and will commence next financial year. |
| 2.3.05 | GM:Strategy & Transformation | Project | Finalise Destination Management Plan in collaboration with Iwi | 2024 | On track | On track | Emerging or low risk | Emerging or low risk | Further engagement with Iwi is required to progress this project further. |

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

| Ref# | GM sponsor(s) | Item type | Project/item | Intended completion (FY) | Intended completion (FY) | | | | Staff commentary |
|---------|------------------------------|-------------|---|--------------------------|--------------------------|----------------------|----------------------|----------------------|--|
| | | | | | Q1 | Q2 | Q3 | Q4 | |
| 2.3.07 | GM:Strategy & Transformation | Project | Construct stages of Rangitaiki Cycle Trail - Edgcombe to Thornton section and Mill Rd section (incl BOF contribution) | 2024 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | Stage One to Edgcombe Reserve is due to start construction with consultation for stages 2 and 3 underway. Mill Road section on hold to allow for continued consultation with hapu. The projects and timing are also reliant on partnership with BOPRC due to stop-bank work. |
| 2.3.08 | GM:Strategy & Transformation | Project | Mitchell Park capital improvements programme | 2024 | On track | On track | Not started | Not started | Council made a decision to pause commencement of this project and requested staff to reconsider a staged approach. |
| 2.4.07 | GM:Strategy & Transformation | Project | Integrate BoPRC Town Centre Flood Management with urban design master planning | 2024 | On track | On track | On track | Emerging or low risk | Project is progressing but the scope will be subject to confirmation of funding partnerships. |
| 2.4.09 | GM:Strategy & Transformation | Project | Research project to understand the local Maori economy | 2024 | Not started | Not started | Not started | Not started | This project is reliant on completion of the Eastern Bay of Plenty Economic Development Strategy currently underway. |
| 3.1.06 | GM:Infrastructure | Project | Development of 'Road to Zero' speed management plan (implementation over following ten years) | 2024 | On track | On track | On track | Emerging or low risk | Changes in central government direction are impacting this work. A planning workshop with Councillors is due to Council early in the new financial year. |
| 3.1.07 | GM:Infrastructure | BAU | Contribute to SH30 speed and safety review (NZTA led) | 2024 | On track | On track | On track | Emerging or low risk | This project is led by Waka Kotahi and being influenced by changes in central government direction. Council are continuing to liaise with Waka Kotahi on this project. |
| 4.1.06* | GM:Infrastructure | Key project | Navigating three waters reform and transition to new delivery model | 2024 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | This project has been impacted by a change in central government policy. Council currently has no clear internal resourcing plan to respond to impending legislation expected under central government 'local water done well' reframing of the reform. |

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

| Ref# | GM sponsor(s) | Item type | Project/item | Intended completion (FY) | Performance | | | | Staff commentary |
|---------|----------------------------|-----------|---|--------------------------|----------------------|----------------------|----------------------|----------------------|---|
| | | | | | Q1 | Q2 | Q3 | Q4 | |
| 4.1.15 | GM:Infrastructure | Project | Develop a Whakatāne water scheme pressure reduction plan | 2024 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | Priorities and progress within three waters activities have been impacted by changing central government policies. Work is in progress but with time delays. |
| 4.1.18 | GM:Infrastructure | Project | Assess options for alternative communications system for SCADA network | 2024 | On track | Emerging or low risk | Emerging or low risk | Emerging or low risk | Priorities within three waters activities have been impacted by changing central government policies. This is a complex project in particular with uncertainty around the reform. Past SCADA strategy to be reviewed. |
| 5.1.15 | GM:Infrastructure | Project | Review of Asset Management Plan for Waste Management and Minimisation activity | 2024 | Not started | On track | On track | Emerging or low risk | Asset Management Plan is awaiting final approval of LTP budgets to be finalised. |
| 7.4.08 | GM:Community Experience | Project | Planning and partnership for Ngā Tapuwāe o Toi trail | 2024 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | The project is externally led by Department of Conservation with timing is outside of Council control. |
| 7.4.09 | GM:Community Experience | Project | Ngā Tapuwāe o Toi trail west end track reinstatement (subject to external funding) | 2024 | Emerging or low risk | Emerging or low risk | On track | Emerging or low risk | Final designs to bypass the slip sites are on hold. Further investigations are currently underway with consultants, engineers and track building specialists to determine the possibility of an alternative route for the track due to the ongoing risks of slips along the length of the existing track. |
| 8.3.04 | CFO-GM:Business Partnering | Project | Review procurement to centralise and align to best practice incorporating better outcomes framework including revised principles, policies and procedures | 2024 | Emerging or low risk | Emerging or low risk | Emerging or low risk | Emerging or low risk | Procurement work-plan has been presented to and endorsed by ELT. Implementation of the workplan has now commenced. |
| 8.3.05* | CFO-GM:Business Partnering | Project | Review financial delegations | 2024 | Not started | Not started | High risk | High risk | Long Term Plan priorities have impacted this deliverable. The project is expected to commence next financial year. |

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24 (Cont.)

| Ref# | GM sponsor(s) | Item type | Project/item | Intended completion (FY) | | | | Staff commentary | |
|--------|----------------------------|-----------|---|--------------------------|-------------|-------------|-------------|------------------|--|
| | | | | Q1 | Q2 | Q3 | Q4 | | |
| 8.4.06 | CFO-GM:Business Partnering | Project | Implementation of applications and systems aligned to roadmap identified in IS Strategy, as reviewed and agreed with ISGG, to support organisational outcomes | 2024 | Not started | Not started | Not started | Not started | This project has been impacted by competing priorities and is expected to carry forward to 2025. |

4. Common reasons for risk:

Risk commentary has been analysed to understand any key themes and recurring themes of risk. The findings per quarter and totalled for the full year are as follows:

| Risk theme | Q1 | Q2 | Q3 | Q4 | Total 2023-24 |
|---|----|----|----|----|---------------|
| Change in central government direction/awaiting CG direction or decision | 2 | 1 | 9 | 9 | 21 |
| Awaiting external dependencies/working through external technical matters | 8 | 2 | 4 | 7 | 21 |
| Budget or funding constraints | 0 | 5 | 7 | 5 | 17 |
| Capacity challenges | 11 | 10 | 6 | 4 | 31 |
| Reliant on external partner engagement, input, direction | 5 | 8 | 7 | 5 | 25 |
| Reliant on internal dependencies | 2 | 2 | 2 | 3 | 9 |

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)

How our measures are calculated

Overall resident satisfaction with Council services – Results are provided from the quarterly Residents Satisfaction Survey provided by SIL research. The overall score includes all survey questions relating to the satisfaction with Council services. The New Zealand Benchmark is calculated at the end of the financial year and compares how we have performed, against other Councils. Our target will change every year based on this result and will report against the previous year's benchmark.

Requests for Service – is the service delivery process that supports any request (job) received by the public that is formally recorded. The request is then referred to the appropriate department for further action and closed once completed. A Request for Service enables our community to notify Council of any problems/concerns in our District that need to be brought to our attention for necessary action such as animal control, water, or rates etc. There are multiple ways a Request for Service can be logged such as telephone, email, website or in person.

Emergency Operations Centre (EOC) Training Requirements – 90 staff are required to be on the EOC roster, with 60% of these staff to have completed training appropriate for the role. This measure ensures that we are prepared to effectively manage and respond to an emergency.

Culture and Leadership Survey – This is sent to 100 randomly selected staff members to participate in quarterly. The survey has a total of 25 questions (11 relating to workplace culture, 7 relating to leadership, and 7 relating to performance development) to help us understand staff perception of our culture and leadership.

LGOIMA – This is a request for information under the Local Government Official Information and Meetings Act 1987. These requests must be completed within 20 days of being received.

Emission reductions – Council undertook an energy audit in 2018 in collaboration with the Energy Efficiency and Conservation Authority (EECA) and with the support of Council's energy management contractor, EMSOL. Since September 2019, an energy management programme has been underway to identify, implement, and monitor opportunities for energy savings and emission reductions. Council continues to monitor specific sites and facilities of interest, which contribute towards the majority of Council's energy use. The emission reduction metric, reports on the carbon dioxide equivalent (Co2e) emitted from the 14 sites included in the energy management program. CO2e is calculated from electricity and natural gas usage. Reduction in energy usage and switching of source contributes to a reduction in our total carbon dioxide emissions.

7.3.1 Appendix 1 - Organisation Performance Measures Q4 2023-24(Cont.)



WHAKATĀNE DISTRICT COUNCIL ORGANISATION PERFORMANCE REPORT Q2

1 OCTOBER – 30 DECEMBER 2023

Te Pūrongo Aroturukitanga Mahi a

Te Kaunihera ā-rohe o Whakatāne 1

7.4 Draft Annual Report 2023/24

7.4 Draft Annual Report 2023/24



To: **Finance and Performance Committee**

Date: **Thursday, 29 August 2024**

Author: **S Ellis / Senior Strategic Policy Analyst, and**
Authoriser: **L Woolsey / Manager Strategy and Performance**

Reference: **A2729154**

1. Reason for the report - *Te Take mō tēnei rīpoata*

The purpose of this report is to provide the Finance and Performance Committee with an initial draft of the Whakatāne District Council Annual Report 2023/24 and to seek delegated authority from the Chair and Deputy Chair of the Finance and Performance Committee and the Chair of the Risk and Assurance Committee approval to approve the final draft report that will go to Council's auditors (Audit New Zealand).

The draft report attached outlines our achievement highlights and non-financial performance measure results for the financial year.

2. Recommendations - *Tohutohu akiaki*

1. THAT the Finance and Performance Committee **provide feedback** on the content and non-financial performance measures in the proposed draft Whakatāne District Council Annual Report 2023/24; and
2. THAT the Chair and the Deputy Chair of the Finance and Performance Committee be **delegated authority** to approve Council's draft of the Whakatāne District Council Annual Report 2023/24 to be provided to the Council's auditors.

3. Background - *He tirohanga whakamuri*

The development of the Annual Report is a mandatory process under the Local Government Act 2002 (the LGA). It is our opportunity to report back to the community about our Council's financial and non-financial performance for the year ended 30 June 2024.

The reporting standard for the Annual Report is the accounting standard, PBE FRS 48 which requires Council to present their service performance information in the context of why the organisation exists, what it intends to achieve in broad terms, and what was done during the reporting period to achieve its broader aims and objectives.

The Annual Report is usually completed and adopted, by resolution, within 4 months after the end of the financial year to which it relates (31 October 2024). However, there has been a legislative change under LGA 2002, Schedule 1AA, Part 8, Section 47 which states an extended time frame for adopting an annual report if an authority decides to adopt its 2024–2034 long-term plan on or after 1 July 2024 but no later than 30 September 2024. The authority may complete and adopt, by resolution, its annual report for the 2023/2024 financial year no later than 31 December 2024.

7.4 Draft Annual Report 2023/24(Cont.)**4. Issue/subject - *Kaupapa*****4.1. Draft Whakatāne District Council Annual Report for comment**

Attached to this paper as Appendix 1 is a draft of the Council's Annual Report 2023/24 which includes key highlights from the financial year and non-financial performance information. Please note the draft financial information associated with the Group of Activities section of the Annual Report is attached as Appendix 2. In the final version this information will be incorporated in the front section of the report. Appendix 3 will be tabled at the meeting and will include the whole of council financial statements.

It should be noted that the format for this year's annual report differs from the previous year with changes made following feedback from New Zealand Audit. We are required to make improvements to our report format to meet PBE FRS-48 Service Performance Reporting Requirements.

There will be opportunity for further proof reading and editing before the Annual Report is finalised. At this draft stage, the Committee is encouraged to provide high level feedback on the content of the Annual Report so that it can be incorporated into the document.

4.2. Audit Process

The Finance and Performance Committee's role is to approve the draft Whakatāne District Council Annual Report to go to Audit.

A meeting was held with Audit on Thursday, 15 August 2024 to discuss the Annual Report Audit Plan. Due to delays with the LTP adoption, the audit for the Annual Report has been delayed, and will commence on 16 October 2024. At the Risk and Assurance Committee Meeting held on Monday, 19 August 2024, it was recommended that Council uses the next month to prepare the Annual Report for audit.

The next Finance and Performance Committee meeting scheduled is Thursday, 21 November 2024. As this meeting is after audit will have commenced, delegated authority is sought for the Chair and Deputy Chair of Finance and Performance to approve the final draft to go to audit prior to the next meeting. The Chair of Risk and Assurance will also be advised and kept up to date on developments. This final draft will incorporate feedback from today as well as finalised finance information. Once audited, the final Annual Report will go to the full Council for adoption.

The Risk and Assurance Committee, charged with oversight of the external audit, will receive the auditor's report from the appointed auditor, discuss any issues relating to the audit, and provide relevant direction to staff, prior to the Council receiving the final document.

It is proposed that the Whakatāne District Council Annual Report 2023/24 be adopted by Council before the deadline of 31 December 2024.

A month after the adoption of the Annual Report, the report and a summary will be made available on our website.

5. Options analysis - *Ngā Kōwhiringa*

The development of an Annual Report is a legislative requirement of the Local Government Act 2002.

7.4 Draft Annual Report 2023/24(Cont.)

6. Significance and Engagement Assessment - *Aromatawai Pāhekoheko*

6.1. Assessment of Significance

The decisions and matters of this report are assessed to be of low significance, in accordance with the Council's Significance and Engagement Policy.

The activities the report refers to are deemed to have varying levels of significance, the report itself has been assessed as having a low significance.

7. Considerations - *Whai Whakaaro*

7.1. Financial/budget considerations

There are no budget considerations associated with the recommendations of this report. The development of the Annual Report is being funded from the existing budget.

7.2. Strategic alignment

This Annual Report is reporting against the third year of the Long-Term Plan 2021-31.

7.3. Climate change assessment

The Annual Report includes a climate change section with achievements for the 2023/24 financial year. This includes the ongoing monitoring of Council's energy use and carbon footprint

The decisions and matters of this report are assessed to have low climate change implications and considerations, in accordance with the Council's Climate Change Principles.

7.4. Risks

The Annual Report is legislatively required to be adopted by Council by 31 December 2024. Adoption is dependent upon Audit NZ finalising its audit opinion and issuing clearance. Should the audit process face any significant delays, the final adoption date may be impacted. The risk of delays is being actively mitigated through a project management approach, which involves risk assessment and regular progress monitoring.

Audit risks and issues have been identified for this year's Annual Report process through the Audit Plan, which was provided to the Risk and Assurance Committee on 19 August 2024.

8. Next steps - *Ahu whakamua*

Council's feedback from today will be incorporated in the draft Annual Report. A timeline of the process is shown below.

| Milestone | Timeframe |
|--|-------------------------|
| Finance and Performance Committee – delegation of authority sought | Thursday 29 August 2024 |

7.4.1 Appendix 1 - Draft Annual Report 2023/24

| Milestone | Timeframe |
|--|----------------------------|
| Final Draft of Annual Report for audit to be approved by the Chair and Deputy Chair of the Finance & Performance Committee | Monday 30 September 2024 |
| Audit commences | 16 October 2024 |
| Audit Sign off | 5 December 2024 |
| Council to adopt Annual Report and Audit Opinion issued | 12 December 2024 |
| Annual Report and Summary to be made public | Within 1 month of adoption |

Attached to this report:

- Appendix 1 – Draft Whakatāne District Council Annual Report 2023/24
- Appendix 2 – Group of Activities Financial Statements
- Appendix 3 – Whole of Council Financial Statement

(Appendix 3 will be tabled at the meeting dated Thursday, 29 August 2024)

7.4.1 Appendix 1 - Draft Annual Report 2023/24

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

ANNUAL REPORT

PŪRONGO Ā-TAU 2023/24

For the period 1 July 2023 to 30 June 2024

DRAFT

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

CONTENTS

Rārangi upoko

| | |
|--|----|
| ANNUAL REPORT | 1 |
| PŪRONGO Ā-TAU 2023/24 | 1 |
| CONTENTS | 2 |
| MESSAGE FROM MAYOR DR VICTOR LUCA – TBC | 4 |
| YOUR COUNCIL | 5 |
| WHO WE ARE AND WHAT WE DO | 6 |
| OUR VISION AND COMMUNITY OUTCOMES | 8 |
| OUR STRATEGIC PRIORITIES | 9 |
| DELIVERING ON OUR VISION, OUTCOMES and PRIORITIES | 10 |
| How to read this section of the report | 10 |
| Service Performance | 10 |
| What these activities cost and how they were paid for (Funding impact statement) | 11 |
| Explanation of categories in the funding impact statements | 12 |
| OVERVIEW OF OUR NON-FINANCIAL PERFORMANCE | 15 |
| LEADERSHIP AND COMMUNITY | 17 |
| STRATEGY AND FUTURES | 22 |
| TRANSPORT CONNECTIONS | 30 |
| PLANNING FOR THREE WATERS: | 35 |
| Three Waters Consent Replacement Strategy | 35 |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

| | |
|---|----|
| WATER SUPPLY..... | 37 |
| SEWAGE AND TREATMENT DISPOSAL..... | 43 |
| STORMWATER DRAINAGE..... | 47 |
| WASTE MANAGEMENT AND MINIMISATION..... | 50 |
| COMMUNITY EXPERIENCE..... | 55 |
| COMMUNITY SAFETY..... | 61 |
| CORPORATE SERVICES..... | 69 |
| Local Government Funding Agency (LGFA)..... | 71 |
| Bay of Plenty Local Authority Shared Services..... | 71 |
| EXPANDING OUR REACH: FUNDING, CLIMATE ACTION, AND ACHIEVEMENTS..... | 73 |
| Better off Funding Projects..... | 73 |
| Our commitment to addressing climate change..... | 76 |
| Reducing our energy use..... | 77 |
| Celebrating our awards..... | 78 |
| NOTES TO THE FINANCIAL STATEMENTS..... | 80 |
| STATEMENT OF COMPLIANCE..... | 81 |
| AUDIT REPORT..... | 82 |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

MESSAGE FROM MAYOR DR VICTOR LUCA

Kupu whakataki o te [Koromatua](#)

*Placeholder

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

YOUR COUNCIL

Ngā Kaikaunihera

Dr Victor Luca

Mayor

Lesley Immink

Deputy Mayor

Julie Jukes

Councillor, Whakatāne-Ōhope General Ward

Nándor Tánzos

Councillor, Whakatāne-Ōhope General Ward

Andrew Iles

Councillor, Te Urewera General Ward

Gavin Dennis

Councillor, Rangitāiki General Ward

Wilson James

Councillor, Rangitāiki General Ward

John Pullar

Councillor, Whakatāne-Ōhope General Ward

Tu O'Brien

Councillor, Rangitāiki Māori Ward

Toni Boynton

Councillor, Kapu te rangi Māori Ward

Ngapera Rangiaho

Councillor, Toi ki Uta Māori Ward

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

WHO WE ARE AND WHAT WE DO

Ko wai mātau, ā, he aha ā mātau mahi

The Council plays a crucial role in the Whakatāne District by providing essential services, facilities and recreational opportunities that people use every day. The Whakatāne District is governed by 11 elected community representatives who make key decisions to guide our activities and shape the future of the district. The Council delivers more than 30 different services and manages around \$1.4 billion worth of community assets

The Local Government Act 2002 sets out the purpose of local government in New Zealand. It gives us a framework and empowers us to decide which activities we undertake, how we undertake them, and makes us accountable to our communities. It states that our overall role is to ensure democratic local decision-making and action by, and on behalf of, communities. We must meet the current and future needs of communities for good-quality local infrastructure, local public services, and performance of regulatory functions in a way that is most cost-effective for households and businesses.

Our mahi/work involves the delivery of a wide range of services and facilities that families/whānau, households, businesses, and visitors rely on and use every day. At the top of our list are services that ensure the health and safety of our communities, such as providing clean drinking water, appropriate treatment and disposal of wastewater, and local transport networks that allow people to move safely around the district. Many other Council activities play an essential role in making this a great district for us to live, work and play.

Our work is organised into eleven groups – including the corporate services group, which supports the delivery of our other activities. A Council-controlled organisation (CCO) operates the Whakatāne Airport in a Joint Venture agreement with the Ministry of Transport Te Manatu Waka. The following are

Our groups of activities:

1. Leadership and Community
2. Strategy and Futures
3. Roads and Footpaths
4. Water Supply
5. Sewage Treatment and Disposal
6. Stormwater Drainage
7. Waste Management and Minimisation
8. Community Safety
9. Community Experience
10. Corporate Services
11. Whakatāne Airport



7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Our groups of activities, and everything we do at Council works towards our vision, outcomes, and strategic priorities; to ensure and monitor our success each group of activities have performance measures. Our "Delivering on our Outcomes, Vision and Priorities" section will report on the outcomes and strategic priority the activity works towards, how we performed, what the activities cost and how they were paid for in accordance with PBE FRS 48 Service Performance Reporting standard.

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

OUR VISION AND COMMUNITY OUTCOMES

Tō mātou matakiteinga

Our vision – *More life in life*- and community outcomes were established through the Long-Term Plan 2021 – 31. Our vision and outcomes set out the high-level direction and goals Council will work towards to achieve its primary purpose to support and enhance the social, cultural, economic, and environmental wellbeing of our communities. Our vision embraces Council’s role in supporting our communities to flourish, fulfil their potential and live life to its fullest. A strong, resilient, and enabled Council organisation will help ensure we can achieve the things that are most important to us all.



7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

OUR STRATEGIC PRIORITIES

Ngā ruataki matua

The strategic priorities are the eight priorities Council consulted the community on when developing the 2021–31 Long Term Plan. The eight priorities provide the Council with key areas of focus to achieve our vision of ‘More life in life’. Each priority is supported by strategies, programmes of work and key projects.



All the activities we carry out contribute to the achievement of our community outcomes. If we achieve all the expectations that we have set for our service delivery, we will be making progress on achieving all eight priorities.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

DELIVERING ON OUR VISION, OUTCOMES and PRIORITIES

How to read this section of the report

Delivering on our vision, outcomes and priorities reports on how well Council's activity groups performed during 2023-24 against the performance measures and targets set out in the 2021-31 Long-Term Plan. An overview of our performance is provided before moving into sections for each of these activity groups.

For each activity grouping it will tell you:

| | |
|-----------------------------|--|
| Service Performance | <p><i>What Community Vision and Outcome it supports</i></p> |
| | <p><i>What's happened this year and which strategic priority it has contributed to</i></p> |
| | <p><i>How well we performed against our performance measures</i></p> |
| Financial Impact Statements | <p><i>What these activities cost and how they were paid for</i></p> |

Service Performance

All the activities we carry out contribute to the achievement of our vision, outcomes and our eight priorities. Each activity has performance measures that show how well we are delivering our services to the community. The performance measures and targets are from Year Three (2023-24) of our 2021-31

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Long-Term Plan, which you can find on our website [Long Term Plan 2021-31 | Whakatāne District Council \(whakatane.govt.nz\)](https://www.whakatane.govt.nz/long-term-plan-2021-31)

The Council has 69 non-financial measures contained in the 2021-31 Long-Term Plan. Within the 69 non-financial performance measures, 33 are mandatory as outlined in the Local Government Act 2002. These measures are indicated by an (M). DIA guidance has been followed in measuring performance against all mandatory performance measures. T

Monitoring our non-financial performance allows us to see how we are tracking against the levels of service we said the community can expect from us. This means we can identify areas for specific focus if required. We review our measures and structure every three years when we develop each Long Term Plan. This is the third time we are reporting on our performance against the 2021-31 Long Term Plan measures, the last in this this Long Term Plan cycle.

We have selected a range of measures to help the public assess the level of service for major aspects that are meaningful for the community. These include measuring how timely we are, our key project milestones, community perceptions and how happy users are. A number of our measures relate to our 2023/24 Resident Survey, which is undertaken by SIL Research. The purpose of this research is to engage with Whakatāne District residents, to determine levels of satisfaction and perceptions of Council's services, communications, and management. One hundred and fifty survey responses were collected each quarter, providing a total sample of 600 surveys for the final analysis.

For our emergency management measures, a survey is conducted by the Bay of Plenty Civil Defence Emergency Management Group. The survey asks respondents 10 statements that are applicable to them. In reporting our performance, we indicate whether our result has met the year's target or has not met the year's target.

We have provided a note that contextualises as to why we have or have not met the target. An exception to this is when it is a satisfaction measure, as we cannot make assumptions on why respondents of the survey were not happy with the service or facility. For comparison, we have provided the results of the performance measures from the previous year.

What these activities cost and how they were paid for (Funding impact statement)

The Funding Impact Statement for each group of activities shows our budgeted costs, as provided for in our Long Term Plan 2021-31, and our actual costs during the 2022/23 year. It also describes how the activities were funded and includes information about our internal borrowing movements for the activities in 2022/23. An explanation of the categories used in these statements can be found on the next page. Explanation of categories in the funding impact statements Funding Impact Statements break down costs and funds at an 'operational' and 'capital' level. Operational costs include the ongoing maintenance and delivery of our services, while capital costs relate to the cost of constructing a new asset or extending

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

or renewing an existing asset. Capital expenditure is generally 'one-off' in nature, whereas operational costs are ongoing. Taking all this information into account, we can then see how much we received, how much we spent, and whether we have a surplus or deficit at the end of the year

Explanation of categories in the funding impact statements

Funding Impact Statements break down costs and funds at an 'operational' and 'capital' level. Operational costs include the ongoing maintenance and delivery of our services, while capital costs relate to the cost of constructing a new asset or extending or renewing an existing asset. Capital expenditure is generally 'one-off' in nature, whereas operational costs are ongoing. Taking all this information into account, we can then see how much we received, how much we spent, and whether we have a surplus or deficit at the end of the year.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Operational

Sources of operating funding (revenue)

| | |
|--|---|
| General rates, uniform annual general charges (UAGC), rates penalties | Revenue from general rates charged on the capital value of all properties within the District, fixed charges across the whole district (UAGC), and penalties for late payment of rates. |
| Targeted rates | Rates where the benefit or use of a service can be assigned to specific households or communities, such as water, stormwater or promotion and economic development. |
| Subsidies and grants for operating purposes | Money received from other organisations that contribute to the operational cost of the service. |
| Fees and charges | Includes admission charges for Council facilities and regulatory fees e.g. permits and dog registration. |
| Internal charges and overheads recovered | Charges received from other departments of the Council such as overheads and direct costs. |
| Interest and dividends from investments | Money earned from our savings and investments through interest and dividend payments. |
| Local authorities fuel tax, fines, infringement fees, and other receipts | Miscellaneous revenue from other sources generally not of a significant nature e.g. local authority petrol tax. |
| Total Operating Funding | Total revenue from the day to day operation of this activity. |

Applications of operating funding (expenditure)

| | |
|--|---|
| Payments to staff and suppliers | The day to day cost of running this activity e.g. salaries and wages, materials and services. |
| Finance costs | Interest payments we make on funds borrowed (loans). |
| Internal charges and overheads applied | Money paid to other departments of the Council such as overheads and direct costs. |
| Other operating funding applications | Miscellaneous expenses including bad debt expense, rates remissions and loss on disposal of assets. |
| Total Applications of Operating Funding | Total operating expenditure for this activity. |
| Surplus (Deficit) of Operating Funding | Total revenue less total expenditure. |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)**Capital****Sources of capital funding**

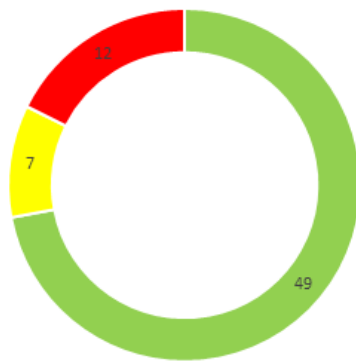
| | |
|--|--|
| Subsidies and grants for capital expenditure | Money received from other organisations that contribute to the capital cost of the service. |
| Development and financial contributions | Money paid by developers towards providing assets or extending existing assets to cater for increased demand due to growth, e.g. extending sewerage systems. |
| Increase (decrease) in debt | Borrowing money to pay for new assets, parts of assets or to fund temporary deficits, less loan repayments. |
| Gross proceeds from the sale of assets | Revenue to be raised from the sale of assets belonging to this activity. |
| Lump sum contributions | Payments made by an eligible ratepayer for the purposes of contributing to a capital project. However, we do not accept lump sum contributions for targeted rates. |
| Total Sources of Capital Funding | Total capital funding for this activity. |

Applications of capital funding

| | |
|--|--|
| Capital expenditure | Capital expenditure creating a completely new asset or extending or renewing an existing asset to provide the same or greater service than it currently provides e.g. extending a sewer pipe to increase capacity. The expenditure is split to fund level of service improvements versus population growth and/or renewal works. While a lot of our capital projects contribute to more than one of these drivers, legislation requires us to allocate each project to just one driver in the Funding Impact Statements. |
| Increase (decrease) in reserves | Transferring funds into and from a reserve account held for a special purpose. Includes: transferring development contribution revenue to development contribution reserves; using funds from depreciation reserves, and using funds from operational reserves to provide or to assist with maintaining existing assets or services. |
| Increase (decrease) of investments | Net movement of investments. |
| Total Applications of Capital Funding | Total capital expenditure for this activity. |
| Surplus (Deficit) of Capital Funding | Sources of capital funding less applications of capital funding. |
| Funding Balance | Net operating funding less net capital funding. |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

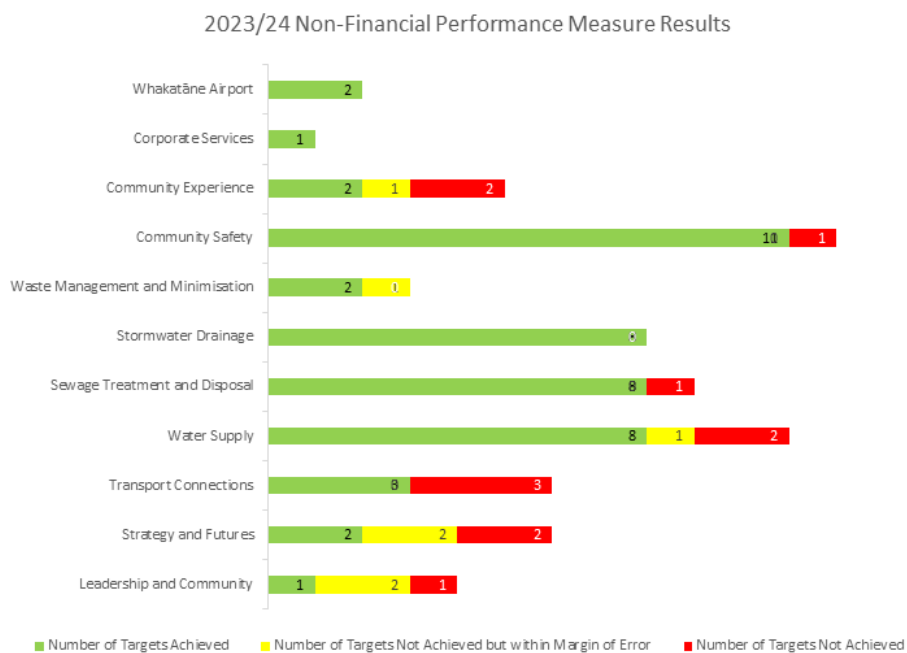
OVERVIEW OF OUR NON-FINANCIAL PERFORMANCE



■ Target Achieved ■ Target Not Achieved (with Margin of Error) ■ Target Not Achieved

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)



In summary our performance measure results show that:

- Council met target for 71 percent of all performance measures
- Overall, 53 percent of residents were satisfied with services received from the Whakatāne District Council on par with 54 percent for the whole of New Zealand.
- 60 percent of our measures relating to residents satisfaction of a service or facility met target
- 82 percent of the mandated measures were met

The Statement of Service Performance has been prepared in accordance with Tier 1 PBE financial reporting standards, which have been applied consistently throughout the period, and complies with PBE financial reporting standards.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

LEADERSHIP AND COMMUNITY

Hautūtanga me te Hapori

Activities in this group:

- Local governance
- Iwi, hapu, whānau relationships
- Community engagement
- Community development

Contribution to Council's vision and community outcomes:

- Constructively and collaboratively engaging with Iwi, Hapū and Whānau
- Strong, connected, interdependent, diverse communities.

This group of activities provides open, effective, and accountable governance for the district and supports connected and inclusive leadership for our communities. We are committed to partnering with, and supporting the aspiration of Iwi, Hapū and Whānau. We acknowledge the value of doing this, and the resulting positive outcomes for all communities.

We also work with local interest groups, stakeholder groups, the general public, central government, neighbouring Councils and others, because it helps us keep in touch with the priorities of our communities, and because it presents significant opportunities to deliver better outcomes for the district.

| |
|------------------------------|
| ? Capital Expenditure |
| ? Operating Expenditure |
| 1/4 performance measures met |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What's happened this year?

Live Streaming Council Meetings



The refurbishment of the Civic Centre in 2023 involved the installation of new technology which has enabled live streaming from the Council Chambers. Whakatāne District Council began live streaming meetings, via its YouTube channel, in February 2024. The purpose of live streaming is to provide people in our communities' greater opportunity to see the decision-making process as it happens and understand the context behind decisions. Live streaming delivers greater transparency and access to local government and democracy. Anyone is able to visit the Council's YouTube channel and watch in real-time the Council and Standing Committee meetings.

Murupara Community Board



The Murupara Community Board welcomed three new members through-out the year. The Ward is split into three subdivisions. Murupara has three members, Galatea- Waiōhau has two, and Te Urewera has one for election onto the Board.

In September 2023 the Murupara subdivision welcomed Memory Edmonds and Sheena Jones. Both candidates were nominated for the two vacancies and were elected unopposed through a by-election. They replaced two members who had resigned.

In April 2024 a by-election was required for one vacancy for the Galatea-Waiōhau Subdivision. The by-election was conducted by postal vote under the provisions of the Local Electoral Act 2001 and the Local Electoral Regulations 2001 and was undertaken by Election Services, under contract to Whakatāne District Council. Jesse Morgan-Ranui was elected to the Murupara Community Board (Galatea-Waiōhau Subdivision) in May 2024.

Implementing our Te Toi Waka Whakareī Strategy



In our Annual Plan we committed to implementing our Te Toi Waka Whakareī Strategy. Highlights from this year include Whakatāne becoming a Reorua bilingual centre, the establishment of the Reorua ki Whakatāne Fund, and the establishment of the Iwi Policy hub governance group with four of our Iwi to utilise better off funding.

Whakatāne becomes a reorua/bilingual centre

In September 2023 Whakatāne became a reorua/bilingual centre in a partnership between Te Rūnanga o Ngāti Awa and Whakatāne District Council. Whakatāne Reorua provides more opportunities for people to learn and practice te reo Māori in an inclusive and supportive environment. Te Rūnanga o Ngāti Awa and

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Whakatāne District Council leadership teams have been working to establish Whakatāne Reorua as another way to strengthen the cultural fabric of the town.

The initiative is supported by Aotearoa Reorua*, a national movement that supports towns and cities across New Zealand to become bilingual centres. Iwi partners and Councils work together to develop a bilingual strategy for their centre to create more spaces, places, and opportunities where te reo Māori is seen, heard, and celebrated alongside the English language.

*Aotearoa Reorua is led by the Department of Internal Affairs with support from Te Puni Kōkiri, Te Taura Whiri i te reo Māori and Te Mātāwai.

Reorua ki Whakatāne Fund

The Reorua ki Whakatāne fund was established to promote the use of the Māori language in Whakatāne. This is a contestable fund available to not-for-profit organisations and locally owned businesses in Whakatāne. The aronga/purpose of this fund is to support bilingual events and activities that help Whakatāne and Ngāti Awa meet the Reorua ki Whakatāne goals. Administered by the Whakatāne District Council in partnership with Te Rūnanga o Ngāti Awa, this fund is part of the broader Aotearoa Reorua movement.

The first tranche of funding, which opened in March 2024, received 13 applications from businesses, community groups, and individuals for projects aligned with the initiative's goals of enhancing community benefits and fostering bilingualism. Applications included plans for educational purposes, tikanga awareness building, Matariki celebrations, a Te Putake o Te Riri commemoration, succession plans, wānanga, resources relating to kōrero and a pōhiri for the launch of Te Puāwaitanga o te Rangatahi. Projects included educational programs, tikanga awareness initiatives, and cultural events. The second tranche of funding opened for applications in late May 2024. Reorua ki Whakatāne Fund helps revitalise and celebrate te reo Māori in our rohe/district.

***Ka tau atu te tangata
ki Whakatāne ka
rangona te wairua
me te reo o Wairaka i
raro i te korowai o
Ngāti Awa.***

***Within the warm
embrace of Ngāti
Awa the spirit and
welcoming voice of
Wairaka resonates for
all in Whakatāne.***

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Ā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | Margin of Error | TARGET | Comment |
|---|------|------|-----------------|--------|---|
| Percentage of users of the Whakatāne.govt.nz website that remain engaged. | 82% | 87% | NA | 77% | <p>We reached our target for engagement for this period. We are seeing a downward trend in the data as there has been an increase in short spikes and underlying 'bot' traffic that skews the long-term averages. Research is ongoing to find the best method to address this in reporting.</p> <p>Projects on the website included the launch of Live Streaming of Council meetings, Online Property File development and testing with stakeholders and improvements to our civil defence event website processes.</p> |
| Overall satisfaction with performance in communicating with residents and ratepayers. | 42% | 45% | ±4% | 47% | <p>For the third year running Council did not hit its performance target of 47%.</p> <p>Overall in 2024, 42% of residents were satisfied with Council's performance in communicating and consulting with the public, with no significant trends over time. However, there were noted differences based on both age and area.</p> |
| User satisfaction with Council's Customer Service front desk. | 73% | 75% | ±6% | 76% | <p>Satisfaction with customer service contact in 2024 (73%) was similar to 2023. The gradual downward trend over the last four years was not statistically significant and although the performance measure has not been met, it is still within the margin of error.</p> |
| Overall satisfaction with services received from the Whakatāne District Council. | 53% | 61% | ±4% | 54% | <p>In 2024, over half of residents (53%) were satisfied with overall services received from the Whakatane District Council (on average rating 5.7 out of 10). The current result was lower than 2023 (61% satisfied, average 6.1 rating). Although the result is down on last years, it is on par with both the national (54%) and District Council (56%) averages.</p> |

LEGEND

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Achieved  Not achieved (but within MOE ±%)  Not achieved 

What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

STRATEGY AND FUTURES

Ngā Rautaki me te tirohanga ki Anamata

Activities in this group:

- Strategy and policy
- Economic development and regeneration
- Includes Council Controlled Organisation TOI EDA
- Resource management – policy
- Contribution to Council’s vision and community outcomes:
- Strong, connected, interdependent, diverse communities
- Integrating nature into our decision-making
- Thriving circular economies
- Constructively and collaboratively engaging with iwi, hapū and whanau.

| |
|------------------------------|
| \$0 Capital Expenditure |
| ? Operating Expenditure |
| 2/6 performance measures met |

This group of activities develops strategies, plans and policies to address the challenges and opportunities facing our district- such as climate change, housing demand and land use planning, and economic development. As the needs of our district and communities change, we aim to meet these evolving needs, and work towards a future that is important to all of us

What’s happened this year?

Long Term Plan 2024- 2034



The Long Term Plan, a critical requirement under the Local Government Act, serves as a comprehensive 10-year work programme and budget and includes specific funding and financial management policies and plans.

Council reviewed its vision, community and strategic priorities through a series of workshops and an LTP pre-engagement process. Council sharpened the pencil on its strategic priorities from eight down to five setting the framework for a thorough review of Councils Levels of Service (LoS) and opportunities for improvement. These 5 priorities are as follows,

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)



In June 2023, discussions with the community about the Long Term Plan 2024- 2034 commenced to talk about Council's proposed five strategic priorities and find out what's important when planning for the next 10 years. More than 360 submissions were received, which was the most Council had ever received during the early stages of developing a Long Term Plan.

Councils across Aotearoa New Zealand, including ours, are grappling with rising inflation, increasing costs, and critical infrastructure needs, leading to higher rates increases. Despite previous efforts to keep rates low, a funding gap has emerged, exacerbated by an unsustainable funding model that relies heavily on ratepayers. Against this challenging backdrop, Council has been prudent in keeping its focus on our communities to understand what matters most in developing the next Long Term Plan.

Council received almost 1,000 submissions from individuals and groups and heard from approximately 80 submitters during public hearings that occurred in April and May 2024. There was a clear message from many submitters that 'times are tough'. Council is acutely aware of the need to balance the extremes of delivering only basic services, with its requirement to plan for thriving, vibrant communities that will serve future generations.

Key decisions made through Long Term Plan include:

- The prioritisation of health and safety improvements up to \$7.8 million in value over the next four years for the War Memorial Hall and Rugby Park, and development of a master plan an external funding plan for redevelopment of the Rex Morpeth Recreation Hub.
- Retaining the status quo for kerbside collection, rather than introducing a new kerbside foodwaste collection service.
- Closing the funding deficit (caused by significant inflationary increases) over a six year period.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

- Lowering the fixed portion of rates (Uniform Annual General Charge) to 20 percent to address cost of living increases and better reflect the ability of lower-value property owners to pay.

The adoption of the 2024-34 Long Term Plan was anticipated to be completed by June 30, 2024 but faced a delay due to an extended independent audit process. This was partly due to the coalition government's change in direction on Three Waters legislation late last year resulting in the Council needing to bring its Three Waters programme back into the LTP late in the development of the plan.

NB: The Long Term Plan 2024 – 2034 was adopted on August 5, 2024

Ensuring our infrastructure, facilities and services have capacity for growth.



One of Council's core priorities throughout the previous and current financial years has been progressing the development of the Our Places – Eastern Bay of Plenty Spatial Plan. The Plan will set out where and how we can grow across the Eastern Bay of Plenty to accommodate population and employment growth in a positive way, while contributing to our social, economic, environmental, and cultural wellbeing.

Partners in this collaborative project include the Eastern Bay of Plenty councils, Iwi authorities and Central Government agencies. Building effective and enduring partnerships will ensure that the needs and development aspirations of all Eastern Bay of Plenty communities are understood, and the plan is focused on the most important community interests within the sub-region.

The challenging natural geography of the subregion, increasing demand for housing, increasing demand for existing infrastructure, and further development of economically important industries require solutions based on collaborative partnerships. It is also important to manage growth so that we achieve appropriate well-being outcomes that enable communities to live and access the lifestyle they want.

Development of the Spatial Plan will help communicate the Eastern Bay of Plenty's priorities to influence investments and activities undertaken by Council and the other partners to the plan. We expect to complete the plan in mid to late 2025.

During the 2023/24 financial year, the following key activities have been undertaken:

- Three waters assessment and transport assessment of development options
- Finalising a draft development options report
- Initial Friends of Our Places stakeholder meeting
- Planning for public engagement in late 2024

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)**Making room to grow – Proposed Plan Change 8**

In 2021, the owners of 12 Huna Road approached Council because they wanted to develop their property. There was a strong strategic case for Council to develop this as a public plan change, allowing it to be rezoned and enable housing to provide for growth that meets the requirements under the National Policy Statement Urban Development. In addition, neighbouring properties have been included at their owners' request.

A concept plan for the development has been completed as well as the supporting technical work. The change will provide for a diverse range of housing, including Papakāinga housing, and a coordinated approach to the development of infrastructure. Papakāinga housing emphasises communal living and shared resources, creating a vibrant and supportive environment for residents. Kawarehe Trust, which owns the neighbouring land, Te Tohu o te Ora o Ngāti Awa, Ministry of Housing and Urban Development and Council have worked together to plan for housing solutions that will meet the needs of Trust beneficiaries, whānau and the wider community.

In December 2023 the Environment, Energy and Resilience Committee approved the public notification of Proposed Plan Change 8, with the submissions and further submissions periods in February 2024 and May 2024, respectively. Council staff are now working through these and preparing for a hearing.

The Whakatāne District Plan has gone digital

A district plan serves as a key document, offering crucial policy guidance and regulatory frameworks for land development and usage. Councils throughout the country were tasked with improving accessibility for district plans, with the Ministry for the Environment mandating all councils to have an online interactive plan that met the requirements of the National Planning Standards.

In May 2024 an ePlan tool was launched enabling access to information from the District Plan on any device. The ePlan allows users to pinpoint relevant information easily, with intuitive search functions and customisable filters, making it easier to do business with Council in the regulatory space. Users can search for a specific property and use filters to narrow down the relevant parts of the District Plan they want to view. While the structure was rearranged to meet the requirements of the National Planning standards, the content of the District Plan did not change. Previously, the District Plan could only be accessed through separate maps in hard copy form or as a series of PDF documents.

Whakatāne Climate Pathway

Whakatāne District Council is committed to addressing the impacts of climate change and building community resilience. In 2020 it adopted its first Climate Change Strategy which set targets for both the organisation and wider district. In 2023 the strategy underwent a comprehensive review. This was a robust process that involved a technical advisory group, a steering group, as well as public consultation in

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

August – September 2023 and again in April – May 2024 to gather feedback and input. The result is a pathway that helps Council and community partners work together to shape sustainable, low-emission, climate resilient communities.

The Council's adoption of the revised strategy in June 2024 signifies a commitment to supporting and facilitating the actions rather than asserting ownership. The Council acknowledges that achieving the strategy's targets requires a concerted effort from the entire community. While the Council will play a crucial role, it recognises that broader community engagement and action are essential. The supporting plan includes a broad range of actions from 'buying local and seasonal' to 'active travel to work or school' which the community can work towards collectively.

Our Climate Pathway defines a vision to deliver on our community's climate change aspirations, covering both adaptation (enhancing our resilience to a changing climate) and mitigation (significantly reducing our greenhouse gas emissions) and is available on our website [Our Climate Pathway | Whakatāne District Council \(whakatane.govt.nz\)](https://www.whakatane.govt.nz/our-climate-pathway).

Community Events - Light Up Whakatāne and Local Wild Food Festival

The Local Wild Food Festival and Trust Horizon Light Up Whakatāne are important events in the Whakatāne District and Council is proud to provide leadership, coordination and sponsorship of these two key events which reflect our people and place. Both these events are finalists in the NZ Event Awards and it is planned that their success will continue for years to come.

Trust Horizon Light Up Whakatāne celebrates the arts through an interactive light art trail and community festivals that focus on local music and dance. This event's purpose is to bring the community together in the town centre and it is a collaborative effort by Arts Whakatāne, EPIC town centre group and Whakatāne District Council, held over ten nights from 28th July to 6th August 2023. Under the darkness of winter, light activations and digital displays by local and regional artists illuminated the Whakatāne CBD bringing light and joy to the community. A huge amount of community support from sponsors, funders, artists, performance groups, hapū, schools, businesses and community organisations contributed to the success of this event.

The Local Wild Food Festival took place in February 2024 at Mahy Reserve, Ōhope. The festival focuses on celebrating our natural food abundance and encourages the community to create dishes, taste local delicacies and learn about wild and local foods that are available in our rohe. The festival was supported by budding amateur chefs, judges, cooking demonstrations, hapū, school groups, environmental organisations and more- many of whom give their time for free. There was a challenge element to the food festival with prizes up for grabs across multiple categories. Participants were asked to create a dish using at least one wild food ingredient- from the land, sea, river or lake. Mahy Reserve provides a relaxed atmosphere with live music, food trucks, local food demonstrations and markets.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)**Wharfside at Port Ōhope – boosting revenue for local businesses**

Wharfside is one of several activations managed by Whakatāne District Council Tourism and Events to stimulate the visitor economy. The harbourside hub, situated at the Eastern end of Ōhope, meets demand from visitors staying nearby at the Ōhope Beach Top 10 holiday park, Ōhope Beach Resort and holiday homes. Over the summer period the popular spot hosted a variety of food trucks, Dream Bean coffee, Paddleboard and e-scooters hire, Mata Brewery, and a pop-up isite. An example of a business that experienced a boost in revenue over the summer period was Mata Brewery which operated a successful pop-up bar at Wharfside and reported its best summer to date. Wharfside is also a popular destination for events such as the Tio Ōhiwa Oyster Festival and the Tamariki Food Fair. Investment in this space will mean more opportunities for events and tourism.

During the summer season, marketing activity focused on attracting new visitors and encouraging holiday makers to spend more in town. Despite the challenging economic climate, the visitor market remained buoyant, with the return of international visitors boosting spend figures. Total visitor spend for the Whakatāne District increased 4.3% to \$145.6 million for the year ending 31 January. The retail sector benefits most, making up 72% of the visitor dollar with hospitality following at 17%.

Attracting more visitors outside the peak summer period is a priority for the Tourism and Events team. Events, such as the Local Wild Food Festival, which attracted 2300 people, including 45% from out of town, highlight the effectiveness of these initiatives.

TOI EDA – Council Controlled Organisation

Toi-EDA is the Economic Development Agency for the Eastern Bay of Plenty and is based in Whakatāne. It is a partnership between Kawerau District Council, Ōpōtiki District Council, Whakatāne District Council, and the Bay of Plenty Regional Council, working together with local Iwi. Toi-EDA undertakes activities to contribute to the sustainable growth and development of the local economy. Toi-EDA's purpose and vision is to grow the Eastern Bay of Plenty: Tini o Toi – kia tipu, kia puawai (To create, grow and blossom the myriads of Toi).

Council and Toi-EDA collaborated on various initiatives throughout the year including the reviewing of the Eastern Bay of Plenty Economic Development Strategy 2018 (in conjunction with Opotiki DC, Kawerau DC, Bay of Plenty Regional Council) to prepare for new rounds of PGF funding applications

The Bay of Plenty Aquaculture Group hosted their inaugural Bay of Plenty Aquaculture Summit in August 2023 in Whakatāne. This event was supported by TOI EDA, Whakatāne District Council, Bay of Plenty Regional Council, WSP and the Ministry of Primary Industries.

The Rebel Business School, a social impact organisation, ran a local business startup programme in Whakatāne in November and December 2023. This was a 10 day course which had an uptake of 37 participants, including 70% from Māori businesses. Partners for this initiative included Ministry of Social Development, Toi EDA, Whakatāne District Council, Ministry of Pacific Growth and Te Wānanga o




7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Aotearoa. At the conclusion of the programme, a trade show was held to enable participants to setup a stall and promote their new or growing business.

How we performed Tā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | Margin of Error (if applicable) | TARGET 2023/24 | Comment |
|---|--------------|--------------|---------------------------------|--|---|
| Preparation of the Future Development Programme | Not achieved | Not achieved | | Complete Eastern Bay Spatial Plan and Future Development Strategy | Note: The Spatial Plan is expected to be completed by mid to late 2025. Therefore, target for year three set in the 2021-31 Long Term Plan has not been met. Long Term Plan targets were set prior to the agreement of the project plan. |
| Progress made to develop District Plan changes | Achieved | Achieved | | Develop plan changes to ensure the District Plan remains responsive to local issues and is consistent with the requirements of the broader planning framework including the National Policy Statement for Urban Development. | National planning standards have been implemented and district plan is now electronic and on the website. Plan changes 4, 5 and 8 are all progressing. |
| Satisfaction with efforts to attract and expand business | 52% | 53% | ±5% | 57% | Lack of knowledge about Council's business promotion activity continued in 2024 (41% of residents were unaware, similar to 2023). Nevertheless, over half (52%) of residents providing a rating remained satisfied with Council's efforts to attract and expand businesses; consistent in recent years with no significant trends over time. |
| Satisfaction with efforts to promote tourism | 52% | 60% | ±5% | 63% | Satisfaction with business promotion was not significantly different across community board areas. However, residents aged under 65 remained less satisfied than those aged 65+ In 2024, 70% of respondents were able to rate Council's support of tourism promotion. 52% of these residents were satisfied with this service (5.7 average rating), representing a decrease from 2023 and continuing the downward trend measured since 2021. Notable differences were apparent in attitudes towards tourism promotion – with lower satisfaction outside Whakatāne-Ōhope, and among residents aged under 65. |
| Satisfaction with efforts to enable and promote events | 56% | 60% | ±5% | 61% | 56% of residents who provided a rating were satisfied with event promotion (average rating 5.8), slightly down from 2023 (but within the margin of error) but consistent with 2022. Previously measured differences in tourism promotion perceptions continued, with lower satisfaction among younger residents, and those from Tāneatua-Waimana and Galatea-Murupara. |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Achieved  Not achieved (but within MOE)  Not achieved 

What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

DRAFT

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

TRANSPORT CONNECTIONS

Ngā hononga waka

| |
|------------------------------|
| \$0 Capital Expenditure |
| ? Operating Expenditure |
| 3/6 performance measures met |

- Contribution to community outcomes:
- Strong, connected, interdependent, diverse communities
- Integrating nature into our decision-making
- Thriving circular economies.

This group of activities aims to provide a safe, reliable, and sustainable transport system that is accessible to everyone and caters to a variety of transport choices. This increasingly provides for pedestrians, cyclists, and the mobility impaired, alongside motorised vehicles. We aim to deliver a well-functioning transport system that keeps people and places connected, supports a vibrant economy, and allows for efficient day-to-day running of our communities.

Activities in this group:

Transport connections

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What's happened this year?

Mimiha Bridge



A new temporary bridge over the Mimiha Stream on the road to Ruatāhuna and Lake Waikaremoana opened in June 2024. Council, in partnership with Tūhoe, have been working collaboratively to design a replacement bridge that reflects the rich history of the area and aligns with the aspirations of the iwi. Funded through Waka Kotahi NZ Transport Agency, the project highlights how a partnership approach can result in a robust and successful outcome.

The original Mimiha Stream Bridge was built around 1945, following World War II, and is now at the end of its useable life. A karakia was held to bless the temporary bridge and mark its opening to traffic, a significant milestone in the planned upgrade of the aging bridge.

Tūhoe and Manawarū tribal authority see this project as not just about building a bridge; but about honouring the past and the future of their community. The new design will represent their history and vision for sustainable development.

The temporary bridge was built beside the existing bridge, and care has been taken to minimise impacts on the stream and nearby bush. One of the main aims of the project is to minimise the footprint on the taiao/environment, avoid the use of plastics wherever possible, and keep resources used and location of work front of mind. Mimiha Stream is close to a popular swimming hole and mahinga kai/food gathering site, and the area attracts many outside visitors.

The demolition of the old bridge is the next step in the process to make way for the construction of its contemporary replacement. The new bridge will include enhanced safety features and improved accessibility and ensure the needs of the communities that access the area are met".

The Mimiha Stream Bridge provides the only access to Ruatāhuna and Lake Waikaremoana from the Whakatāne District and the Bay of Plenty, and access will be maintained through the construction period.

The upgraded permanent bridge structure is expected to be completed early 2025.

Active Whakatāne Strategy



Our Active Whakatāne Strategy has seen the delivery of a range of projects throughout the 2023/24 financial year. These projects have made it safer and easier for transport users and have enhanced our streets by creating safe crossing points and encouraging traffic away from our residential streets.

As part of our Active Whakatāne programme we have been working to make active travel like walking, cycling, and scootering, safer and easier for everyone. During the 2023/24 financial year we:

Finance and Performance Committee - AGENDA

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Installed a raised crossing platform across the Salonika Street intersection for St Josephs and Allandale Primary schools and residents at the Disability Resource Centre.

Installed a raised crossing platform across Goulstone Road to allow safer access to Rex Morpeth Park, the Aquatic Centre, Rugby Park and schools.

Installed speedbumps, crossing platforms and narrowed the intersection on Pouwhare Street. This has made the route slower and has improved accessibility for mobility impaired users, cyclists, and walkers by providing them level access across roads and improved the amenity of the local residential area by encouraging traffic to travel through the arterial network.

Created a slow speed area and safe crossings outside Edgecumbe Primary and Edgecumbe College to reduce the risk to students and whānau in this busy area while providing additional parking capacity in this busy area. We also created a shared use path to encourage more active travel by school students.

These efforts under the Active Whakatāne Programme demonstrate our commitment to creating a safer and more accessible environment for active travel throughout our community.

**Landing Road Roundabout – Renewal and Upgrade**

The Landing Road roundabout is a vital link to both urban streets around Whakatāne and connecting arterial routes. The Landing Road Roundabout was due for renewal in 2023, having been in operation for over 40 years. Additional design and safety improvements were undertaken at the same time as the roundabout surface renewal in order to minimise disruptions to the public. Being a site with such high traffic volumes, a more durable surface with a longer life span was chosen, reducing future maintenance needs as compared with other road surfaces used in the district. Road works were undertaken in phases from September 2023 and were completed in December 2023.

Additional design and safety improvements were undertaken at the same time as the roundabout surface renewal in order to minimise disruptions to the public. Changes included installing pram crossings to better enable active mode access through the area and future proofing and relocating underground infrastructure services, including water and wastewater pipes by relocating services to the berm areas so access to these services in the future will not impact the road surface.

The completion of this upgrade, saw a new stacking lane established for traffic turning left off the bridge onto Landing Road. The stacking lane is designed to provide additional waiting room for cars to 'stack' as they wait their turn, improving safety and traffic flow. Additionally, traffic can now enter Landing Road via a right turn at the roundabout from Hinemoa Street replacing the old tear drop layout, doing so is expected to encourage traffic off residential streets, such as Victoria Ave, and on to the arterial network improving safety and amenity on residential streets. The new layout was ready ahead of the December – January holiday season and the last of the asphaltting, line marking and landscaping of the roundabout was completed in early 2024. The project has become a finalist in the Civil Contractors New Zealand (CCNZ) award for projects valued \$2- \$5M.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | Margin of Error (if applicable) | TARGET 2023/24 | Comment |
|---|-------|-------|---------------------------------|--|--|
| Satisfaction with Council roads | 48% | 48% | ±4% | 57% | The recent trending decline in satisfaction with roads finally stabilised in 2024, with satisfaction at 48% - consistent with 2023. • It is worth noting that satisfaction with roads has been declining nationwide in part reportedly to the increased frequency of extreme weather events and the reported presence of potholes across New Zealand. • On average, residents in Tāneatua-Waimana were less satisfied with both roads and road safety. |
| The average quality of ride on a sealed local road network, measured by smooth travel exposure (M) | 94% | 94% | NA | Above 90% | A measure of the quantity of roads meeting the national standard for smooth travel, based on the measure of roughness for different road classifications. |
| Percentage of sealed local road network that is resurfaced (M) | 7% | 5% | | 6-7% | We have a three-year program of resurfacing sealed roads. We have achieved our target over the three-year period despite the dip in Year 2. |
| Percentage of qualifying footpaths within the district that fall within the level of service or service standard for the condition of footpaths set out in the Activity Management Plan (M) | 97% | 100% | | 95% of all qualifying footpaths achieve a grade of three or less as measured through the three yearly footpath inspections | 97% achieved grade 3 or less as measured in the 3 yearly footpath condition rating survey. This survey was conducted in 2023 and will apply to the next 3 years, this is year one. It will be carried out again in 2026/27. |
| Percentage of emergency customer service requests relating to roads and footpaths responded to within two hours (M) | 84.4% | 90.5% | | 90% | Due to a period of significant vacancies in our in-house transport team, we went through a period where the customer service targets were not being updated our service request system in time. The import point to note is resource priority was given to actually |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | Margin of Error (if applicable) | TARGET 2023/24 | Comment |
|--|-------|-------|---------------------------------|----------------|--|
| Percentage of all other customer service requests relating to roads and footpaths responded to within seven days (M) | 90.89 | 95.7% | | 95% | responding to the matter that the customer service request related to. These were generally responded to in time, although updates in the system were not. We have filled most of these vacancies over the last two quarters and are seeing this result trending back towards the target. We expect this measure to be back on target by quarter 1 of 2024/25. |

(M) – This performance measure is mandatory for all Councils to report on, set under the ‘Non-Financial Performance Measures Rules 2013’ in accordance with section 261b of the Local Government Act 2002.

LEGEND

Achieved



Not achieved (but within MOE)



Not achieved



What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

PLANNING FOR THREE WATERS:

Three Waters Consent Replacement Strategy

Council owns, operates, and maintains three waters infrastructure: municipal water supply, stormwater, and wastewater across urban areas within the Whakatāne District. Our three waters infrastructure, is separated into three Groups of Activities:

- Water Supply
- Stormwater
- Wastewater

In the Annual Plan 2023-2024 we deferred three waters infrastructure projects to the Long-Term Plan 2024-2034. Despite this deferral, planning for these future projects has remained a key priority focus for Council this past year. The change in government and its repeal of the Water Services Reform has impacted the way we plan to deliver three waters.

The Water Services Reform under the previous government was an initiative aimed at transferring three-waters assets from local councils to regional entities, placing financial responsibilities on these regional bodies. This transition was part of a proposed move towards centralised funding and financing arrangements. However, with the recent change in government and the repeal of the Water Services Reform, three waters assets are expected to remain under council ownership. This reversal has reinstated significant funding pressures, exceeding what the community can afford via rating increases.

The country is facing serious challenges with an estimated \$120- \$180 billion investment¹ required over the next 30 years to upgrade three waters infrastructure that will meet modern legislative requirements, as well as community and cultural expectations. Many of our resource consents for our three waters infrastructure were issued under the Resource Management Act 1991("RMA") following its enactment. These consents are set to expire in the near future and are the primary driver for needed upgrades. For the Whakatāne District, we will need to replace consents associated with four wastewater treatment plants, thirteen water take consents and various stormwater discharges across several urban areas. These upgrades will come with a significant financial cost to the community, estimated at around \$200

¹ Te Tari Taiwhenua, Internal Affairs. (June 2022). Three-waters-reform-case-for-change-and-summary-of-proposals-15-June-2022.pdf (dia.govt.nz)

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

million to upgrade facilities with increased ongoing operational costs associated with more advanced infrastructure.

In May 2024, Whakatāne District Council's Infrastructure and Planning Committee approved the Three Waters Consent Replacement Strategy, which outlines the Council's approach to renewing resource consents for drinking water and wastewater. The Council is already underway with a plan for stormwater management and has lodged a comprehensive consent that will cover stormwater discharges in the Whakatāne township catchment. Similar consents for other schemes will start gradually over the next five to 10 years. The Three Waters Consent Replacement Strategy aims to ensure the Council meets its regulatory obligations, environmental responsibilities, and community expectations for the three waters services while delivering this large work programme as efficiently as possible.

The Council has allocated \$3.5 million in the draft Long-Term Plan 2024-34 for the consent renewal program, with the planning, consenting and design aspects expected to take three to five years to complete.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

WATER SUPPLY

Ngā puna wai

Outcomes:

- Strong, connected, interdependent, diverse communities
- Integrating nature into our decision-making
- Thriving circular economies
- Constructively and collaboratively engaging with Iwi, hapū and whānau.

This group of activities provides safe, reliable, and sustainable water supplies to our district. This currently includes provision to over 12,500 properties for domestic, industrial, commercial, and agricultural use. With large areas of our district being rural, and in some cases isolated, many households have independent systems supplying their own needs. Water is also provided for urban firefighting requirements.

Activities within this group:

- Water supply

\$? Capital Expenditure

? Operating Expenditure

8/12 performance measures met

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What's happened this year?

Enhancing our Water Treatment Plants

Providing clean and safe drinking water to Whakatāne communities is a top priority for Council. This year we made upgrades and enhancements to our operations at, the Braemar Water Treatment Plant, Te Mahoe Water Treatment Plant and the Murupara Treatment Plant.

A major and innovative upgrade of the Braemar Water Treatment Plant was completed in February 2024. Representatives from Ngāti Awa, Ngāti Rangitīhi, Tuwharetoa ki Kawerau and Ngāti Makino the entities who have manawhenua in the Rangitāiki rohe were acknowledged for their guidance and support of this transformational project.

The plant provides water to communities across the Rangitāiki Plains from the Tarawera River to just outside the Whakatāne township. However, the water in its natural state does not align with the New Zealand Drinking Water Standards which is why a new innovative treatment plant was built.

The \$6.3M project took just over a year complete and was carried out with assistance from central government's Three Waters stimulus funding (\$1.35M). Ultra-violet light purification and pH (acidity) treatment have been included in the upgrade to provide a supply that complies with current New Zealand Drinking Water Standards. The new plant is now able to meet the compliance standards and while current demand peaks at around 6500 cubic metres, it has ability to extend to up to 15,000 cubic metres a day,

In March 2024, the addition of UV disinfection treatment was introduced to the Te Mahoe water treatment plant to enhance the safety of the water supply. UV disinfection provides an additional barrier against viruses, bacteria and protozoa.

In December 2023, an automated chlorine dosing system was installed at the Murupara water treatment plant. Chlorine is used to protect drinking water supplies from contamination against harmful micro-organisms.

This is a temporary measure until a water treatment plant facility can be built and commissioned in the future. Council is working with Ngati Manawa and community stakeholders for future planning.

Water meter installation – Matatā

In November 2023 work began on installing meters on all connected properties within the Matatā water scheme boundary. Water meters allow for more effective and efficient identification of leaks, as many underground leaks go undetected without proper monitoring. This project was undertaken as the

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

previously unmetered supply in Matatā indicated high water usage, that being double the national average household use for metered supply.

As households are metered Council will be able to locate and fix water loss in the system more effectively. The system for charging for water did not change in the short term with property owners continuing to be charged a supply fee included in the land rates, rather than per cubic metre of water used.

Smart Meters

Council began rolling out smart meters for the ongoing renewal of water meters in late 2023. This will enable a meter reading to be able to be taken/automated from a slow driving vehicle. This will improve health and safety for meter readers, and improve efficiency.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi




| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | Note | TARGET 2023/24 |
|---|---------------------|---------------------|---|---|
| The extent to which Council's drinking water supplies comply with Part 4 of the Drinking Water Standards (bacteria compliance criteria) (M) | 1 schemes compliant | 3 schemes compliant | Note: Please refer to the assessment summary table for a breakdown of compliance by scheme. | All schemes compliant of 9 |
| <i>WAITING ON WAICOMPLY AUDIT report then can add info to Annual Report</i> | | | | |
| The extent to which Council's drinking water supplies comply with Part 5 of the Drinking Water Standards (protozoal compliance criteria) (M) | 1 scheme compliant | 1 scheme compliant | Please refer to the assessment summary table for a breakdown of compliance by scheme | 8 schemes compliant of 9 |
| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | Target | Comment |
| The total number of complaints per 1,000 connections, received by the Council about any of the following: Drinking water clarity Drinking water taste Drinking water odour Drinking water pressure of flow Continuity of supply The Council's response to any of these issues (M) | 14.14 | 16.3 | Less than 30 overall | |
| Satisfaction with the water supply and quality of drinking water (supplied by Council) Note: Margin of error ±4% | 62.5% | 72% | 70% | In 2024, 4-in-5 residents (79%) reported being connected to Council's water supply (similar to 78% in 2023). • Of those residents on Council's water provision, 68% were satisfied with the supply overall (6.7 average rating), although decreasing from the recent peak of 76% in 2023. • Differences were apparent between areas, with satisfaction notably lower in Tāneatua-Waimana. Residents |

Finance and Performance Committee - AGENDA

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

| | | | | |
|--|--------------|--------------|----------------------|---|
| | | | | aged under 65 also remained less satisfied with Council's water supply than did older residents. |
| Median response time to attend urgent callouts for areas supplied by Council, from the time that the local authority receives notification to the time that the service personnel reach the site (M) | 0.47 hours | 0.6 hours | Less than 1 hour | |
| Median response time to resolve urgent callouts for areas supplied by Council, from the time that the local authority receives notification to the time that service personnel confirm resolution of the fault or interruption (M) | 2.55 | 2.92 hours | Less than 8 hours | |
| Median response time to attend non-urgent callouts for areas supplied by Council, from the time that the local authority receives notification to the time that service personnel reach the site (M) | 15.65 | 16.73 hours | Less than 24 hours | |
| Median response time to resolve non-urgent callouts for areas supplied by Council, from the time that the local authority receives notification to the time that service personnel confirm resolution of the fault or interruption (M) | 18.83 | 20.28 hours | Less than 48 hours | |
| Average consumption of drinking water per day per resident in the district for metered areas supplied by Council (M) | 419.6 | 430.8 litres | Less than 260 litres | A number of factors can contribute to council not meeting the target, including properties with internal leaks. As council is continuing to install water meters throughout the district a number of newly metered properties have shown to have previously undetected internal leaks. Meters are installed on properties in both urban and rural area and a number of farm connections are high water users. |
| Average consumption of drinking water per day per resident in the district for unmetered areas supplied by Council (M) | 344.9 litres | 345 litres | Less than 350 litres | |
| Percentage of real water loss from Council - networked reticulation system for metered schemes based on the standard International Water Association (IWA) water balance (M) | 13.6% | 20.7% | Less than 20% | |
| Note: Percentage of metered properties for water systems within the Whakatāne district: Whakatāne & Ōhope 100%; Plains 100%; Murupara 5%; Rūātōki 100%; Tāneatua 94%; Matatā 9%; Waimana 100%; Te Mahoe 100%. Council staff have been trained to undertake water loss data analysis based on industry best practice, utilising the International Water Association (IWA) methodology, Benchloss New Zealand software and Water NZ Waterloss Guidelines. Real water losses are dependent upon the size of a water supply system, water pressure, total length of pipes and whether metered or unmetered. Metered supplies use the recorded production volume and the consumption volume of water, with adjustments made for expected unavoidable water losses. Small, unmetered water supplies are calculated using minimum night flow assessment reduced by the estimated nighttime consumption. At times Council engages third-party consultants to review and validate Council data and processes. | | | | |
| Percentage of real water loss from Council-networked reticulation system for unmetered schemes (M) | 55.2% | 38.3% | Less than 60% | |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

LEGEND
Achieved  Not achieved (but within MOE)  Not achieved 

What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

DRAFT

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

SEWAGE AND TREATMENT DISPOSAL

Te rāwekeweke me te rukea o te parakaingaki

Outcomes:

- Strong, connected, interdependent, diverse communities
- Integrating nature into our decision-making
- Thriving circular economies
- Constructively and collaboratively engaging with Iwi, hapū and whānau

This group of activities provides the district with reliable and sustainable sewage treatment and disposal services. We aim to provide services to collect, treat, and dispose of wastewater in a safe and sustainable way that protects public health and doesn't compromise ecosystems.

Activities in this group:

Sewage treatment and disposal

? Capital Expenditure

? Operating Expenditure

8/9 performance measures met

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What's happened this year?

Matatā Wastewater Project



Our Matatā Wastewater Project aims to deliver a sustainable wastewater solution for Matatā that improves public health and community wellbeing, prevents, or minimises the adverse effects on the environment, reflects co-design principles, and is affordable to build and operate. The project is supported by Te Niaotanga o Mataatua o Te Arawa Co-design Group, which includes representatives from Te Mana o Ngāti Rangitīhi Trust, Tūwharetoa ki Kawerau, Ngāti Awa hapu (Ngāi Te Rangihouhiri, Ngāti Hikakino and Te Tawera) and our Council. Throughout 2023/24 we have continued working collaboratively on the co-design of the wastewater project, continued environmental monitoring of surface and ground water and ecological monitoring of invertebrates, and commenced testing of specific requirements and subsequent sites for possible land disposal and treatment.

Ferry Road wastewater pump station replacement and associated pipe network



The current pump station on Ferry Road is more than 60 years old and is deemed not fit-for purpose. Work commenced to upgrade the wastewater pump station and associated pipe network project in April 2024. Upgrading the existing wastewater pump station includes safety upgrades, electrical enhancements, and increased pumping capacity.

In addition to replacing the pump station, a 1.3km pipeline is being laid, known as a rising main (red line), this will connect the new pump station on Ferry Road to the Hinemoa rising main which conveys sewerage to the Whakatane wastewater treatment plant.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | MOE | TARGET | Comments |
|--|-----------|------------|-----|-----------------------|--|
| Satisfaction with the sewerage system for areas supplied by the Council | 75% | 77% | ±4% | 75% | 75% of these residents were satisfied with the sewerage system (average rating 7.5); consistent with results observed over recent years. Satisfaction was notably lower in both Tāneatua-Waimana and Rangitaiki. |
| Total number of complaints received per 1,000 connections about any of the following: - sewage odour - sewerage system faults - system blockages - the Council's response to any of these issues (M) | 8 | 10.88 | | Less than 40 | |
| Median response time to attend a sewage overflow resulting from a blockage or other fault in the Council's sewerage system, from the time that the Council receives notification to the time that service personnel reach the site (M) | 0.51hours | 0.67 | | Less than 2 hours | |
| Median response time to resolve a sewage overflow resulting from a blockage or other fault in the Council's sewerage system, from the time that the Council receives notification to the time that service personnel confirm resolution of the blockage or other fault (M) | 4.26 | 3.75 hours | | Less than 8 hours | |
| Number of dry weather sewage overflows from the Council's sewerage system per 1,000 connections to that sewerage system (M) | 4 | 0.86 | | Less than 3 overflows | |
| Number of abatement notices received by the Council in relation to the resource consents for discharge from our sewerage systems (M) | Zero | Zero | | Zero | |
| Number of infringement notices received by the Council in relation to the resource consents for discharge from our sewerage systems (M) | Zero | Zero | | Zero | |
| Number of enforcement orders received by the Council in relation to the resource consents for discharge from our sewerage systems (M) | Zero | Zero | | Zero | |
| Number of convictions received by the Council in relation to the resource consents for discharge from our sewerage systems (M) | Zero | Zero | | Zero | |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

DRAFT

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

STORMWATER DRAINAGE

Te awakeri o te wai āwhiowhio

Outcomes:

- Strong, connected, interdependent, diverse communities
- Integrating nature into our decision-making
- Thriving circular economies
- Constructively and collaboratively engaging with Iwi, hapū and whānau

? Capital Expenditure

? Operating Expenditure

8/8 performance measures met

This group of activities helps protect people and property from the impacts of flooding as well as protecting public health from the potentially adverse effects of stormwater run-off. Because stormwater is discharged into streams, rivers, and coastal waters, it needs to be as clean as possible. While we do not treat stormwater run-off, we monitor stormwater discharge to ensure it meets the required standards. Alongside our stormwater activity, river stop banks are managed by Bay of Plenty Regional Council with the similar objective of protection from the impacts of flooding.

Activities:

- Stormwater drainage

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What's happened this year?

Whakatāne Stormwater 2050



Council are reviewing the management of stormwater including the quantity and quality of runoff. This is driven in part by the need to obtain a Comprehensive Stormwater Consent (CSC) for the Whakatāne urban area. Council is using this as an opportunity to review the overall stormwater management system for Whakatāne to plan for a stronger, more resilient system.

The Council is already underway with a plan for stormwater management and has lodged a comprehensive consent that will cover stormwater discharges in the Whakatāne township catchment. Similar consents for other schemes will start gradually over the next five to 10 years.

Hinemoa Stormwater improvements



As we experience more frequent heavy rainfall events, it's important our stormwater management systems are fit-for-purpose too. The Hinemoa Street stormwater pump station, while once sufficient, now falls short of modern standards, especially with the increasing intensity of rainfall events. This poses a flooding risk to lower-lying properties, requiring an upgrade to ensure future resilience.

Council began upgrading the stormwater infrastructure in the Hinemoa Street area to address the limitations of the existing pump station, which currently cannot effectively service its 139-hectare catchment. The project includes relocating and upgrading the pump station and installing new stormwater pipes on Armstrong Avenue and Henderson Street.

The new pump station, which will be constructed at the back of James Street School's field, is designed to handle a one-in-ten-year local rainfall event, providing enhanced protection to vulnerable properties. This location was chosen due to the restricted space at the current site.

These upgrades are essential in response to the increasing frequency and intensity of heavy rainfall events. The existing pump station no longer meets modern standards, posing a flooding risk to lower-lying properties. The improvements will ensure the stormwater management system is resilient and fit for future conditions. The project won't be completed until the next financial year.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | MOE | TARGET | Comments |
|--|-------------------|-------------------|-----|-------------------|--|
| Number of flooding events in the District | No flooding event | No flooding event | | Less than 3 | Note: The DIA requires results for these measures to be presented according to the following definitions: 'Flooding event' - an overflow of stormwater from a territorial authority's stormwater system that enters a habitable floor. 'Stormwater system' - the pipes and infrastructure (excluding roads) that collect and manage rainwater run-off, from the point of connection to the point of discharge. |
| For each flooding event, the number of habitable floors affected (per 1,000 properties connected to the Council's stormwater system) | No flooding event | No flooding event | | Less than 10 | Note: The DIA requires results for these measures to be presented according to the following definitions: 'Flooding event' - an overflow of stormwater from a territorial authority's stormwater system that enters a habitable floor. 'Stormwater system' - the pipes and infrastructure (excluding roads) that collect and manage rainwater run-off, from the point of connection to the point of discharge. |
| The median response time to attend a flooding event, measured from the time that the territorial authority receives notification to the time that service personnel reach the site | No flooding event | No flooding event | | Less than 3 hours | |
| The number of complaints received about the performance of the stormwater system, expressed per 1,000 properties connected to the territorial authority's stormwater system | 6.02 | 8.5 | | Less than 10 | |
| Number of abatement notices received by the Council in relation to the resource consents for discharge from our stormwater system | 0 | 0 | | Zero | |
| Number of infringement notices received by the Council in relation to the resource consents for discharge from our stormwater system | 0 | 0 | | Zero | |
| Number of enforcement orders received by the Council in relation to the resource consents for discharge from our stormwater system | 0 | 0 | | Zero | |
| Number of convictions received by the Council in relation to the resource consents for discharge from our stormwater system | 0 | 0 | | Zero | |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

WASTE MANAGEMENT AND MINIMISATION

Te Whakahaere me te Whakaiti Para

Outcomes:

- Integrating nature into our decision-making
- Thriving circular economies

The Waste Management and Minimisation group is about protecting the health of people and the environment, by providing a reliable kerbside rubbish and recycling collection service and promoting waste minimisation and resource recovery. We aim to encourage and support waste reduction, reuse, and recycling through education programmes, and by providing the right infrastructure and services. Waste management must meet the requirements of several pieces of legislation, including the Waste Minimisation Act 2008, the New Zealand Waste Strategy 2010, and the Local Government Act 2002.

Activities:

- Waste management and minimisation

? Capital Expenditure

? Operating Expenditure

2/3 performance measures met

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What's happened this year?

Council is committed to improving waste management in our communities and is actively working on the 27 actions outlined in our Waste Management and Minimisation Plan. We continue to provide kerbside services to over 14,000 properties (89% of all rateable properties) and operate two refuse transfer stations along with a green waste composting facility.

Changes to Whakatāne District kerbside recycling



From 1 February, the Ministry for the Environment's standardising kerbside recycling strategy came into effect, which required all councils to collect the same items in kerbside recycling across Aotearoa. This meant most New Zealanders are able to recycle the same things, no matter where they live in the country. Whakatāne District residents since February have been able to add plastics graded 5 and empty pizza boxes to their kerbside collections. The additions now accompany plastics 1 and 2, cardboard, paper and tins and cans as items that can be recycled via kerbside collections. However, aerosol containers were removed from collection because it is difficult to safely process the pressurised cans.

Education and encouraging positive behaviour change



Despite growing concerns about the cost of food increasing year-on-year, Kiwi households are still throwing away more than \$3.2 billion worth of food every year. Food going off before it can be finished and before 'use by' and 'best before dates' are the top reasons for food waste, with bread, leftovers and fruit and vegetables listed as the top three most wasted items.

Whakatāne District Council is a participating Council of Love Food Hate Waste NZ, an initiative being run by 52 Councils across the mōtū in conjunction with WasteMINZ. Love Food Hate Waste NZ is working towards a goal of reducing household food waste by 50 percent by 2030. In March 2024 it launched its "Eat me First" campaign designed to tackle food waste head-on, turning awareness and concern into meaningful behaviour change through the use of reusable "Eat Me First" stickers. Whakatāne residents can order their "Eat Me First Stickers" from the Love Food Hate Waste NZ website, collect from the main Whakatāne District Council building on Commerce Street, Murupara Service Centre, Whakatāne Library Whakatāne Library.

Other waste education and behaviour initiatives that have occurred throughout the year include:

Providing waste education to 13 schools, 72 classes and 1402 students, as well as providing some recycling and composting bins

Distributing 17,000 free reusable produce bags, including distribution to 19 schools

Providing free recycling to 37 schools who have earned 526 native plants through our Paper for Trees programme

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Provided waste advice and support to 15 community events

Other things we have done:

- Upgraded our green waste composting facility
- Dealt with 1220 Requests for Service
- Worked with community organisations such as HALO, the Police, Early Education Centres and Riding for the Disabled on clean-ups
- Organised a staff clean-up of litter in the Ōhope Scenic Reserve
- Worked with other Bay of Plenty and Waikato councils on regional waste projects
- Undertaken major remediation works on two closed landfills

DRAFT

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | MOE if applicable | TARGET 2023/24 | Comments |
|--|-------|--------------------------------------|-------------------|--|--|
| Amount of waste sent to landfill per person* each year | 57.8% | 52.8% of the national average amount | | Below 70% of the national average amount | 427.57Kg per person sent to landfill, which is 57.8% of the national average. This is an increase on last year but still well below the national average |
| User satisfaction with refuse disposal (transfer station facilities) | 78% | 82% | ±5% | 82% | 78% of users were satisfied with these facilities (average rating 7.4), similar to 2023 but down from 2022 – while remaining above the NZ benchmark (60%). Satisfaction was notably higher in Galatea-Murupara. |
| User satisfaction with the kerbside waste collection service | 89% | 88% | ±3% | 89% | Most surveyed residents (89%) reported regular kerbside waste collection at their property in 2024 (consistent with previous years). • As in 2023, this remained the highest-rated service in 2024 with very high satisfaction (89%, 8.2 average rating) - one of the most consistent results across all service measures over time. • 1-in-3 (32%) respondents rated this service the maximum 10 out of 10. Compared with 67% NZ benchmark. |

*As per population estimates of the district provided by Stats NZ

LEGEND

Achieved Not achieved (but within) Not achieved

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

DRAFT

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

COMMUNITY EXPERIENCE

Ngā wheako hapori

Outcomes:

- Strong, connected, interdependent, diverse communities
- Constructively and collaboratively engaging with Iwi, hapū and whānau

| |
|------------------------------|
| ? Capital Expenditure |
| ? Operating Expenditure |
| 2/5 performance measures met |

This group of activities provides and maintains a range of services, spaces and facilities for community use, recreation, and amenity. We aim to provide activities and spaces that enhance the quality of life for our residents and visitors and that celebrate our beautiful District, arts, and culture.

Activities in this group:

- Recreation
- Community facilities
- Arts and culture
- Ports and harbour
- Whakatāne Holiday Park

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What's happened this year?

Arts, Culture and Creativity Strategy – Te Rautaki Toi, Ahurea me Auahatanga (the Strategy)

A thriving arts and cultural presence is essential to achieving Whakatāne District Council's Long Term Plan vision, 'more life in life'. To support this, Elected Members have adopted the first district-wide Arts, Culture and Creativity Strategy – Te Rautaki Toi, Ahurea me Auahatanga (the Strategy). The Strategy has been developed in partnership with the district's arts, culture and creative communities to guide our district's future investment in the arts, and was funded by Creative NZ. The Strategy was well received by Elected Members who acknowledged the passion and dedication of those involved in its development, including staff members, community creatives, volunteers and ngā toi Māori practitioners. The Strategy uses the waka hourua (twin hulled boat) as a framework to encourage, enhance, and support communities to have conversations about our past, present, and future through various forms of expression and creativity.

Life and Works of Tame Iti explored in Powerful Exhibition

Te Kōputu a te Whanga a Toi was proud to announce the opening of Thou Shalt Not, an immersive exhibition featuring the multifaceted works of renowned Māori artist and activist, Tame Iti. Thou Shalt Not, a title from Tame's memories as a young child being asked to recite the Ten Commandments at school, provided a unique glimpse into the distinguished artist's life through the dynamic range of works.

The reference to the Ten Commandments serves as a metaphorical framework for the exhibition, and a standout feature was the inclusion of iconic works, symbols of resistance and resilience. Tame Iti's nephew's horse blanket formed a vital part of his 1995 Fiscal Envelope submission to the Crown was one of many powerful representations of both his artistic endeavours and commitment to advocating for Māori rights.

Mr Iti was involved in the development of the exhibition and oversaw the daily progress within the gallery space. There were also opportunities for the public to catch Tame in action in the gallery studio space during one of his pop-in impromptu painting sessions. We encouraged members of the public to immerse themselves in Tame Iti's world, reflect on the historical narratives embedded in each piece of art, and stay open to the crucial dialogue woven through the works.

38th Annual Molly Morpeth Canaday Art Awards

Following weeks of preparation, in February 2024 staff at Te Kōputu a te Whanga a Toi / Whakatāne Library and Galleries put together the finishing touches on one the country's longest standing art accolades ahead of its opening weekend. Now in its 38th year, the prestigious Molly Morpeth Canaday

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Award 2024, run by Arts Whakatāne, encouraged and celebrated the development of fine art on a national level and supported both emerging and established artists from across Aotearoa New Zealand.

The event officially opened on Saturday the 6th of February evening with an award ceremony featuring a prize pool of \$25,000 donated from a variety of sponsors. The following day, the exhibition opened to the public where a stunning selection of sixty-two finalists work was displayed at Te Kōputu a te Whanga a Toi. Te Kōputu were thrilled to host the must-see exhibition which showcases an exciting selection of the contemporary art from across the motu. A total of 495 award entries were received their year which highlights the significance of the event. The exhibition showcases the talent amongst the New Zealand art community.

River access improvements to Wairaka Centennial Park

Improvement works to the river – edge of the Wairaka Centennial Park in Whakatāne commenced in late April 2024. The improved design was confirmed following a positive consultation process with tangata whenua, Wairaka Marae Whānau, local boating representatives and the wider community. The improvements allowed for safe, accessible stairs, and a ramp to be constructed in the area. Since opening in 2017, the playground and surrounding green spaces have been enjoyed by many, however the access steps to the Whakatāne River had concerns raised against them. Listening to community concerns, we undertook the removal of all intermediate steps and handrails from existing concrete terraces on the southern side of the river access area, removal of the perimeter wall of the river access area to below sand level, and the installation of wider concrete terraces with a lower gradient. Intermediate steps were then added between the terraces along with handrails. In addition, a new ramp was installed from the existing boardwalk through to the river access area at the base of the new steps, with handrails placed either side. The overall new design aims to improve the existing situation in terms of access, safety, cultural outcomes, environmental outcomes, and usability.

Annual over 80's Event

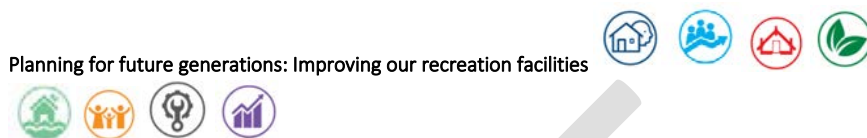
Whakatāne District residents over the age of 80 were encouraged to attend the annual festive over 80's morning tea. The occasion, hosted jointly by Whakatāne District Council and Community Boards, was an opportunity to acknowledge the contribution the older generation had made to our communities. The morning tea was held in the Reception Lounge at the Whakatāne War Memorial Hall early December, where guests were served hot beverages and food by the Mayor Dr Victor Luca, Councillors, and Community Board representatives, whilst enjoying entertainment provided by local pre-schoolers. The event, now in its twenty-third year, is much – anticipated by elected members and those in the wider community. Talent guests from the Floral Arts society lent their artistic flair to style the venue, which is always a highlight for the keen gardeners attending the popular event,

Whakatāne Aquatic and Fitness Centre Maintenance

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

The Whakatāne Aquatic and Fitness Centre closed for three weeks in April 2024 which allowed contractors to carry out scheduled maintenance and improvement works. Both the pools and gym closed, which meant contractors could undertake improvement and maintenance works on the changing room and toilet facilities, hot water system, and the 25 – metre indoor pool. Whilst the closure was not ideal, maintenance investment was necessary for the facility to continue to operate safely and efficiently.

Planning for future generations: Improving our recreation facilities



Improvements to the wider Rex Morpeth Recreation Hub were included in the Long Term Plan 2021-2031 budget, with the Rex Morpeth Recreation Hub Master Plan project getting underway in late 2022. Initial key users and wider community engagement, analysis of the engagement and development, testing and refinement of several master plan options were undertaken throughout 2023. Through this process three draft master plan options were developed and discussed with key users at a workshop in August 2023. Master plan options, including the enhanced status quo, were further refined, and community wide engagement on these options was carried out over a four-week period during September - October 2023. Over 300 submissions were received, with a majority of respondents identifying that some or all of the park's facilities needed upgrading. Submitters included local clubs and organisations.

A final consultant recommended master plan was presented to the Living Together Committee in December 2023 and this plan was included in the community consultation in April 2024 for the Long Term Plan 2024 – 2034. The master plan proposes a redevelopment of the Hub with any upgrades delivered in stages over 10 years to allow time to carry out detailed design and planning, seek feedback, obtain external funding and carry out construction works. This includes:

- A multi-purpose facility with significant upgrades to Whakatāne War Memorial Hall, including the Little Theatre
- A sports pavilion to replace the existing Rugby Park grandstand
- An accessibility-friendly playground
- Increased carparking space
- Other required improvements over the Rex Morpeth Recreation Hub area.

Through the long term plan 2024-2034 consultation a significant number of submitters indicated their preference was to carry out necessary upgrade or a complete 'do nothing' option as their preferred

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

option. The main reasons for this focused on the projected rates rises, the current economic climate and the need for other core infrastructure projects to be prioritised.

It was concluded that closing the door now on planning for the future of the Rex Morpeth Recreation Hub will only defer the problem and the cost to future generations of ratepayers. It was recommended to continue to plan for the staged investment in the Rex Morpeth Recreation Hub, a key community asset for the Eastern Bay of Plenty. Council cannot and should not do it alone, it must partner to plan, fund and deliver the improvements for the success of the project and for future generations.

Whakatāne Holiday Park

The Whakatāne Holiday Park has seen a steady year-on-year increase in revenue and guest nights over the past 3 years. A financial milestone of reaching \$1million in net revenue was achieved before end of the year. Although we did not meet our performance target for the number of total guest nights at the Whakatāne Holiday Park this year, guest nights were up 1.4% from the previous year. Meeting our guest night target is challenging due to a post-COVID reduction in the international tourist market coupled with the changing behaviours of guests, with less people camping in tents. However, we are seeing an increase the demand for our cabins and we are focusing on the financial return rather than the number of guest nights. We have continued to invest in upgrading the facilities and have received positive feedback from guests. Attracting more guests to the holiday park has remained a focus through-out the year. Efforts contributing to this include a marketing rebrand which is ready to be launched later in 2024.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | MOE | TARGET 2023/24 | COMMENT |
|---|--------------------------|--------|-----|----------------|--|
| User satisfaction with recreation facilities in the Whakatāne District (sports fields, parks and reserves, playgrounds, boat ramps and wharf facilities) | 76% | 78% | | 77% | There is no significant trend over time. There was a dip in satisfaction levels for both Boat Ramps and Wharf facilities and Playgrounds. |
| User satisfaction with public swimming pools in the Whakatāne District | 77% + 6% margin of error | 81% | | 75% | 1-in-3 residents (32%) reported visiting a swimming pool in the District in 2024 (up from 26% in 2023 and 25% in 2022). Satisfaction among swimming pool users (77%) in 2024 remained high and similar to 2023 (81%) – and 10%-points above the national benchmark. In 2024, satisfaction was lower among 18-39 year olds; but higher for males than for females (7.3 vs 6.5 on average). |
| User satisfaction with community facilities in the Whakatāne District (public toilets, public halls, cemeteries, crematorium facilities) | 68% | 79% | | 74% | Note: Index results are average scores of other calculated measures. Unlike other measures in this report, index results are not directly collected from the population and do not have margin of errors. |
| User satisfaction with art and culture services in the Whakatāne District (Te Whāre Taonga o Taketake - Whakatāne Museum and Research Centre, District Libraries, Te Kōputu a te Whanaga a Toi - Whakatāne Library and Exhibition Centre) | 81% | 84% | | 77% | |
| Total guest nights in the Whakatāne Holiday Park | 25,472 | 25,115 | | Above 29,000 | We did not meet target due to the ongoing impact from the decreased international tourist market and the and changes in guest behaviour (length of stay is shorter in duration, and there is an increasing demand for cabins rather than camping). When the target was set, the park had permanent residents, this is no longer the case with only temporary visitors staying at the park. |

What these activities cost and how they were paid for

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

COMMUNITY SAFETY

Te marutau o te hapori

Outcomes:

- Strong, connected, interdependent, diverse communities
- Integrating nature into our decision-making

? Capital Expenditure

? Operating Expenditure

11/12 performance measures met

This group of activities delivers a range of functions that contribute towards the Whakatāne District being a place where people feel safe and are protected from a range of risks to their health and wellbeing. We aim to make sure that buildings and public places are safe for people that use them, and that legal standards are met. We also have a crucial role to play in civil defence emergencies, as our district has faced a number of natural hazard events in recent history.

Activities in this group

- Health and safety
- Resource management – consents
- Building control
- Road safety
- Emergency management

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What happened this year?

Education Campaigns and Events

In order to increase safety awareness within our district we hosted a range of events to share knowledge, provide advice, and engage our community in our safety initiatives and activities. These events included.

September Motorcycle Awareness Month



Motorcycle riders account for one third of fatalities, and are 21 times more likely to be killed or injured on our roads than other road users, travelling the same distance.

To raise awareness, the Eastern Bay Road Safety Programme team organised an action-packed event Saturday 9th September, during the September Motorcycle Awareness Month, with 200 in attendance . The 'Revved Up' event was for riders to enjoy a free sausage sizzle and coffee whilst brushing up on their motorcycle skills and knowledge.

There were some fantastic prizes up for grabs from our three local motorcycle businesses: Underwood and Wilkins, Tony Rees Motorcycles and Whakatane Motorcycles. There were also live demonstrations and a skills race led by PassMasters, a certified rider training provider. All those attending had the opportunity to sign up for a free 'Ride Forever programme, an initiative supported by ACC.

Amazing Race



A whopping 80 teams took part in the Amazing Safety Race, with over 300 participants from throughout the Eastern Bay, including Ōpōtiki, Ruatoki and Waimāna.

During the race the Eastern Bay Road Safety Programme team shared the importance of; wearing seatbelts, not texting and driving, knowing the road rules, sharing safety messages to others, being prepared in an emergency, reducing our carbon footprints, healthy body = health mind, and how alcohol affects our mobility.

Special thanks to all the local organisations and businesses that supported the kaupapa with and alongside us; Radio 1XX, SunFM1065, New Zealand Police, EPIC Whakatane Town Centre, Whakatane District Council, Bay of Plenty Civil Defence, Tuhoē Hauora and Bike Whakatane.

It was a fun-filled day and was great to see our community engaged in an interactive way.

Biketober



Biketober launched with a host of exciting events, including;

Draft Annual Report / Finance and Performance Thursday, 29 August 2024

Page 62 of 82

Finance and Performance Committee - AGENDA

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

- Murupara Community Wheels Day
- Giving E-Biking a go
- Women's Basic bike maintenance course
- Family bike skills, games and BBQ
- Ride the Runway and tour of the Whakatāne flying school down at the Whakatane Airport
- Give mountain biking a go at the Ōnepū Mounting Biking Park
- Wheels day – prizes and rewards for all kids that brought their wheels to school
- Go by Bike Day – biking to Robert Harris and receiving a free coffee
- European tour highlights
- The Chase mountain biking race series
- Burma Road Night Ride
- TrioBike ride in Ōhōpe
- Whakatane Cycle Tour
- Ōhōpe Mystery Cycle Tour
- Unlock a Coffee by learning how to use the LockyDock Stations

These fun and educational cycling related events were received positively by the community, with the launch day seeing us fitting safety bells, some roller-skating appearing in Murupara, a 'wheely' good turn out with 621 Tamariki from local Kura taking part in our Wheels Day, and free Car Seat Clinics as part of the fun. These initiatives provided an opportunity to showcase a multitude of alternative transport modes in a fun and safe way.

New e-bike Library

In addition, an e-bike library has been funded by the Climate Emergency Response Fund. This allows residents to trial different types of e-bikes for a small fee. Launched in August 2023, the library includes a range of town bikes, cargo bikes, and mountain bikes, and allows people to try an e-bike before purchasing one of their own.

Launched in August 2023, the Whakatāne E-bike Library, an initiative funded by Waka Kotahi, gives people the opportunity to borrow an electric bike (e-bike) for 21 days. All that's needed is a bit of paperwork and a \$100 koha to Cycling Without Age EBOP, the community partner operating the programme. Anyone who takes part in the scheme will also receive a \$100 voucher from Whakatāne Cycle Centre or Full Cycle Bokes toward the purchase of an e-bike.

The e-bike library launched initially with 7 bikes but has since grown to 10 with support from Trust Horizon. Bike options include; cargo bikes, which are ideal for carrying children and bulky gear, a trike for those with mobility balance needs, and even one that can be used on and off-road.

The launch of the E-Bike Library aligns with the Council's Active Whakatane Strategy which aims to create a more comprehensive and connected network for anyone riding a bike. The official launch took place on Thursday, 10 August at the Whakatāne E-Bike Library depot in Henderson Street, Whakatāne.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

The project is funded by the Transport Choices package, which was part of the Waka Kotahi Climate Emergency Response Fund (CERF) programme. The programme aims to demonstrate what’s possible for communities nationwide by quickly providing people with healthier, more affordable, and safer transport choices that are good for us, and for the environment.



Advertising Screens for Locky Docks

In partnership with Trust Horizon, Whakatāne District Council was excited to announce the addition of advertising screens to some of the districts Locky Dock Stations.

Locky Docks are free and secure parking/charging stations for both bikes and e-bikes. Team Leader Transport Strategy & Assets Joe Metcalfe says the stations have been a game changer in promoting sustainable transport across the Whakatane District.

The recent installation of digital screens adjacent to some stations offer a new outdoor platform for community messages, including spreading positivity and increasing awareness, whilst providing an opportunity for local businesses to advertise.

These digital screens have been installed outside Robert Harris, Caroline Eve on The Strand and at Mahy Reserve at Ohope Beach. The Locky Docks and digital screens have been made possible thanks to Trust Horizon, Waka Kotahi New Zealand Transport Agency and Whakatane District Council.



Emergency Management

We are advancing our Emergency Management Preparedness so that the district is prepared for and can effectively respond to an emergency.



Tsunami

Tsunami Preparedness initiatives include readiness information for the public in the form of booklets and social media releases. These online and hard copy booklets provide information and maps relevant to the District Tsunami zones. We have also completed the upgrades of coastal tsunami information boards, with a list of potential future locations.



Earthquakes

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Earthquake reduction and readiness works such as seismic strengthening as well as minor upgrades to the Te Teko War Memorial and Waimana-Nukuhou North Memorial Hall completed in October 2023. Seismic strengthening is part of several measures being taken to build greater community across the District. Building upgrades were carried out to ensure the building is structurally sound, and will better equip the Halls for community readiness and response efforts in the case of an emergency.

**Resources**

We are in the process of expanding our emergency resource and supplies, which will be stored in outlying communities throughout the district, and associated with community emergency response teams. Additional emergency supplies will be stored at elevated locations in highly populated areas. Council has begun liaising with community stakeholders and local iwi leaders in outlying communities to identify optimal locations for Emergency Evacuation Centres and determine essential equipment requirements, such a welfare kits and connectivity neds, should these communities be cut off from main centres.

Other district – wide emergency equipment, welfare kits, increased radio and digital connectivity, and an alternative Emergency Operations Centre form part of the Better Off Funding packing within this project.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | MoE | TARGET 2023/24 | Comment |
|--|--------|--------|-----|----------------|---|
| Percentage of licenced premises inspected at least once per year, excluding special licences | 100% | 88% | | 100% | A fully staffed team for the 2023/24 ensured we met our target. |
| Percentage of complaints relating to abandoned cars, litter, and general bylaw offences responded to within two working days | 92.71% | 96.4% | | 90% | No significant change to last year |
| Percentage of after-hours excessive noise complaints responded to promptly* | 95% | 98% | | 90% | **'Promptly' is defined as responding to excessive noise complaints within the following timeframes: Area 1 (Ōhope, Whakatāne, Tāneatua, Coastlands, Awakeri, Thornton Road to Golf Links Road): less than 60 minutes Area 2 (Edgecumbe, Matatā, Otamarakau, Otakiri, Onepū, Te Teko, Te Mahoe and Wainui to the Ōpōtiki intersection): less than 100 minutes Area 3: (Murupara, Galatea, and environs): less than 120 minutes. No significant change to last year |
| Percentage of environmental health complaints (excluding noise) to within two working days | 86% | 93% | | 90% | A staff shortage through-out the year, meaning we were unable to meet the target. There is a nationwide talent shortage of environmental health officers, impacting our ability to hit this target. |
| Percentage of aggressive/threatening dogs and | 90.41% | 89.70% | | 90% | This is core function of Council, to deliver public safety. The |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

| | | | | | |
|---|---|------------------------------------|--|--------------------------------------|--|
| roaming stock complaints responded to within one hour | | | | | target was met for the year, no significant change to the year prior. |
| Percentage of all other animal control complaints responded to within two working days | 97.24% | 98.9% | | 90% | |
| User satisfaction with Council's resource consent process | 66.50% | 65% | | 60% | Results are from 20 returns received from a total of 174 granted consents (i.e., 11.5% return rate). The returns tend to be extreme, i.e., 4 were 2/10 or less and 11 were 8/10 or more, giving a median of 85%) |
| User satisfaction with Council's building consent process | 69.69% | 69% | | 60% | No significant change |
| The change from the previous year in the number of fatalities and serious injury crashes on the local road network, expressed as a number (M) | 23 Crashes (4 Fatal and 19 Serious) 2 less than the previous year | 25 (2 more than the previous year) | | Fewer crashes than the previous year | There was a slight improvement on the previous year with an overall reduction of 2 crashes. Motorcycle riders were over represented at 43% of crashes |
| The district is prepared for and can effectively respond to an emergency | Advancing | Advancing | | Advancing | We are actively advancing our emergency response and preparedness through initiatives in the form of resources through information and awareness for our community. |
| Percentage of residents that have an understanding of what consequences would be if a disaster struck their area | Results are provided every second year | 87.5% | Results are provided every second year | 80% | Note: Results are provided every second year |
| Percentage of residents that have taken any action to prepare for an emergency | Results are provided every second year | 87.5% | Results are provided every second year | 80% | Note: Results are provided every second year |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

CORPORATE SERVICES

Ngā ratonga rangatōpū

Outcomes:

- Strong, connected, interdependent, diverse communities

This group of activities delivers a range of functions and services that support all activities of Council. These are often referred to as our 'internal activities' and includes functions such as financial services, information management, human resources and technology and systems.

Activities:

- Corporate and District activities

? Capital Expenditure

? Operating Expenditure

3/4 performance measures met

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

What happened this year?

Whakatāne Airport



The Whakatāne Airport is a valued community asset, connecting Whakatāne and the wider Eastern Bay of Plenty to the rest of the country. It plays a vital role in our economic infrastructure, supporting trade, tourism, and overall economic growth for the Eastern Bay of Plenty. The airport has historical ties to Ngāti Taiwhakaea and Ngāti Awa, with opportunities to develop partnerships. Continuous investment and upgrades are needed to maintain and enhance this critical infrastructure.

Overall airport activity has stabilised this financial year, which indicates the Whakatāne Airport can expect a modest increase in air traffic over the coming years. As a Joint Venture airport with the Ministry of Transport the Whakatāne Airport has a renewed focus on improving its financial performance while continuing to enhance safety. Many initiatives have been identified through the process of developing the Whakatāne Airports Master Plan and Strategic Plan 2024 -2029.

The aim is to further develop a fantastic asset for our community while reducing the liability this asset has historically had on rate payers. One of the major steps forward the Whakatāne Airport has made is the introduction of a new landing fees structure. This was a robust process which culminated in the new structure being approved for introduction on the 1st of July 2024 by the Minister of Transport. As the Whakatāne Airport and community works through the implantation of the Strategic Plan 2024 – 2029, the strategic planning outlined paves the way for a promising future for the Whakatāne Airport.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

How we performed

Tā mātau mahi

Local Government Funding Agency (LGFA)

The Local Government Funding Agency allows Councils to borrow funds at lower interest margins than would be otherwise possible. In the past year this has provided Council with access to a broader range of borrowing options, so less ratepayer funds are spent on interest repayments. Find out more about the LGFA in our Long-Term Plan or on the LGFA website.

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | MoE | TARGET 2023/24 | Comment |
|--|----------|----------|-----|----------------|---------|
| Estimated annual savings for the Council is between 5 bps and 10 bps (weighted average) below trading bank margins for term loans. | *pending | Achieved | | To be achieved | |

Bay of Plenty Local Authority Shared Services

Bay of Plenty Local Authority Shared Services Limited investigates, develops, and delivers shared services, joint procurement, and communications for the participating Councils. In the past year the Council has continued to benefit from substantial cost savings as a result of participating in this CCO. Key areas where savings were achieved included the costs of insurance, postal services, software, and aerial photography. During the last year significant benefits have been achieved through inter-regional collaboration with BOPLASS leading a number of procurement projects across large collectives of Councils.

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | TARGET 2023/24 | Comment |
|---|----------|----------|--|---------|
| Total estimated savings to the Council for each financial year | Achieved | Achieved | Initiatives provide financial savings of greater than 5 percent and/or improved service levels to the Whakatāne District Council | |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

| PERFORMANCE MEASURES (How we will measure our service delivery) | 2024 | 2023 | TARGET 2023/24 | Comment |
|---|----------|----------|----------------|---------|
| The Airport is maintained to Civil Aviation Authority (CAA) requirements | Achieved | Achieved | To be achieved | |
| Minimum of two executive management meetings per year with our Airport Operator and Airline | Achieved | Achieved | 2 | |

What these activities cost and how they were paid for

Te utu o ēnei ngohe, ā, i pēhea i whakaea

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

EXPANDING OUR REACH: FUNDING, CLIMATE ACTION, AND ACHIEVEMENTS

This section of the annual report groups covers other initiatives Council has been involved in throughout the year such as the securing of external funding, commitment to climate change, and achievements through awards.

Better off Funding Projects

The Whakatāne District is set to benefit from community projects funded by the Department of Internal Affairs Better Off Funding package throughout 2024. The Council was successful in receiving the first tranche (\$5.66 million) from the Department of Internal Affairs Better Off Funding package in December 2022, to be used toward projects designed to boost local amenities and outcomes for residents. Progress updates for each of the seven projects are as follows:

Eastern Bay of Plenty Spatial Plan (\$200K)



Better Off Funding has successfully assisted in accelerating progress with investigative work associated with the Eastern Bay of Plenty Spatial Plan (EBOP) Project. Funding toward this portion of the EBOP Spatial Plan is now be completed. The funding has assisted with:

The launch of the 'Our Places – Eastern Bay Spatial Plan' website, providing information and resources about the project and its outcomes.

Developing and finalising key maps that show the current and future growth scenarios for the region based on various factors and assumptions.

Refreshing the project plan to reflect the changes and progress made throughout the project.

Conducting workshops, briefings, and meetings with the Control Group, Technical Group, and Governance Group, which consisted of representatives from various stakeholders and agencies involved in the project.

CCTV Upgrade and Expansion (\$1M)



The delivery and installation of 33 new safety cameras, also known as CCTV, across the Whakatāne District, alongside the upgrade of 11 existing cameras has been delivered and a monitoring contractor appointed and in place.

Finance and Performance Committee - AGENDA

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

All work has been completed for the scope of the project as originally agreed and delivered on time and under budget. The underspent budget will be used to deliver additional cameras and software upgrades along with additional radio functionality.

The project team are now working alongside the monitoring contractor and NZ Police ICT team to address minor teething issues with the connectivity of radios.

Natural Hazard Resilience (\$1.36M)

This project aims to improve the Civil Defence readiness and community resilience of the Whakatāne District in case of natural disasters. The project has seen the completion of seismic strengthening to the Waimana-Nukuhou North Memorial Hall in October 2023, with work on the Te Teko War Memorial Hall progressing well and ahead of schedule with a targeted completion date of May 2024.

Work on upgrading an alternative Emergency Operations Centre on higher ground is complete. The project is developing Community Emergency Hubs across the Whakatāne District, which will provide emergency resources to support the community following a natural hazard emergency or other event.

Engagement with local marae and other community organisations to build awareness and gain support for the hubs continues to be positive.

He Waka Hono Hapori Community Connections and Outreach (\$500K)

Two vans have been ordered to deliver Council services and information to rural and isolated communities. The vans will act as multipurpose outreach hubs of engagement and provide information and some Council services to those unable to make the trip to physical Council buildings.

The vans are anticipated to arrive by May 2024, and the project team is currently planning for the graphic design and special internal fit-out of the vans.

The service will be known as Hono Hapori Community Connections, and it is anticipated the vans will be ready to service the communities by June 2024.

Edgecumbe to Thornton Shared Pathway (\$900K)

The first stage of the shared pathway is expected to begin in May. The first stage involves resurfacing an existing grass walking track beginning at Edgecumbe Squash and Tennis Club on College Road and ending at Edgecumbe Skatepark.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

The shared pathway is part of the broader vision of walking and cycling loops intended for the Whakatāne District. It forms part of the 'Active Whakatāne' strategy which aims to develop rural community projects and improve the connections between outlying communities.

Options for the remaining stages are still being researched and include options for riverbank trails or roadside trails. This has seen the project completion date pushed out to December 2025.

The finalised route of the remaining pathway to Thornton is still to be confirmed and staff are working with some property owners on concerns they have.

Collective Iwi Policy Hub (\$1M)

This project aims to equitably resource iwi to participate and engage in a range of strategy, policy and legislative proposals that affect the Whakatāne District.

The project is on track, with a Program Manager appointed in December 2023, who has initiated engagement with the 4 iwi CEO's. The Hub is developing terms of engagement, resourcing needs, support staff recruitment and forward support plans.

The next priority is to ensure perspectives and priorities are included in the EBOP Spatial Plan and Climate Change projects, with planning in progress to define the scope of these projects. The goal is to start this work by March 2024. The second half of 2024 is expected to see the start of new work and resources for the Hub.

Southern District Towns Regeneration (\$700K)

This project supports the strategic visions of Ngāti Manawa and Ngāti Whare, which aim to revitalise Murupara and Minginui. This involves developing masterplans that align with the aspirations of these iwi and communities.

The Minginui Community will be invited to begin Vision and Master Planning with the help of external consultants. The activation project for Minginui will follow after this work is done. The project has been slightly delayed due to consultant availability. The new completion date is June 2025

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Our commitment to addressing climate change

Although we did not set any specific targets for climate change through our Long Term Plan 2021. We are part of the Toitū reduce carbon programme and also report six monthly on our action plans from 2021 – 2024 climate strategy.

During the 2023/24 financial year, the Council's carbon footprint amounted to 3,166 tonnes of carbon dioxide equivalent (tCO₂e), reflecting a 9% reduction from the 2022/23 financial year in which emissions were recorded as 3,402 tCO₂e. A summary of our top five carbon emission sources are shown below.

| Emission Source | Carbon emitted | Percentage of Emissions | Comment |
|----------------------------|--------------------------|-------------------------|---|
| Wastewater Treatment Plant | 2,028 tCO ₂ e | 64% | Our Wastewater Treatment Plant accounted for 2,028 tCO ₂ e (64%). This was a 9% decrease compared with 2022/23 year. |
| Electricity | 345 tCO ₂ e | 11% | Our electricity consumption has decreased over the last year. Council continues its energy management plan with the support of EMSOL. |
| Diesel | 253 tCO ₂ e | 8% | Council's diesel usage has reduced by 35% compared with the 2022/23 financial year. |
| Waste | 195 tCO ₂ e. | 6% | Waste emissions are now being recorded by the Council. It made up 195 tCO ₂ e. Having greater visibility of our waste emissions helps us to work towards reducing these over time. |
| Refrigerant Leaks | 176 tCO ₂ e | 6% | Some large-scale refrigerant leaks occurred in the year across three different gas types, HFC134a, R410A, R407C totaling 176 tCO ₂ e. Reduction work has been occurring to prevent further leaks. This includes anti-vibration work to units, leak monitoring, and policy changes to procurement for the replacement of units to use more environmentally friendly refrigerants. |

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Reducing our energy use

Our Energy Management Programme has delivered continuous reductions and cost savings since it started in 2019. This program aims to identify, implement, and monitor opportunities for energy savings and emission reductions and was established in collaboration with the Energy Efficiency and Conservation Authority (EECA) and the support of Energy Management Solutions (EMSOL). In the 2023/24 financial year, our Energy Management Program has achieved significant cost savings and a substantial reduction in carbon emissions. Our Energy Management Programme has continued to show results, with continuing changes to reduce power usage across Council sites. We have successfully saved approximately \$94,142 and reduced carbon emissions by 600 tCo2e through the implementation of energy-efficient practices and retrofitting initiatives with the help of our consultants and are looking at further concepts to help reduce these numbers further.

We have continued to see energy savings through energy reduction actions such as turning off swimming pool boilers over summer months, switching to LED lighting, and optimising heating, ventilation, and air conditioning systems. Our Three Waters team has also incorporated energy efficient measures into infrastructure including more energy efficient high lift pumps.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

Celebrating our awards

Me Whakanui ka tika

He aha te mea nui tea o? He tangata, he tangata, he tangata!

What is the most important thing in the world? It is people, it is people, it is people!

Each year Taituarā holds a series of awards to showcase and celebrate the outstanding people and mahi that contribute to the success of the local government sector. Whakatāne District Council is proud to be a leader in fostering a positive and productive work environment for its staff, ultimately benefiting the entire Whakatāne community. Council has received national recognition of this at the annual Taituarā Local Government Excellence Awards in June 2024, being announced as the winners in two different categories.

Excellence in Organisation and People Development Award

For the second year in a row, Council was announced as the recipient of the Excellence in Organisation and People Development Award for its innovative 'Reimagining Work' programme. This category recognises approaches that build an exceptional organisational culture or capability through the application of transformational leadership. A crucial aspect contributing to the success of these awards is the potential for other councils to easily replicate the winning project in their pursuit of similar improvements

Reimagining Work began as a building refurbishment in response to required earthquake strengthening that has carried through to a fully hybrid working environment and its translation into a better overall work/life balance and an enhanced ability to meet the needs of the local community. The initiative was recognised by the judges as going beyond flexible working policies to become a highly transferable and measurable workplace transformation project encompassing systems, values, and leadership. The Reimagining Work programme emphasises that building successful local government isn't about bricks and mortar, it's about people.

Winners of Management Challenge, New Zealand

Ngā Toa Mahi Tahi, a team of six Whakatāne District Council staff, were announced as the winners of the New Zealand leg of the Australasian Management Challenge at the Taituara awards. In May 2024, Ngā Toa Mahi Tahi participated in the New Zealand leg of the Management Challenge— an inter-council challenge sponsored by Marsh that is designed to sharpen the leadership and management skills of local government staff. The Challenge organisers highlighted the team's collaborative spirit, respectful communication, and strong performance across a number of tasks. Ngā Toa Mahi Tahi will represent New Zealand against the top regional teams from across Australia in August 2024.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)**Most Beautiful Large Town, New Zealand**

Whakatāne was crowned New Zealand's most beautiful large town at the annual Keep New Zealand Beautiful Award, in November 2023. The beautiful awards are New Zealand's longest-running sustainability awards and provide a benchmark for environmental excellence. Run annually since 1972, the awards inspire, recognise and acknowledge those individuals, schools, community groups, towns and cities working passionately to keep New Zealand beautiful.

Those judging the award paid homage to the 'dedication and passion' of the Whakatāne people, and the districts committed focus to Iwi engagement and community led projects.

The Keep New Zealand Beautiful Awards judges were impressed with the sheer amount of work going on in the environment space; including, a new tree strategy aiming to increase canopy cover by 20 percent over the next 20 years, a new wetland 'sponge park' to help local streams recover from weed infestations, and a plan to rejuvenate nearby wetlands and restore the health of the Awatapu lagoon.

7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

NOTES TO THE FINANCIAL STATEMENTS

Ngā kōrero e tāpiri ake ki ngā whakapuakanga pūtea

*Placeholder

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

STATEMENT OF COMPLIANCE

Te Whakapuakanga Whakaū ki ngā Ture

*Placeholder

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7.4.1 Appendix 1 - Draft Annual Report 2023/24(Cont.)

AUDIT REPORT

*Placeholder

DRAFT

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

APPENDIX 2: GROUPS OF ACTIVITIES
INDICATIVE FINANCIAL REPORTS FOR THE YEAR TO 30 JUNE 2024

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

LEADERSHIP AND COMMUNITY
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| Sources of operating funding | | | |
| General rates, uniform annual general charges, rates penalties | 3,230 | 3,175 | 3,071 |
| Targeted Rates | 376 | 383 | 380 |
| Subsidies and grants for operating purposes | - | - | 179 |
| Fees and Charges | 23 | 3 | (1) |
| Internal charges and overheads recovered | 1,484 | 1,550 | 1,411 |
| Local authorities fuel tax, fines, infringement fees, and other | - | - | 99 |
| Sources of operating funding (A) | 5,113 | 5,111 | 5,138 |
| Applications of operating funding | | | |
| Payments to staff and suppliers | 3,655 | 3,698 | 4,153 |
| Finance costs | 2 | 1 | 3 |
| Internal charges & overheads applied | 1,449 | 1,404 | 1,675 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 5,105 | 5,104 | 5,830 |
| Surplus (deficit) of operating funding (A-B) | 8 | 8 | (692) |
| CAPITAL | | | |
| Sources of capital funding | | | |
| Subsidies and grants for capital expenditure | - | - | - |
| Development and financial contributions | - | - | - |
| Increase (decrease) in debt | (6) | (6) | (6) |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | (6) | (6) | (6) |
| Applications of capital funding | | | |
| Capital expenditure | | | |
| - to meet additional demand | - | - | - |
| - to improve level of service | - | - | - |
| - to replace existing assets | - | - | - |
| Increase (decrease) in reserves | 2 | 2 | (698) |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 2 | 2 | (698) |
| Surplus (deficit) of capital funding (C-D) | (8) | (8) | 692 |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

STRATEGY AND FUTURES
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| <i>Sources of operating funding</i> | | | |
| General rates, uniform annual general charges, rates penalties | 5,065 | 5,202 | 5,031 |
| Targeted Rates | 991 | 1,065 | 1,042 |
| Subsidies and grants for operating purposes | 887 | 21 | 892 |
| Fees and Charges | 46 | 47 | 50 |
| Internal charges and overheads recovered | 260 | 266 | 222 |
| Local authorities fuel tax, fines, infringement fees, and other | 2,414 | 2,462 | 2,886 |
| Sources of operating funding (A) | 9,664 | 9,062 | 10,123 |
| <i>Applications of operating funding</i> | | | |
| Payments to staff and suppliers | 6,227 | 4,866 | 6,480 |
| Finance costs | 248 | 245 | 426 |
| Internal charges & overheads applied | 2,198 | 2,077 | 2,511 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 8,673 | 7,188 | 9,417 |
| Surplus (deficit) of operating funding (A-B) | 991 | 1,874 | 706 |
| CAPITAL | | | |
| <i>Sources of capital funding</i> | | | |
| Subsidies and grants for capital expenditure | - | - | - |
| Development and financial contributions | - | - | - |
| Increase (decrease) in debt | 410 | (138) | 583 |
| Gross proceeds from sale of assets | 2,225 | 1,894 | 223 |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | 2,635 | 1,756 | 806 |
| <i>Applications of capital funding</i> | | | |
| Capital expenditure | | | |
| - to meet additional demand | 67 | 34 | - |
| - to improve level of service | - | 156 | 702 |
| - to replace existing assets | 42 | 53 | 78 |
| Increase (decrease) in reserves | 3,516 | 3,387 | 731 |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 3,626 | 3,630 | 1,512 |
| Surplus (deficit) of capital funding (C-D) | (991) | (1,874) | (706) |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

Finance and Performance Committee - AGENDA

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

STRATEGY AND FUTURES
SCHEDULE OF MAJOR PROJECTS
30 JUNE 2024

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|--|---|----------------|----------------|----------------|
| 60 Bunyan Rd Woodwaste Remediation | | - | 177,886 | - |
| Airport Land Redevelopment | | 156,060 | 161,610 | - |
| Esplanade Canopy Roof | Balance carried forward to 2025 | - | 183,340 | - |
| Purchase 144 The Strand | Property Purchase | - | - | 446,822 |
| Intergration Floodwall & Building | Underway, balance carried forward to 2025 | - | 1,600,000 | 300,139 |
| Strategy & Futures Renewals Consolidated | | 86,708 | 89,792 | 33,436 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

TRANSPORT CONNECTIONS
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| Sources of operating funding | | | |
| General rates, uniform annual general charges, rates penalties | (31) | (32) | (31) |
| Targeted Rates | 6,492 | 6,695 | 6,656 |
| Subsidies and grants for operating purposes | 5,098 | 5,184 | 7,187 |
| Fees and Charges | 132 | 141 | 195 |
| Internal charges and overheads recovered | 2,152 | 2,217 | 2,275 |
| Local authorities fuel tax, fines, infringement fees, and other | 285 | 297 | 351 |
| Sources of operating funding (A) | 14,128 | 14,502 | 16,633 |
| Applications of operating funding | | | |
| Payments to staff and suppliers | 7,321 | 7,423 | 9,715 |
| Finance costs | 434 | 478 | 887 |
| Internal charges & overheads applied | 3,404 | 3,263 | 3,691 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 11,158 | 11,163 | 14,292 |
| Surplus (deficit) of operating funding (A-B) | 2,970 | 3,339 | 2,340 |
| CAPITAL | | | |
| Sources of capital funding | | | |
| Subsidies and grants for capital expenditure | 9,002 | 7,547 | 17,083 |
| Development and financial contributions | 93 | 96 | 27 |
| Increase (decrease) in debt | 3,008 | 1,239 | 3,980 |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | 12,103 | 8,882 | 21,090 |
| Applications of capital funding | | | |
| Capital expenditure | | | |
| - to meet additional demand | 4,068 | 1,870 | 195 |
| - to improve level of service | 4,875 | 3,986 | 14,306 |
| - to replace existing assets | 5,757 | 5,967 | 10,117 |
| Increase (decrease) in reserves | 373 | 397 | (1,189) |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 15,073 | 12,221 | 23,430 |
| Surplus (deficit) of capital funding (C-D) | (2,970) | (3,339) | (2,340) |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

Finance and Performance Committee - AGENDA

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

TRANSPORT CONNECTIONS
 SCHEDULE OF MAJOR PROJECTS
 30 JUNE 20204

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|---|--|----------------|----------------|----------------|
| LR341 LC/LR Active Whakatāne/Road to Zero | | 3,276,054 | 6,703,836 | 7,221,356 |
| Storm Damage | | - | 630,284 | 1,422,870 |
| TCP-SH30 Shaw Rd to Bridge SUP | Project cancelled following change of Government | - | 2,599,779 | - |
| TCP-Whk Riv Awatapu-Cutler SUP | Project cancelled following change of Government | - | 599,949 | - |
| LR214 Pavement Rehabilitation | | 989,719 | 1,285,284 | 1,611,002 |
| LOC215 Footpath Renewal | | 361,056 | 800,000 | 651,831 |
| Keapa Road Improvements | Project delayed, rebudgeted in yr 1 & 2 of LTP | 392,914 | 4,023,257 | 3,332 |
| SPR341 LC/LR Improvements Structures | | 1,051,311 | 4,499,358 | 2,365,770 |
| NFA Seal Extensions | | 796,448 | 1,111,917 | 1,087,900 |
| BOF-Edgecumbe to Thornton Cycle Trail | Better Off Funded Project, rebudgeted LTP 2025 | - | 898,110 | 98,007 |
| Other Projects/Renewals Consolidated | | 4,956,027 | 10,313,215 | 10,156,667 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

WATER SUPPLY
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| <i>Sources of operating funding</i> | | | |
| General rates, uniform annual general charges, rates penalties | - | - | - |
| Targeted Rates | 7,549 | 8,261 | 8,362 |
| Subsidies and grants for operating purposes | - | - | - |
| Fees and Charges | 1,131 | 1,160 | 133 |
| Internal charges and overheads recovered | 254 | 259 | 126 |
| Local authorities fuel tax, fines, infringement fees, and other | - | - | 2 |
| Sources of operating funding (A) | 8,933 | 9,680 | 8,623 |
| <i>Applications of operating funding</i> | | | |
| Payments to staff and suppliers | 2,390 | 2,476 | 3,064 |
| Finance costs | 584 | 733 | 1,166 |
| Internal charges & overheads applied | 2,824 | 2,748 | 3,271 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 5,798 | 5,957 | 7,501 |
| Surplus (deficit) of operating funding (A-B) | 3,135 | 3,723 | 1,122 |
| CAPITAL | | | |
| <i>Sources of capital funding</i> | | | |
| Subsidies and grants for capital expenditure | - | - | - |
| Development and financial contributions | 74 | 76 | 14 |
| Increase (decrease) in debt | 7,598 | 4,701 | 4,459 |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | 7,672 | 4,777 | 4,473 |
| <i>Applications of capital funding</i> | | | |
| Capital expenditure | | | |
| - to meet additional demand | 699 | 17 | 223 |
| - to improve level of service | 8,168 | 4,669 | 2,274 |
| - to replace existing assets | 1,828 | 3,030 | 3,058 |
| Increase (decrease) in reserves | 112 | 785 | 40 |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 10,807 | 8,500 | 5,595 |
| Surplus (deficit) of capital funding (C-D) | (3,135) | (3,723) | (1,122) |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

Finance and Performance Committee - AGENDA

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)WATER SUPPLY
SCHEDULE OF MAJOR PROJECTS
30 JUNE 2024

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|--------------------------------------|--|----------------|----------------|----------------|
| EQ Water Network Renewals | | 637,146 | 2,522,341 | 1,799,933 |
| WHK W Treatment Plant Upgrade | | 3,929,067 | 200,000 | 311,056 |
| WHK W Backflow Preventors | | 353,971 | 689,520 | 8,137 |
| Keepa Road Water Main | | - | 200,000 | - |
| Whakatāne Sludge Treatment | | 1,061,910 | - | - |
| Murupara Treatment Upgrades | | 477,860 | 2,432,527 | 52,473 |
| Taneatua WTP Access Track | | - | 300,000 | 48,812 |
| Ruatoki Water Treatment | | - | 655,005 | 130,718 |
| Plains W Backflow Preventors | Balance carried forward to 2025 | 637,146 | 1,274,153 | 7,136 |
| Otumahi Water Storage | Project underway, rebudgeted in 2025 LTP | - | 5,483,193 | 586,567 |
| Other Projects/Renewals Consolidated | | 618,032 | 3,084,814 | 2,610,226 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

SEWAGE TREATMENT AND DISPOSAL
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| Sources of operating funding | | | |
| General rates, uniform annual general charges, rates penalties | 442 | 471 | 852 |
| Targeted Rates | 5,306 | 5,457 | 5,403 |
| Subsidies and grants for operating purposes | - | - | - |
| Fees and Charges | 207 | 214 | 378 |
| Internal charges and overheads recovered | 146 | 149 | 51 |
| Local authorities fuel tax, fines, infringement fees, and other | - | - | 24 |
| Sources of operating funding (A) | 6,102 | 6,291 | 6,707 |
| Applications of operating funding | | | |
| Payments to staff and suppliers | 1,234 | 1,270 | 1,426 |
| Finance costs | 341 | 337 | 634 |
| Internal charges & overheads applied | 2,173 | 2,127 | 2,534 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 3,748 | 3,734 | 4,595 |
| Surplus (deficit) of operating funding (A-B) | 2,354 | 2,557 | 2,113 |
| CAPITAL | | | |
| Sources of capital funding | | | |
| Subsidies and grants for capital expenditure | - | 2,347 | - |
| Development and financial contributions | 89 | 92 | 9 |
| Increase (decrease) in debt | 645 | 526 | 2,724 |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | 734 | 2,965 | 2,733 |
| Applications of capital funding | | | |
| Capital expenditure | | | |
| - to meet additional demand | 38 | 14 | 49 |
| - to improve level of service | 1,183 | 3,433 | 1,296 |
| - to replace existing assets | 1,065 | 1,806 | 2,858 |
| Increase (decrease) in reserves | 802 | 267 | 642 |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 3,088 | 5,521 | 4,845 |
| Surplus (deficit) of capital funding (C-D) | (2,354) | (2,557) | (2,113) |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)SEWAGE TREATMENT AND DISPOSAL
SCHEDULE OF MAJOR PROJECTS
30 JUNE 2024

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|---|-----------------|----------------|----------------|----------------|
| EQ Sewer Network Renewals | | 212,382 | 882,401 | 1,414,373 |
| Whakatāne Wastewater Discharge Resource Consent | | 371,669 | 391,370 | 5,233 |
| Upgrade Whakatāne Wastewater Treatment Plant | | 318,573 | 1,157,287 | 480,686 |
| Edgecumbe Wastewater Relining | | 424,764 | 1,042,890 | 775,546 |
| Matata Waste Water Scheme | | 3,114,936 | 3,701,786 | 867,639 |
| Murupara Wastewater Discharge Resource Consents | | 159,287 | 264,849 | 2,591 |
| Other Projects/Renewals Consolidated | | 652,013 | 2,073,950 | 656,975 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

STORMWATER DRAINAGE
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| Sources of operating funding | | | |
| General rates, uniform annual general charges, rates penalties | 322 | 320 | 387 |
| Targeted Rates | 3,959 | 4,213 | 4,151 |
| Subsidies and grants for operating purposes | - | - | - |
| Fees and Charges | - | - | 29 |
| Internal charges and overheads recovered | 2,525 | 2,637 | 3,636 |
| Local authorities fuel tax, fines, infringement fees, and other | - | - | 11 |
| Sources of operating funding (A) | 6,806 | 7,170 | 8,213 |
| Applications of operating funding | | | |
| Payments to staff and suppliers | 3,557 | 3,706 | 4,676 |
| Finance costs | 607 | 627 | 1,066 |
| Internal charges & overheads applied | 1,058 | 1,036 | 1,387 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 5,221 | 5,369 | 7,129 |
| Surplus (deficit) of operating funding (A-B) | 1,585 | 1,800 | 1,084 |
| CAPITAL | | | |
| Sources of capital funding | | | |
| Subsidies and grants for capital expenditure | - | - | - |
| Development and financial contributions | 18 | 18 | 5 |
| Increase (decrease) in debt | (124) | 3,171 | 2,148 |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | (106) | 3,189 | 2,154 |
| Applications of capital funding | | | |
| Capital expenditure | | | |
| - to meet additional demand | 112 | 32 | 74 |
| - to improve level of service | 961 | 4,609 | 1,824 |
| - to replace existing assets | 2,948 | 3,584 | 1,749 |
| Increase (decrease) in reserves | (2,542) | (3,235) | (409) |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 1,479 | 4,989 | 3,237 |
| Surplus (deficit) of capital funding (C-D) | (1,585) | (1,800) | (1,084) |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

STORMWATER DRAINAGE
SCHEDULE OF MAJOR PROJECTS
30 JUNE 2024

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|---|---|----------------|----------------|----------------|
| Whakatane Western Catchment Upgrade/Renewal | | 796,433 | 4,304,899 | 1,686,944 |
| Apanui Linear Park | | 1,486,674 | 1,956,850 | 1,104,513 |
| Awatapu Lagoon Wetland Construction | | 2,123,820 | - | |
| WHK SW - Pipe Upgrades | Project underway, balance carried forward to 2025 | 796,433 | 881,744 | 232,731 |
| WHK SW Pump Replacements | Project underway, rebudgeted in 2025 LTP | 2,654,775 | 2,795,500 | 47,371 |
| WHK SW 6 Comprehensive Res con | | - | - | 164 |
| WHK SW - Spence Lane Entrance | | - | - | 98,365 |
| OHOPE SW - Maraetotara Stream | | - | - | 6,206 |
| OHOPE SW Upgrades | | 106,191 | 311,978 | 174,124 |
| Ohope SW Risk assess & implem | | - | - | 0 |
| Ohp Compre SW Consents & Upgrd | | - | 82,320 | - |
| Ohp CAP Upgrd Compre MGMT Plan | | 79,643 | 83,865 | - |
| Edgecumbe Comprehensive Consent & Upgrade | | 31,857 | 33,546 | - |
| Edgecumbe Stormwater Study | | 79,643 | 109,590 | - |
| Tāneatua Comprehensive Consent & Upgrade | | 69,024 | 72,683 | 9,651 |
| Other Projects/Renewals Consolidated | | - | 509,277 | 299,313 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

WASTE MANAGEMENT AND MINIMISATION
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| <i>Sources of operating funding</i> | | | |
| General rates, uniform annual general charges, rates penalties | 1,676 | 1,701 | 1,645 |
| Targeted Rates | 3,483 | 3,751 | 3,725 |
| Subsidies and grants for operating purposes | 235 | 146 | 658 |
| Fees and Charges | 1,717 | 2,016 | 2,356 |
| Internal charges and overheads recovered | - | - | - |
| Local authorities fuel tax, fines, infringement fees, and other | - | - | 71 |
| Sources of operating funding (A) | 7,110 | 7,613 | 8,454 |
| <i>Applications of operating funding</i> | | | |
| Payments to staff and suppliers | 6,104 | 6,620 | 8,093 |
| Finance costs | 60 | 51 | 118 |
| Internal charges & overheads applied | 593 | 561 | 613 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 6,756 | 7,232 | 8,825 |
| Surplus (deficit) of operating funding (A-B) | 354 | 382 | (370) |
| CAPITAL | | | |
| <i>Sources of capital funding</i> | | | |
| Subsidies and grants for capital expenditure | 321 | - | - |
| Development and financial contributions | - | - | - |
| Increase (decrease) in debt | (256) | (237) | (326) |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | 65 | (237) | (326) |
| <i>Applications of capital funding</i> | | | |
| Capital expenditure | | | |
| - to meet additional demand | 5 | 5 | 9 |
| - to improve level of service | 328 | 9 | 21 |
| - to replace existing assets | 29 | 46 | 70 |
| Increase (decrease) in reserves | 57 | 85 | (797) |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 419 | 145 | (696) |
| Surplus (deficit) of capital funding (C-D) | (354) | (382) | 370 |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

WASTE MANAGEMENT AND MINIMISATION
SCHEDULE OF MAJOR PROJECTS
30 JUNE 20204

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|--|-------------------------|----------------|----------------|----------------|
| Murupara Transfer Station Improvements | Complete | 8,843 | 9,158 | 13,667 |
| Recycling Park Minor Improvements | Complete | 5,202 | 5,387 | 6,041 |
| Local Organic Waste Processing Plant | Project not progressing | - | 403,190 | - |
| Renewals | | 46,337 | 47,985 | 80,862 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

COMMUNITY EXPERIENCE
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| Sources of operating funding | | | |
| General rates, uniform annual general charges, rates penalties | 12,033 | 12,186 | 11,785 |
| Targeted Rates | - | - | - |
| Subsidies and grants for operating purposes | 19 | 20 | 64 |
| Fees and Charges | 2,595 | 2,823 | 2,777 |
| Internal charges and overheads recovered | 1,865 | 1,897 | 2,089 |
| Local authorities fuel tax, fines, infringement fees, and other | 261 | 105 | 592 |
| Sources of operating funding (A) | 16,774 | 17,031 | 17,307 |
| Applications of operating funding | | | |
| Payments to staff and suppliers | 8,331 | 8,485 | 10,585 |
| Finance costs | 505 | 621 | 1,059 |
| Internal charges & overheads applied | 6,914 | 6,554 | 7,850 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 15,750 | 15,660 | 19,495 |
| Surplus (deficit) of operating funding (A-B) | 1,023 | 1,371 | (2,188) |
| CAPITAL | | | |
| Sources of capital funding | | | |
| Subsidies and grants for capital expenditure | 1,197 | 52 | 638 |
| Development and financial contributions | 121 | 123 | 143 |
| Increase (decrease) in debt | 5,770 | 3,822 | 4,239 |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | 7,088 | 3,997 | 5,020 |
| Applications of capital funding | | | |
| Capital expenditure | | | |
| - to meet additional demand | 2,416 | 106 | 86 |
| - to improve level of service | 1,273 | 763 | 1,338 |
| - to replace existing assets | 2,339 | 1,780 | 2,551 |
| Increase (decrease) in reserves | (3,404) | (1,381) | (1,142) |
| Increase (decrease) of investments | 5,488 | 4,100 | - |
| Applications of capital funding (D) | 8,111 | 5,368 | 2,832 |
| Surplus (deficit) of capital funding (C-D) | (1,023) | (1,371) | 2,188 |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

Finance and Performance Committee - AGENDA

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

COMMUNITY EXPERIENCE
SCHEDULE OF MAJOR PROJECTS
30 JUNE 2024

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|---|--|----------------|----------------|----------------|
| Library Collection Improvement | Complete | 31,212 | 32,322 | 21,676 |
| BOF-Hono Hapori Community Outreach | Better Off Funded Project, balance carried forward to 2025 | - | 446,107 | 212,681 |
| Playground Shade Sails | | 41,453 | 43,472 | 40,892 |
| Whakatane Escarpment Mitigation | Complete, third party cost recovery of \$88k | - | 79,394 | 171,431 |
| Awatapu Lagoon Wetland Construction | | - | 419,460 | 24,946 |
| Bollards | Complete | - | 150,000 | 151,790 |
| Mitchell Park Market Space Drainage | Balance carried forward to 2025 | - | 50,000 | - |
| Mitchell Park Market Space Landscape & Shade | Balance carried forward to 2025 | - | 150,000 | - |
| Mitchell Park Market Space Toilets | Balance carried forward to 2025 | - | 300,000 | - |
| Sullivan Lake Foopaths & Retaining Walls | Complete | - | 5,105 | 5,197 |
| BOF-Southern Districts Regeneration - Minginui | Better Off Funded Project, balance carried forward to 2025 | - | 150,000 | - |
| BOF-Southern Districts Regeneration - Miurupara | Better Off Funded Project, balance carried forward to 2025 | - | 199,999 | - |
| Whakatane New Cemetery | Rebudgeted in the LTP | 518,162 | 1,091,056 | 16,343 |
| Whakatane Aquatic New Office&Training Space | | - | 150,000 | 93,813 |
| Tidal Pool Remediation | Project underway, balance carried forward to 2025 | - | 187,638 | 37,606 |
| Wharfside Fire&Safety Upgrade | Balance carried forward to 2025 | - | 40,000 | - |
| Wharfside Glass Doors & Windows | Complete | - | 50,000 | 54,479 |
| Wharfside Landscaping & Shade | Balance carried forward to 2025 | - | 100,000 | - |
| Wharfside Toilets | Balance carried forward to 2025 | - | 350,000 | - |
| Whakatane Harbour Eastern Wall Strengthening | Rebudgeted in the LTP (2026 & 2027) | - | 479,870 | - |
| Holiday Park - Renewals | | 51,816 | 180,000 | 94,696 |
| Holiday Park Upgrades | | 51,816 | 60,000 | 53,661 |
| Multi, Sports Events Centre | | 103,632 | 207,263 | 83,811 |
| BOF-Earthquake Strengthening Halls-Enhance Resilience | Better Off Funded Project, balance carried forward to 2025 | - | 755,561 | 425,264 |
| Other Projects/Renewals Consolidated | | 1,850,999 | 3,160,543 | 2,486,415 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

COMMUNITY SAFETY
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| Sources of operating funding | | | |
| General rates, uniform annual general charges, rates penalties | 4,033 | 4,019 | 3,887 |
| Targeted Rates | - | - | - |
| Subsidies and grants for operating purposes | 310 | 320 | 497 |
| Fees and Charges | 3,457 | 3,527 | 2,955 |
| Internal charges and overheads recovered | 51 | 52 | 37 |
| Local authorities fuel tax, fines, infringement fees, and other | 134 | 137 | 217 |
| Sources of operating funding (A) | 7,986 | 8,054 | 7,593 |
| Applications of operating funding | | | |
| Payments to staff and suppliers | 3,861 | 3,903 | 4,809 |
| Finance costs | 78 | 68 | 117 |
| Internal charges & overheads applied | 3,635 | 3,257 | 4,299 |
| Other operating funding applications | - | - | - |
| Applications of operating funding (B) | 7,574 | 7,228 | 9,226 |
| Surplus (deficit) of operating funding (A-B) | 411 | 827 | (1,633) |
| CAPITAL | | | |
| Sources of capital funding | | | |
| Subsidies and grants for capital expenditure | - | 21 | 176 |
| Development and financial contributions | - | - | - |
| Increase (decrease) in debt | (268) | (277) | 1,135 |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | (268) | (256) | 1,311 |
| Applications of capital funding | | | |
| Capital expenditure | | | |
| - to meet additional demand | - | - | - |
| - to improve level of service | - | - | 176 |
| - to replace existing assets | - | 21 | - |
| Increase (decrease) in reserves | 143 | 550 | (40) |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 143 | 571 | 136 |
| Surplus (deficit) of capital funding (C-D) | (411) | (827) | 1,175 |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

COMMUNITY SAFETY
SCHEDULE OF MAJOR PROJECTS
30 JUNE 2024

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|------------------------------------|--|----------------|----------------|----------------|
| Speed Limit Sign - Enhancement | Project did not progress | 20,808 | 21,548 | - |
| BOF Emergency Community Resilience | Better Off Funded Project, balance carried forward to 2025 | - | 638,707 | 175,546 |

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

CORPORATE AND DISTRICT ACTIVITIES
INDICATIVE FUNDING IMPACT STATEMENT
30 JUNE 20204

| | LTP 2022/23 \$000 | LTP 2023/24 \$000 | Actual 2023/24 \$000 |
|---|-------------------------|-------------------------|----------------------------|
| OPERATIONAL | | | |
| Sources of operating funding | | | |
| General rates, uniform annual general charges, rates penalties | 108 | 2,542 | 3,947 |
| Targeted Rates | - | - | - |
| Subsidies and grants for operating purposes | - | - | 31 |
| Fees and Charges | 3 | 29 | 103 |
| Internal charges and overheads recovered | 17,125 | 15,551 | 19,829 |
| Local authorities fuel tax, fines, infringement fees, and other | 910 | 361 | 735 |
| Sources of operating funding (A) | 18,146 | 18,483 | 24,646 |
| Applications of operating funding | | | |
| Payments to staff and suppliers | 13,462 | 13,169 | 16,381 |
| Finance costs | 1,043 | 65 | 2,321 |
| Internal charges & overheads applied | 518 | 1,593 | 587 |
| Other operating funding applications | 973 | 1,505 | 663 |
| Applications of operating funding (B) | 15,996 | 16,332 | 19,951 |
| Surplus (deficit) of operating funding (A-B) | 2,150 | 2,151 | 4,694 |
| CAPITAL | | | |
| Sources of capital funding | | | |
| Subsidies and grants for capital expenditure | - | - | 637 |
| Development and financial contributions | - | - | - |
| Increase (decrease) in debt | 6,995 | (90) | 18,763 |
| Gross proceeds from sale of assets | - | - | - |
| Lump Sum Contributions | - | - | - |
| Other dedicated capital funding | - | - | - |
| Sources of capital funding (C) | 6,995 | (90) | 19,400 |
| Applications of capital funding | | | |
| Capital expenditure | | | |
| - to meet additional demand | 5,389 | 2,079 | 137 |
| - to improve level of service | 3,418 | 91 | 1,013 |
| - to replace existing assets | 1,085 | 1,257 | 1,271 |
| Increase (decrease) in reserves | (746) | (1,365) | 21,674 |
| Increase (decrease) of investments | - | - | - |
| Applications of capital funding (D) | 9,145 | 2,062 | 24,094 |
| Surplus (deficit) of capital funding (C-D) | (2,150) | (2,151) | (4,694) |
| Funding Balance ((A-B) + (C-D)) | - | - | - |

Finance and Performance Committee - AGENDA

7.4.2 Appendix 2 - Indicative GOA Financials 22 August 2024(Cont.)

CORPORATE SERVICES
SCHEDULE OF MAJOR PROJECTS
30 JUNE 20204

| Project Name | Project Comment | Long Term Plan | Revised Budget | Actual 2023/24 |
|--|--|----------------|----------------|----------------|
| ERP Replacement | Reclassified as Opex and Rebudgeted in LTP | 2,078,720 | 2,000,000 | - |
| Alarms and Cameras TeKoputu, Customer Services &AC | | - | 40,000 | - |
| Exhibition Centre LED Lighting | | - | 81,621 | 6,134 |
| Library HVAC - fit for purpose | | - | 138,009 | - |
| BOF - CCTV Upgrade Enhancement | | - | 718,868 | 637,168 |
| Other Projects/Renewals Consolidated | | 1,347,939 | 1,603,371 | 1,777,219 |

7.4.3 Appendix 3 - Whole of Council Financial Statement

7.4.3 Appendix 3 - Whole of Council Financial Statement

Appendix 3 - Whole of Council Financial Statement will be tabled at the Finance and Performance Committee meeting dated Thursday, 29 August 2024.

7.5 2023-2024 Resident Survey Report

7.5 2023-2024 Resident Survey Report



To: **Finance and Performance Committee**

Date: **Thursday, 29 August 2024**

Author: **H Allison / Strategic Policy Analyst**

Authoriser: **L Woolsey / Manager Strategy and Performance**

Reference: **A2719341**

1. Reason for the report - *Te Take mō tēnei rīpoata*

The purpose of this report is to provide the Finance and Performance Committee with the Annual Resident Survey results for the 2023/24 financial year (1 July 2023 - 30 June 2024).

The report will be presented by Dr Virgil Troy, Managing Director of SIL Research - the research specialists conducting the survey on Council's behalf.

The full report is attached in **Appendix 1**.

2. Recommendation - *Tohutohu akiaki*

THAT the Annual Residents Survey Results 2023/24 report be **received**.

3. Background - *He tirohanga whakamuri*

Whakatāne District Council has commissioned a Resident Survey to determine levels of satisfaction with Council's services, communications, and management, and to identify opportunities for improvement. The survey is an important part of the feedback loop for Council, and provides results for measures included within our Long-Term Plan.

The survey is conducted quarterly throughout year, with respondents asked to focus their responses on the three months prior. The full year findings attached to this report represent the cumulative results from the four quarterly monitors to produce overall results for the 2023/24 financial year.

Due to the performance measure changes within the new 2024/34 Long-Term Plan, some questions in the upcoming Residents Survey have been updated to reflect this.

7.5 2023-2024 Resident Survey Report(Cont.)

4. Discussion - *Kaupapa*

4.1. Key findings

Overall, over half (53%) of residents were satisfied with services received from the Council over the 2023-24 year. This is a decrease from the 61% result in 2022/23 and on par from the 2023 NZ benchmark of 54%. Supporting these overall perceptions, 18 out of 29 (62% vs. 79% in 2023) Council services rated by Whakatāne District residents achieved satisfaction ratings of 60% or above, with five services achieving 80% satisfaction or higher (five fewer than 2022/23).

Across the 2023/24 survey year, the five top-rated services were kerbside waste collection (89% satisfaction), Whakatāne crematorium (84%), Whakatāne Exhibition Centre (84%), libraries (81%), and parks or reserves (80%).

Two-thirds (64%) of residents agreed (somewhat or strongly) that the Whakatāne District is generally a safe place to live (down from 69% in 2023, but remaining above the New Zealand Benchmarking Survey result of 60%). Three-in-five (60%) residents believed the quality of their life was 'good' to 'very good' (continuing a downward trend compared to recent years).

Community engagement increased in 2024 – overall and across specific activities – with over half (54%) of respondents engaging with Council in some way (up from 43% in 2023 and 40% in 2022). Responding to Council surveys (52%, up from 46%, in 2023), and providing feedback on social media (37%, up from 33%) remained the most prevalent activities. However, there was also a marked increase of residents making a formal submission (29%, compared to 21% in 2023) – likely reflecting engagement with the Long-Term Plan process and/or other Council-led consultations.

4.2. Areas for improvement

Many services saw declines in satisfaction in the last year. The largest drops among users in 2023/24 were measured for public halls (67%, down from 87% in 2023), cemeteries (69%, down from 82% in 2023), and drinking water quality (57%, down from 68% in 2023). The two lowest-rated services in 2023/24 continued to be dog control (40%) and council roads overall (48%).

Satisfaction with Community Facilities decreased 11% on the previous year with a result of 68%. However, this is still on par to the NZ benchmark. Satisfaction with water also decreased by 9% on the previous year with a result of 63%.

Satisfaction with Council's day-to-day business management also saw related declines overall (33%, 46% in 2023). Fewer residents in 2024 trusted WDC's financial management around value for money (22%), trust to make good spending decisions (20%), and managing finances well (19%).

Satisfaction with Council leadership did see some decreases in 2024 – overall (36%, 44% in 2023), leadership of the Mayor (42%, 47% in 2023), councillor leadership (34%, 44% in 2023) and strategies for developing prosperity and wellbeing (30%, 40% in 2023). Satisfaction with Council's day-to-day business management also saw related declines overall (33%, 46% in 2023), and across all specific attributes. Fewer residents in 2024 trusted WDC's financial management around value for money (22%, 34% in 2023), trust to make good spending decisions (20%, 32% in 2023), and managing finances well (19%, 31% in 2023).

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24

5. Significance and Engagement Assessment - Aromatawai Pāhekoheko

5.1. Assessment of Significance

Given that there are no decisions directly affecting the public (regarding this report), the decisions and matters of this report are assessed to be of low significance, in accordance with the Council's Significance and Engagement Policy.

5.2. Engagement and community views

The SIL report attached is a result of the engagement with Whakatāne District's residents to determine levels of satisfaction and perceptions of Council's services. Following this meeting the survey report will be made available on Council's website, allowing for public access to the results.

6. Considerations - *Whai Whakaaro*

6.1. Financial/budget considerations

There is no budget considerations associated with the recommendations of this report.

6.2. Strategic alignment

A portion of the survey results reported in the survey are performance measures within the Long-Term Plan 2021/31 and will be reported on in the Annual Report 2023/24.

6.3. Climate change assessment

The annual survey results provide insights on whether the community would like to see the Council spend more, about the same, or less on taking action on climate change.

Based on the climate change assessment, the decisions and matters of this report are assessed to have low climate change implications and considerations, in accordance with the Council's Climate Change Principles.

6.4. Risks

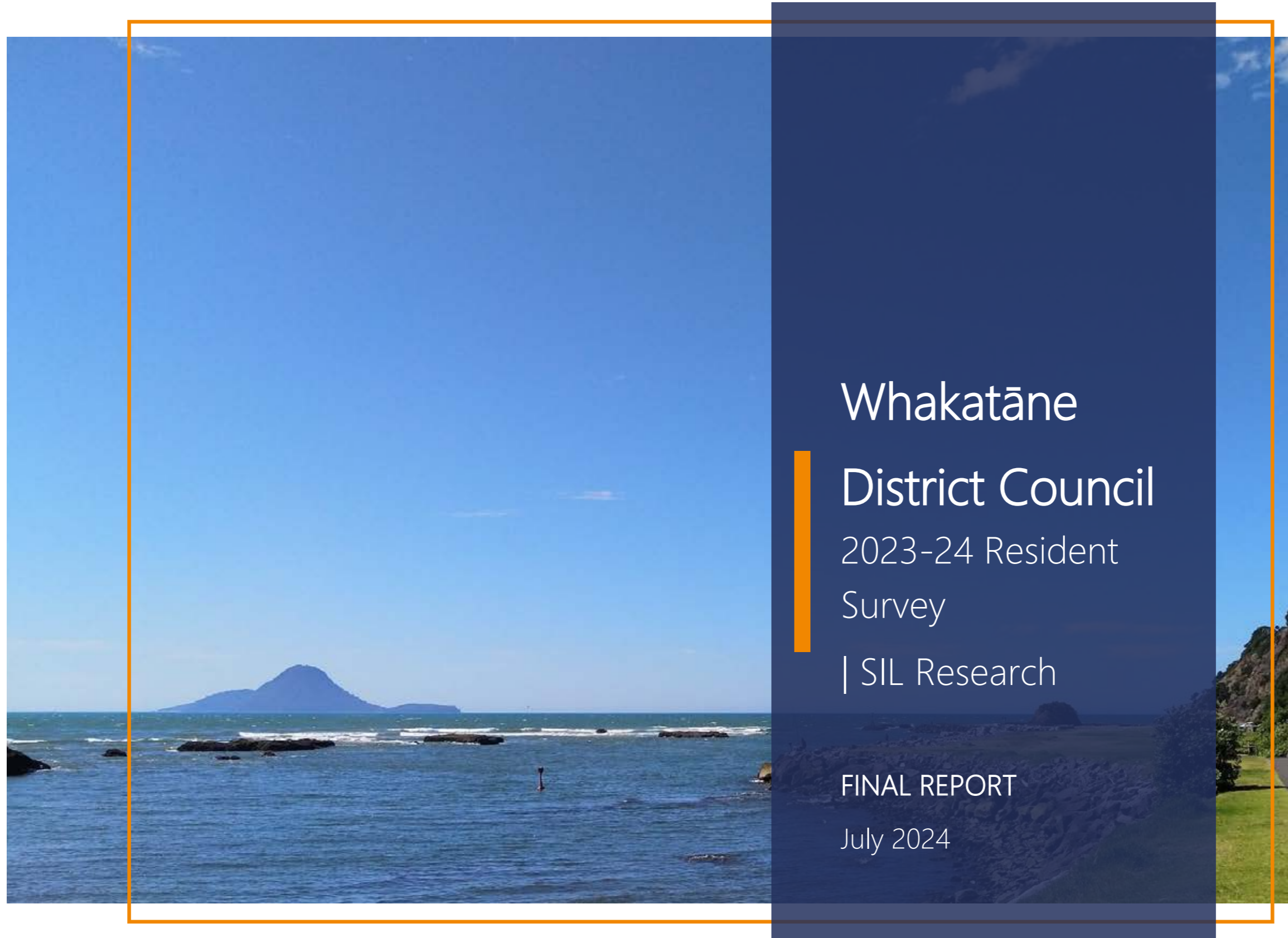
There may be a minor reputational risk associated with the decrease in some results.

Attached to this report:

- Appendix 1: Whakatāne District Council 2023/24 Resident Survey.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)



Whakatāne

District Council

2023-24 Resident
Survey

| SIL Research

FINAL REPORT

July 2024

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

Contact: Dr Virgil Troy 06 834 1996 or virgiltroy@silresearch.co.nz

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SIL RESEARCH
Strategy | Insights | Leverage



7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

CONTENTS

5.

EXECUTIVE
SUMMARY

10.

SATISFACTION AT
A GLANCE

12.

METHODOLOGY

9.

OVERALL
SATISFACTION

18.

SATISFACTION
WITH COUNCIL
SERVICES AND
FACILITIES

53.

LIFE IN THE
DISTRICT

55.

CONTACT WITH
COUNCIL

56.

COMMUNICATION
AND COMMUNITY
ENGAGEMENT

58.

COMMUNICATION

60.

COUNCIL
LEADERSHIP

62.

MANAGEMENT

64.

POLICY AND
DIRECTION

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

| | | | |
|--|----|---|----|
| Parks and reserves | 19 | Cemeteries overall | 36 |
| Walking and cycling facilities in the District | 20 | Boat ramps and wharf facilities | 37 |
| Playgrounds | 21 | Noise control | 38 |
| Sports fields | 22 | Dog control..... | 39 |
| Public swimming pools | 23 | Kerbside waste collection service | 40 |
| Public toilets | 24 | Refuse transfer station facilities | 41 |
| Footpaths | 25 | Council roads overall..... | 42 |
| Street lighting..... | 26 | Safety of Council roads | 43 |
| Libraries in the District | 27 | Parking in Whakatāne..... | 44 |
| Public halls | 29 | Tourism promotion | 45 |
| Te Whare Taonga o Taketake | 30 | Whakatāne as a holiday destination and tourism impact on the community | 46 |
| Water supply | 31 | Efforts to enable and promote events | 47 |
| Quality of drinking water..... | 32 | Business promotion | 48 |
| Stormwater service | 33 | Spending priorities..... | 49 |
| Sewerage system | 34 | Potential improvements | 52 |
| Whakatāne crematorium facility | 35 | | |

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

EXECUTIVE SUMMARY

The purpose of this research was to consultatively engage with Whakatāne District's residents to determine levels of satisfaction and perceptions of Council's services, communications and management to identify opportunities for improvement.

Research was conducted quarterly throughout the 2023-24 year (data collected between October 2023 and June 2024). A total of n=600 surveys were used in the final analysis. The 2024 surveys continued the adjusted methodology adopted in 2019-20 (particularly mixed-method data collection, and rating scale expansion), and subsequent refinement to have respondents focus their responses on the three months (rather than the last 12 months) prior to each quarterly fieldwork period.

It remains important to consider the impact of national and regional contextual conditions when evaluating satisfaction levels and ability of the Council to meet community needs in 2023-24. The cost of living in New Zealand continues to increase, with local Whakatāne District residents feeling ongoing financial pressure and becoming increasingly conscious of the impacts on their own finances as well as wider spending within the District. In this context, the latest Long Term Plan consultation process would have brought Council spending and financial management to the forefront of residents' minds, particularly in light of proposed rates increases – with the relative priorities of Council spending decisions especially salient given the anticipated impacts on residents' own household budgets. At this time, perceptions of and reactions to a range of Council-led developments, in addition to regular service delivery, are likely to be viewed by residents with a more critical eye focused on efficiency and cost-saving in a tough economic climate. The Whakatāne District Council operated in a challenging environment marked by these, along with other, factors; which had an impact on the community and potentially influenced the perception of Council's performance.

The main findings in 2024 were as follows:

- 1 Overall, over half of residents (53%) were satisfied with services received from the Whakatāne District Council over the 2024 year (lower than 61% in 2023, but on par with both the overall national (54%) and district council (56%) New Zealand Benchmarking Survey figures.
 - Supporting these overall perceptions, 18 out of 29 (62% vs. 79% in 2023) Council services rated by Whakatāne District residents achieved satisfaction ratings of 60% or above, with 5 services achieving 80% satisfaction or higher.



7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

- Across the 2024 survey year, the five top-rated services were kerbside waste collection (89% satisfaction), Whakatāne crematorium (84%), Whakatāne Exhibition Centre (84%), libraries (81%), and parks or reserves (80%). In contrast, the two lowest-rated services in 2024 were: dog control (40%) and council roads overall (48%).
- Contributing to overall satisfaction, many services saw declines in satisfaction in the last year. The largest drops among users in 2024 were measured for public halls (-19 points), cemeteries (-14 points), and drinking water quality (-10 points).
- In contrast, increased satisfaction in 2024 was measured for noise control (+13 points), road safety (+3 points) and dog control (+2 points).

2 Two-thirds (64%) of residents agreed (somewhat or strongly) that the Whakatāne District is generally a safe place to live (down from 69% in 2023, but remaining above the New Zealand Benchmarking Survey result of 60%). 3-in-5 (60%) of residents believed the quality of their life was *'good'* to *'very good'* (continuing a downward trend compared to recent years).

- In this context, residents in 2024 were less likely to recommend Whakatāne District as a place to live (NPS -16%), which continued a declining trend observed over recent years. Nevertheless, residents remained more likely to recommend the District as a holiday destination (anecdotal NPS +4%), although this indicator also showed a decline compared to 2023.
- Contact with specific Council representatives in 2024 remained similar to 2023. 36% of residents had contacted the customer service front desk (up from 30% in 2023), with 73% satisfied with this contact (similar to 2023). Just 10% had contact with a Community Board Member (also 10% in 2023), with 73% satisfied.
- Community engagement increased in 2024 – overall and across specific activities – with over half (54%) of respondents engaging with Council in some way (up from 43% in 2023 and 40% in 2022). Responding to Council surveys (52%, up from 46%, in 2023), and providing feedback on social media (37%, up from 33%) remained the most prevalent activities. However, there was also a marked increase in 2024 of residents making a formal submission

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

(29%, compared to 21% in 2023) – likely reflecting engagement with the Long Term Plan process and/or other Council-led consultations.

- *'Social media'* remained the most preferred method of Council communication in 2024; for 60% of residents overall, and 71% of 18-39 year olds; but also an increasing number of older residents (65 or older) - 30% in 2024, up from 14% in 2023. Traditional media (e.g. newspaper, radio) remained important, especially for older residents.

3 On average, 42% of residents were satisfied with Council's communication and consultation with the public (similar to 2023). *'Listening to and acting on the needs of the people'* (27%) remained the least satisfactory communication attribute (a drop from 35% in 2022). Other communication attributes remained stable, with *'keeping people informed'* (52%) eliciting the greatest satisfaction.

- Satisfaction with Council leadership did see some decreases in 2024 – overall (36%, 44% in 2023), and in terms of councillor leadership (34%) and strategies for developing prosperity and wellbeing (30%). Satisfaction with Council's day-to-day business management also saw related declines overall (33%, 46% in 2023), and across all specific attributes. In particular, fewer residents in 2024 trusted WDC's financial management around value for money (22%), trust to make good spending decisions (20%), and managing finances well (19%).

Taken together, 2024 results should be viewed in the context of the challenging economic environment that both Council and residents are currently operating in. Residents in particular are feeling the pressures of increasing costs of living and are more likely to assess Council performance and decision making in this light. The occurrence of the Long Term Plan process in the current year has had a marked effect on resident perceptions in this regard – especially given the reality of increased rates to accommodate Council's own increased costs and financial demands. In this context, evidence indicates that residents have become even more proactively engaged in Council processes overall, and making formal submissions to Council specifically – highlighting the increased importance of these issues and concerns to residents. Specifically, a significantly higher proportion of residents registered disapproval of rates increases and Council spending in 2024 (41%, up from 18% in 2023) – with investment in roading, boat harbour and other developments of primary concern. In addition, the proportions of residents calling for increased spending in service areas have decreased across the board, while spontaneous comments calling for less spending have increased.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

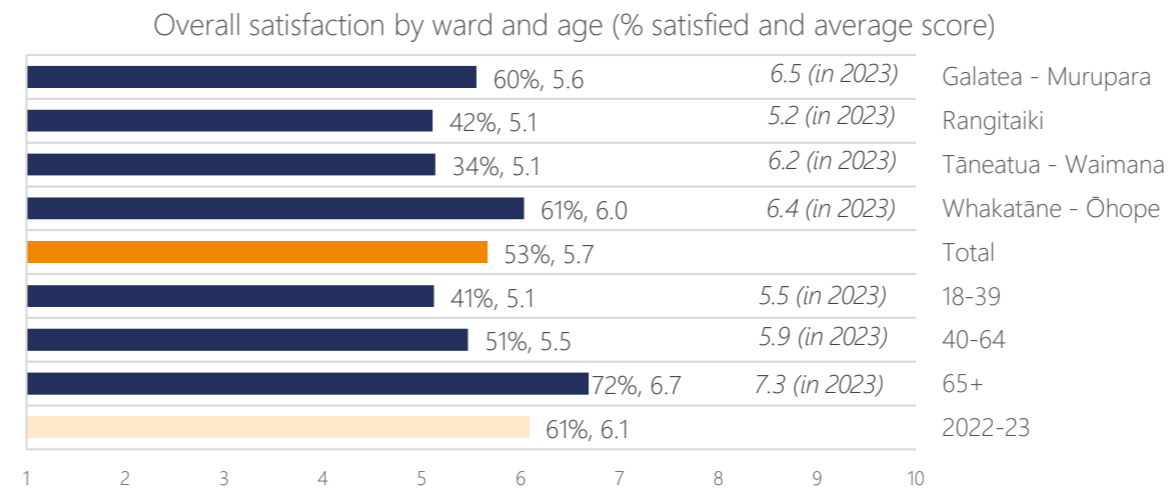
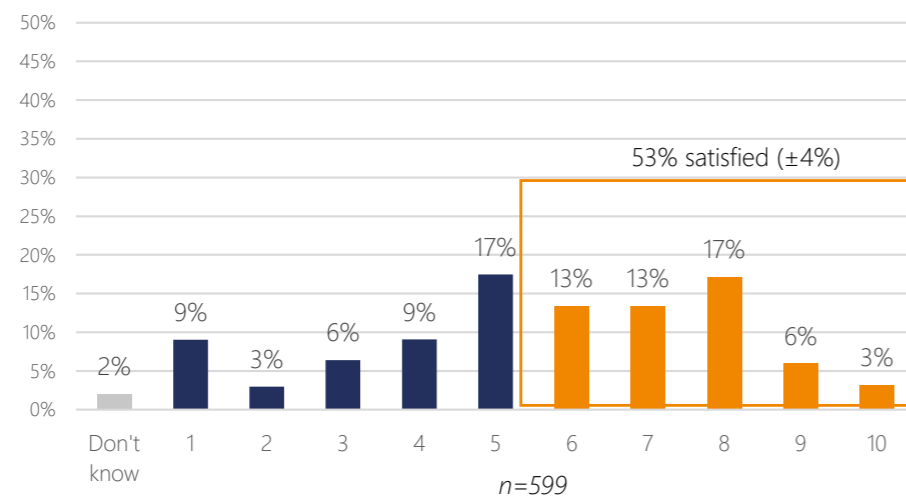
Whakatāne District Council does not face these challenges in isolation – similar effects are being felt by Councils nationwide, as measured in decreases across national benchmark figures in the current year. Despite decreases in WDC's own results, the Council has continued to perform well against broader benchmarks - indicating it is still maintaining comparable levels relative to similar councils nationally. Continuing to focus on core service needs and spending priorities of residents, facilitating and responding to increasingly desired community engagement, and maintaining open and honest communication with the public, will provide the Council with the best means of navigating and maximising opportunities for improvement in these challenging times.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

OVERALL SATISFACTION WITH THE COUNCIL

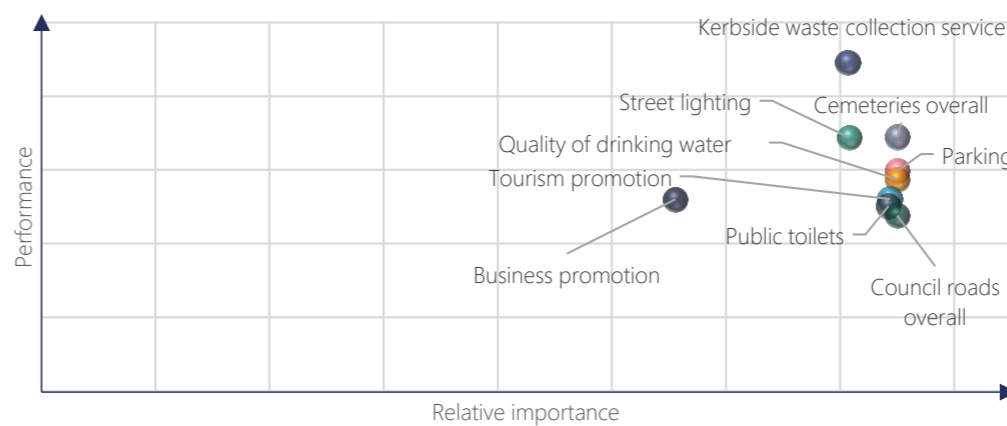
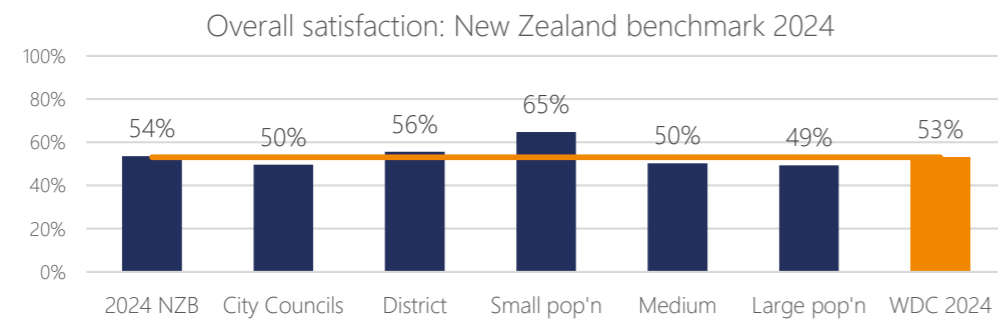
Overall satisfaction with services received from the Whakatāne District Council

LTP MEASURE



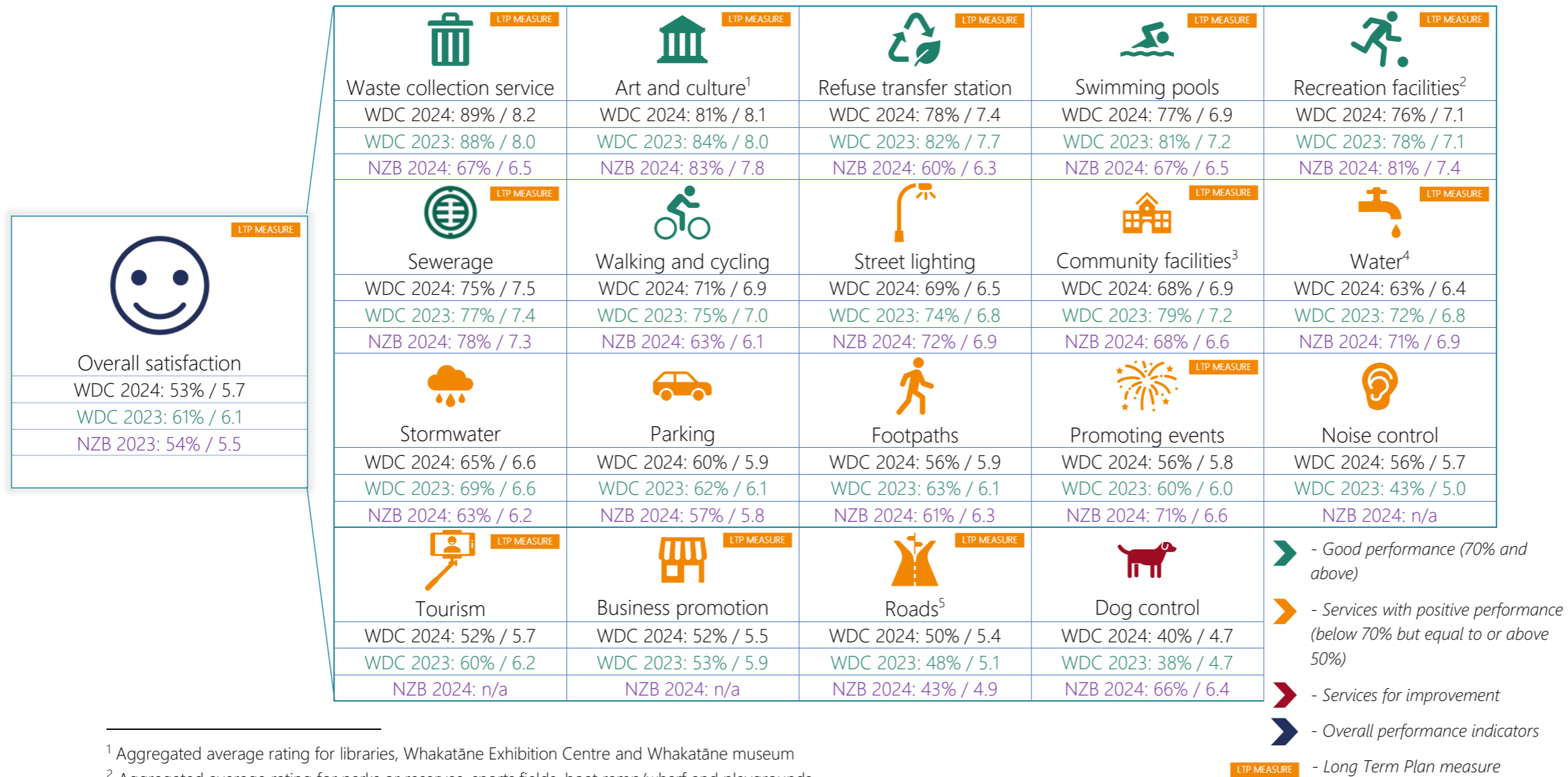
- In 2024, over half of residents (53%) were satisfied with overall services received from the Whakatāne District Council (on average rating 5.7 out of 10).
- The current result was lower than 2023 (61% satisfied, average 6.1 rating), with no significant differences, but on par with both the national (54%) and District Council (56%) averages.
- Residents aged under 65 remained less satisfied overall than older residents (aged 65+), with lower satisfaction ratings provided by all age groups compared to 2023.

- Satisfaction differed significantly by area, remaining higher in Whakatāne than in other areas, and lowest in Tāneatua - Waimana.
- Out of all services surveyed, nine showed stronger influence on overall satisfaction.
- Assessing relative importance (strength of relationship) against measured performance of these nine services, Council roads, public toilets and business/tourism promotion represented the greatest improvement opportunity (with significant importance but low performance).


























7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

SATISFACTION AT A GLANCE



¹ Aggregated average rating for libraries, Whakatāne Exhibition Centre and Whakatāne museum
² Aggregated average rating for parks or reserves, sports fields, boat ramp/wharf and playgrounds
³ Aggregated average rating cemeteries, crematorium, public halls and toilets
⁴ Aggregated average rating for water supply and quality
⁵ Aggregated average rating for roads and road safety

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

| | | | | | |
|---|---|--|---|--|--|
|  |  |  |  |  | |
| Keeps people informed | Provides sufficient opportunities for people to have their say | Makes it easy for people to transact with Council | Makes it easy for people to interact and engage | Leadership of Mayor | |
| WDC 2024: 52% / 5.5 | WDC 2024: 46% / 5.2 | WDC 2024: 44% / 5.1 | WDC 2024: 44% / 5.0 | WDC 2024: 42% / 5.0 | |
| WDC 2023: 53% / 5.6 | WDC 2023: 49% / 5.4 | WDC 2023: 48% / 5.4 | WDC 2023: 47% / 5.3 | WDC 2023: 47% / 5.2 | |
| NZB 2024: 50% / 5.3 | NZB 2024: 44% / 5.1 | NZB 2024: n/a | NZB 2024: 45% / 5.1 | NZB 2024: 46% / 5.1 | |
|  |  |  |  |  | |
| Managers and staff doing a good job | Working with other councils where relevant | Leadership of councillors | Skills and expertise to manage community affairs | Strategies for developing prosperity and wellbeing | |
| WDC 2024: 41% / 4.7 | WDC 2024: 35% / 4.6 | WDC 2024: 34% / 4.4 | WDC 2024: 31% / 4.2 | WDC 2024: 30% / 4.2 | |
| WDC 2023: 49% / 5.4 | WDC 2023: 46% / 5.3 | WDC 2023: 44% / 5.1 | WDC 2023: 44% / 5.0 | WDC 2023: 40% / 4.8 | |
| NZB 2024: 47% / 5.2 | NZB 2024: 49% / 5.3 | NZB 2024: 44% / 4.9 | NZB 2024: 49% / 5.0 | NZB 2024: 42% / 4.8 | |
|  |  |  |  |  | |
| Efficiency and effectiveness | Continual performance improvement | Listens to and acts on the needs of the people | Value for money | Trust to make good spending decisions | |
| WDC 2024: 30% / 4.1 | WDC 2024: 30% / 4.1 | WDC 2024: 27% / 3.9 | WDC 2024: 22% / 3.5 | WDC 2024: 20% / 3.4 | |
| WDC 2023: 42% / 4.8 | WDC 2023: 38% / 4.7 | WDC 2023: 35% / 4.5 | WDC 2023: 34% / 4.3 | WDC 2023: 32% / 4.1 | |
| NZB 2024: 43% / 4.8 | NZB 2024: 41% / 4.7 | NZB 2024: 34% / 4.1 | NZB 2024: 33% / 4.2 | NZB 2024: 34% / 4.1 | |
|  |  |  LTP MEASURE |  |  - Good performance (70% and above) | |
| Managing finances well | Overall performance in managing day-to-day business | Overall performance in terms of communication | Overall performance in terms of leadership (Mayor and Councillors) |  - Services with positive performance (below 70% but equal to or above 50%) | |
| WDC 2024: 19% / 3.3 | WDC 2024: 33% / 4.4 | WDC 2024: 42% / 4.9 | WDC 2024: 36% / 4.5 |  - Services for improvement | |
| WDC 2023: 31% / 4.2 | WDC 2023: 46% / 5.2 | WDC 2023: 45% / 5.2 | WDC 2023: 44% / 5.0 |  - Overall performance indicators | |
| NZB 2024: 33% / 4.2 | NZB 2024: 47% / 4.9 | NZB 2024: 44% / 4.9 | NZB 2024: 45% / 4.9 | LTP MEASURE - Long Term Plan measure | |

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

METHODOLOGY

BACKGROUND AND OBJECTIVES

As a part of its ongoing consultation process, Whakatāne District Council (WDC) commissions a Resident Satisfaction Survey every year. The purpose of this research was to consultatively engage with Whakatāne District's residents to determine levels of satisfaction and perceptions of Council's services, communications and management, to identify opportunities for improvement.



SIL Research, together with the Whakatāne District Council (WDC), developed a Resident Survey questionnaire in 2020, and repeated this in consecutive years. The initial drafting was based on research previously carried out for WDC.

The questionnaire was reviewed and tested prior to full-scale data collection to ensure the survey was fit for purpose.

MAIN CHANGES

From 2019-20, the Resident Survey has been conducted by SIL Research, and from 2020-21 data collection has been administered four times a year (quarterly) to allow for seasonal variations to be tracked using a 1-10 Likert scale, which provides more robust options for residents to express their views.

For the 2023-24 survey year, the data was collected from October (retrospectively covering the Jul-Sep quarter) to June (covering the Apr-Jun quarter) to align with WDC's annual reporting period of 1 July to 30 June.

With the change to quarterly fieldwork cycles, the recall window for respondents was also adjusted from 2020. Previously, respondents had been asked to indicate which services/facilities they had used or visited in '*the last 12 months*'. From 2021 Q1, respondents were instead asked about the services/facilities they used/visited in '*the last 3 months*'. While representing a shift from the previous method, the use of a narrower recall window should elicit more accurate responses (easier to recall behaviour over the previous 3

months than a longer 12-month period), while providing more sensitive measures of seasonal variations across quarterly cycles.

Every quarter, SIL used a multi-layered sampling technique to ensure a proportional spread of respondents from each of Whakatāne's community board areas, by age and gender distribution. Post-stratification (weighting) was then applied to the full dataset (Q1-Q4) to reflect the age and gender group proportions within each community board area as determined by Statistics New Zealand 2018 Census counts. This ensures more robust representativeness of reported results.

DATA COLLECTION

In each quarter, multiple data collection methods were utilised to ensure residents were well-represented. The mixed-methods approach included:

- (1) Telephone survey. Respondents were randomly selected from the publicly available telephone directories within specified territorial units;
- (2) Social media (available via SIL Research social media platforms, such as Facebook). The invitation advertisement was randomly promoted to District residents within specified territorial units;
- (3) Postal survey. Survey forms were sent to randomly selected Whakatāne District households within specified territorial units.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

A total of n=150 surveys were used in the final analysis each quarter, providing a combined annual sample of n=600 for the 2024 year.

DATA ANALYSIS

Surveys were conducted proportional to the population in each of Whakatāne District's community board areas.

Table 1 Responses by community board areas

| | Number of responses | Population % |
|--------------------|---------------------|--------------|
| Galatea - Murupara | 24 (4%) | 8% |
| Rangitāiki | 135 (23%) | 27% |
| Tāneatua - Waimana | 47 (8%) | 10% |
| Whakatāne - Ōhope | 394 (65%) | 55% |

Responses were also statistically weighted (post-stratification) to reflect the gender, age and ethnicity group proportions as determined by the Statistics New Zealand 2018 Census.

SIL Research ensured quality control during the fieldwork period. In addition, a quality control check was performed using follow-up calls across randomly selected respondents (10% of those who agreed to the follow up) to verify the key responses.

Further checks included, but were not limited to, removal of incomplete responses and responses coming from outside of Whakatāne District.

The main resident groups analysed in this report were: area (community board), age, gender, ethnicity, home ownership and tenure in the District. During the analysis stage of this report, two sets of statistical testing were employed while reviewing data findings: Chi-square tests were used when comparing group results in tables; and ANOVA tests were used when comparing statement averages across groups. The threshold for reporting any statistically significant differences was a p-value of 0.05. Where differences were outside this threshold (less than 95%), no comments were made; where differences were within this threshold, comments have been made within the context of their practical relevance to WDC.

2023-2024 WHAKATĀNE DISTRICT COUNCIL RESIDENT SURVEY - SIL RESEARCH | 13

Overall results are reported with margins of error at a 95% confidence level; the key reported measures in the main report include specific margins of errors calculated taking into account the survey design and finite population size correction.

NOTES ON REPORTING

The term '*Resident*' has been used to represent respondents who participated in the survey. Where results are reported by sub-groups of residents, estimates of results may not be statistically reliable due to higher margins of error (for small sample sizes).

Overall '*satisfaction*' percentages presented in this report are aggregated 6-10 responses on a 1-10 scale. Satisfaction percentages will differ from mean scores (average ratings). Satisfaction percentages represent positive ratings only, whereas mean scores provide an average of all ratings across the whole scale. Mean scores were calculated on responses excluding '*Don't know*'.

Satisfaction with Council services and facilities is reported in two ways:

- Total satisfaction percentage for the District (all responses), and
- Satisfaction percentages for '*Users/Visitors*' or '*Generally aware*' (e.g. residents who had visited/used specific Council services/facilities or knew enough to provide a rating).

Note that historical data is shown for '*Users/Visitors*' or '*Generally aware*' responses only.

Regression analysis was used to assess trends in historical results for key indicators. R² is a statistical measure based on the regression analysis of results over time. It was applied to the historical and current aggregated satisfaction ratings. In summary, the closer the R² value is to 100%, the more likely there is a trend towards an increase or decrease in performance ratings over time.

Comparative data prior to 2020 is indicative only; data collection methods before 2020 (including response scales) differed significantly from current methods.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

Due to rounding, figures with percentages may not add to 100%. Reported percentages were calculated on actual results not rounded values.

WHO TOOK PART IN THE SURVEY

Table 1 Responses by age

| | Frequency | Percent |
|--------------|------------|--------------|
| 18-39 | 183 | 31.1 |
| 40-64 | 264 | 44.8 |
| 65+ | 142 | 24.1 |
| Total | 589 | 100.0 |

Table 2 Responses by time lived in the District

| | Frequency | Percent |
|-----------------------------------|------------|--------------|
| Less than 1 year | 19 | 3.3 |
| 1 year to just under 2 years | 16 | 2.8 |
| 2 years to just under 5 years | 45 | 7.7 |
| Five years to just under 10 years | 57 | 9.7 |
| 10 years or more | 444 | 75.3 |
| I'd rather not say | 7 | 1.2 |
| Total | 589 | 100.0 |

Table 3 Responses by income

| | Frequency | Percent |
|--------------------|------------|--------------|
| \$20,000 or less | 11 | 1.8 |
| \$20,001-\$30,000 | 45 | 7.6 |
| \$30,001-\$50,000 | 64 | 10.8 |
| \$50,001-\$70,000 | 69 | 11.8 |
| \$70,001-\$100,000 | 76 | 13.0 |
| \$100,001 or more | 171 | 29.1 |
| Other | 6 | 1.0 |
| I'd rather not say | 147 | 25.0 |
| Total | 589 | 100.0 |

Table 4 Responses by home ownership

| | Frequency | Percent |
|--------------------|------------|--------------|
| Owned | 501 | 85.1 |
| Rented | 34 | 5.8 |
| Private trust | 14 | 2.4 |
| Other | 4 | 0.7 |
| I'd rather not say | 35 | 6.1 |
| Total | 589 | 100.0 |

Table 5 Responses by ethnicity (multi-choice)

| | Frequency | Percent |
|---|------------|--------------|
| New Zealand European | 432 | 75.3 |
| Māori | 171 | 29.8 |
| Pacific people | 4 | 0.7 |
| Asian | 10 | 1.7 |
| Middle Eastern, Latin American or African | 2 | 0.4 |
| Other | 36 | 6.2 |
| New Zealander/Kiwi/Not stated | 41 | 4.5 |
| Total | 600 | 100.0 |

Note: final dataset was statistically weighted to increase accuracy of the reported results.

BENCHMARKING

SIL Research conducts a representative National survey of Councils* to establish a series of benchmarks across a range of Council services. This allows Whakatāne District Council to compare their survey results against a National average (NZB).

The National survey data is collected throughout the year so that annual results can be presented without seasonal bias. The benchmarking results in this report are based on n=400 responses collected in 2024. The data is collected using a 1-10 scale; satisfaction percentages are aggregated 6-10 ratings.

Benchmarking results are reported at 95% confidence level +/- 5%. *Excludes Auckland, Wellington, Christchurch and Dunedin.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)**ENVIRONMENTAL FACTORS**

When reading this report, it is important to note that factors such as the timing of unusual or one-off events can affect the ratings that residents give, particularly if they occur close to the time when the survey data is being gathered.

Factors that may have influenced public perception of the Council's performance in 2023-24 include:

Key Q1 factors (September-October 2023):

1. In July-August 2023, following damage from recent rainfall in the past 12 months, several roads underwent repair, including culvert work on Braemar Road and Tāneatua Road.
2. In late July 2023, Waka Kotahi NZ Transport Agency conducted works on SH30, causing significant disruptions to travel in and out of Whakatāne town, which resulted in expressed vocal disappointment from the local community.
3. The Council initiated major renovation work on the main western entrance roundabout to the township, with road closures advised between September and December 2023, leading to traffic delays. The new Landing Road roundabout was open on 15 December.
4. Following an increase in costs due to high rates of inflation, rising interest rates and other national and global factors, the Council has undertaken a review of its fees and charges for 2023-2024. This review was open for the public consultation, with the fees and charges set to change from 1 December 2023.
5. In September 2023, the Council engaged with the community to gather input on draft redevelopment plans for the Rex Morpeth Recreation Hub, with the aim of creating community spaces for activities including sports, recreation, arts, culture, events, and overall well-being.
6. The 2023 New Zealand general election took place on October 14 2023, with advance voting beginning at the start of October. Nationwide political campaigns were conducted throughout the country before the election.

General elections can have a significant impact on people's perceptions of local council services, shaping residents' views regarding the quality and effectiveness of the services provided by their local councils.

Key Q2 factors (November 2023 – January 2024):

7. In October 2023, the Council initiated a community newsletter for the Rangitāiki Ward, providing community members with information about local events, council projects, news from community groups, and more.
8. The Council also continued road works and maintenance throughout the District during summer months. Additional road realignment works and watermain installation along a section of Thornton Road commenced in November.
9. In November 2023, the Council announced the installation of water meters on all connected properties within the Matatā water scheme boundary. This initiative aimed to enhance the identification of leaks, contributing to a more effective and efficient water management system.
10. December 2023 witnessed an increased Police presence in Whakatāne due to the large gang presence during two Black Power member funerals.
11. Additionally in December, the Council introduced community safety cameras, deploying a total of 80 cameras across the Whakatāne District. An independent security firm was engaged to monitor these cameras 24/7.
12. Residents of Whakatāne and Ōhope experienced a change in water quality in December 2023, attributed to ecosystem changes in the Whakatāne River resulting from warmer temperatures and increased algae growth.
13. In January 2024, the District welcomed its first international cruise ship visitors at Otuawhaki Wharf.
14. Concerns arose in Whakatāne after reports of pets being killed by dogs, leading to the initiation of a petition urging the Whakatāne District Council to enhance its dog control activities in January 2024.
15. During the holiday season, people tend to be in a more positive and celebratory mood, which can lead to improved public sentiment and perceptions. This can manifest in various ways, such as an increase in social interactions and community activities, an uptick in consumer spending, and

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

a general sense of well-being and happiness. Summer months also tend to see an increase in the use of public amenities, such as parks, beaches, and outdoor recreational areas.

Key Q3 factors (February - April 2024):

16. From February 2024, the Ministry for the Environment has standardised kerbside recycling strategy across all Councils in New Zealand. The main changes in the Whakatāne District were that residents can now recycle plastics graded 5 and empty pizza boxes, but pressurised cans are no longer acceptable.
17. In February, the Council finished and opened upgraded Braemar Water Treatment Plant, which serves communities from across the Rangitāiki Plains, from the Tarawera River to those just outside the Whakatāne township.
18. Also in February, the Council announced the He Waka Hono Hapori Community Connections and Outreach Project, which aims to provide better accessibility to Council services in remote communities. Council's goal is to bridge the gap between outlying communities and Whakatāne by providing two specially equipped vans that will serve as mobile hubs of engagement and provide information and some Council services to those unable to make the trip to a physical council building.
19. In February 2024, local media reported a 'standing room only' public meeting hosted by a local community watchdog, providing residents an opportunity to express their criticisms and concerns about various Council matters. Primary concerns focused on rates increases in the context of cost of living rises, the need to prioritise a second bridge for Whakatane, and Council spending on large projects including the Council building refurbishment, boat harbour development and Rex Morpeth Recreation Hub plan.
20. Throughout quarter three, the Council continued with road work maintenance and upgrades (e.g. Braemar Road, Stanley Road, Hillcrest Road, etc.), which also included road sealing of Matatā beach access (off Arawa Road / Pacific Coast Highway).
21. In March-April, the Council consulted with the community on their Long Term Plan strategy. The key consultation areas were the Rex Morpeth Recreation Hub, foodwaste collection, funding gap, and distribution of rates increases.

Key Q4 factors (May – July 2024):

22. In May 2024, voting opened for the Murupara Community Board by-election, open to residents in the Galatea-Waiōhau subdivision.
23. In May 2024, the Council's Infrastructure and Planning Committee approved the Three Waters Consent Replacement Strategy, which outlines the Council's approach to renewing resource consents for drinking water and wastewater. The Three Waters Consent Replacement Strategy aims to ensure the Council meets its regulatory obligations, environmental responsibilities, and community expectations for the three waters services while delivering this large work programme as efficiently as possible. The Council has allocated \$3.5 million in the draft Long Term Plan 2024-34 for the consent renewal program, with the planning, consenting and design aspects expected to take three to five years to complete.
24. In May 2024, Whakatāne District Council Elected Members approved the draft Long Term Plan for audit. The draft plan was the culmination of months of work, including Council workshops and a comprehensive community engagement phase. Council acknowledged this had been a very difficult process trying to balance confronting economic conditions with the needs and desires of the community, with an average proposed rates increase of 17.1 percent in the first year of the plan. The consultation period for public feedback elicited very high public interest with Council receiving almost 1,000 formal submissions from individuals and organisations. Overall, the feedback highlighted the complexity of balancing community needs, financial constraints and strategic priorities.
25. Subsequently, in June 2024, Council announced the adoption of its 2024-34 Long Term Plan had been delayed. The primary reason for this delay was the coalition government's about-face on Three Waters legislation late

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

in 2023. The flow-on effect was an extended independent audit process in the latter stages of plan development.

26. In June 2024, the Council announced the purchase of the property at 144 The Strand (old Credit Union). This site has been identified as a strategic location within the CBD, playing a crucial role in the town's future regeneration efforts. In the short term, the Council will relocate the

Whakatāne isite Visitor Information Centre to this building starting in late September. This is to ensure uninterrupted visitor services while Bay of Plenty Regional Council undertakes necessary upgrades to the floodwall around the current isite.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)



TOP PERFORMED

- Kerbside waste collection service - 89%
- Whakatāne Crematorium - 84%
- Whakatāne Exhibition Centre - 84%
- Public libraries - 81%
- Parks or reserves - 80%



LOWEST PERFORMED

- 40% - Dog control
- 48% - Roads overall
- 50% - Public toilets
- 52% - Road safety
- 52% - Business promotion

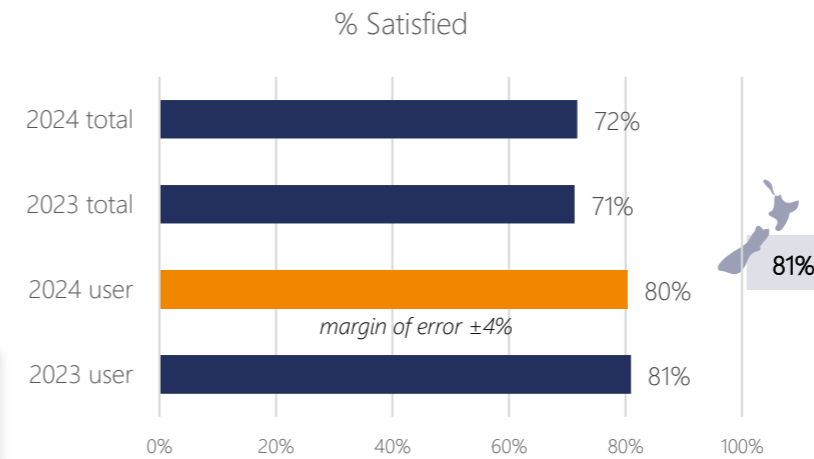
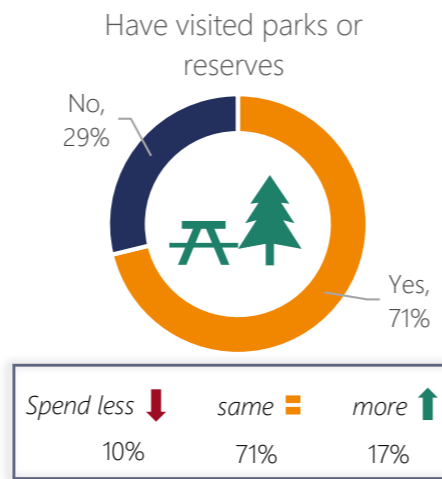
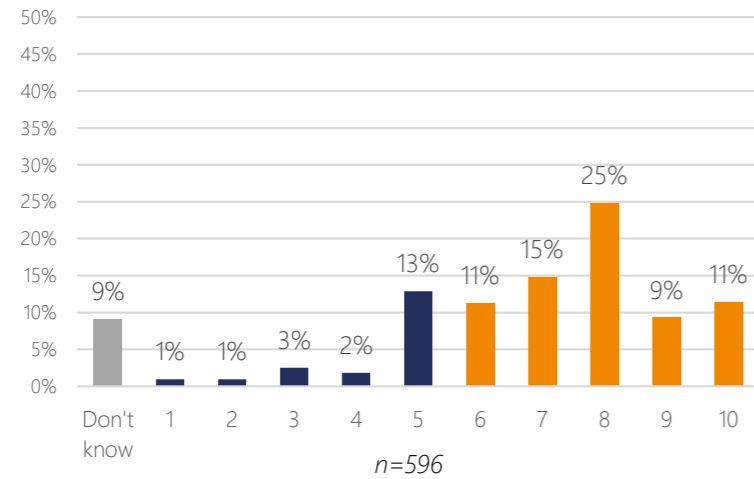


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

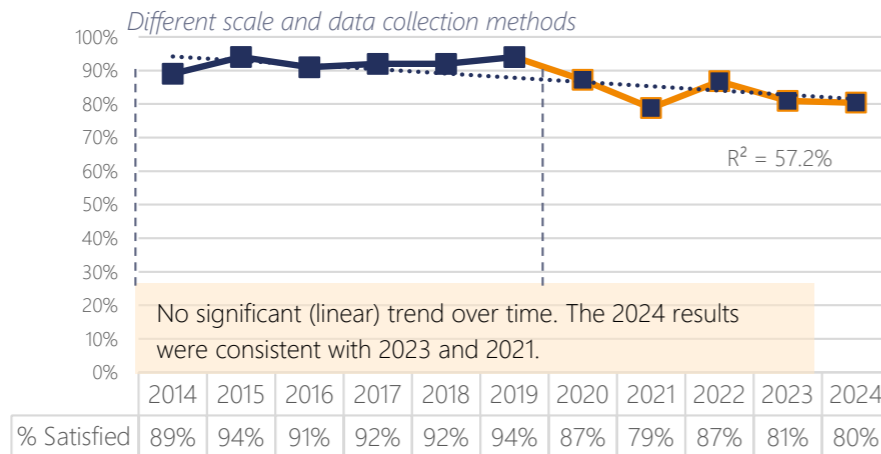
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

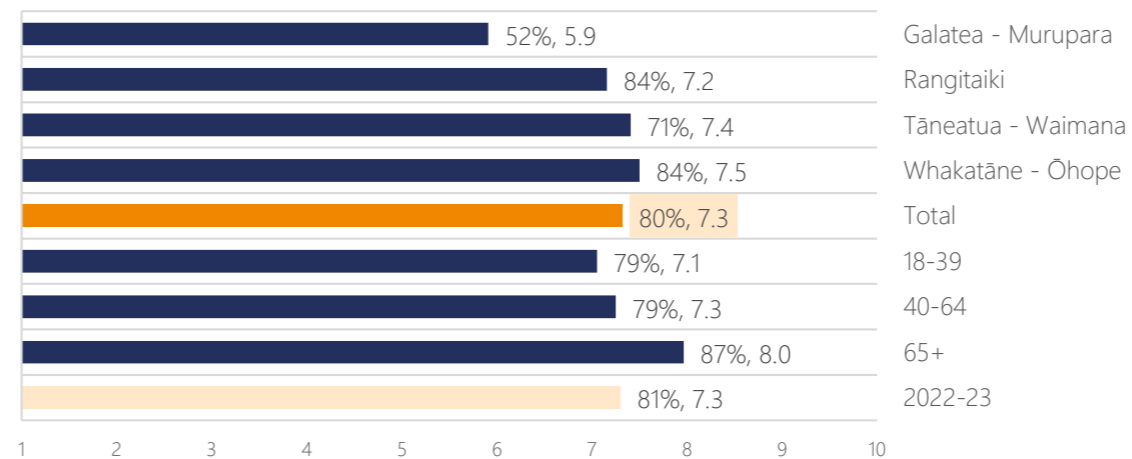
Parks and reserves



- In 2024, 71% of residents stated they had visited parks or reserves in the District (also 71% in 2023).
- 80% of these residents were satisfied with their parks or reserves, which was similar to 2023 (81%), but still below the 2022 level (87%) – but on par with the national benchmark.
- At the same time, the average satisfaction score (7.3 vs. 7.3 in 2023) remained consistent.
- There were significant differences by age and area in 2024. Satisfaction increased with age, with older residents (aged 65+) remaining most satisfied – though all age groups achieved high satisfaction.
- On average, satisfaction remained lower particularly in the Galatea-Murupara community board area.
- Overall, the majority of residents preferred seeing the same level of Council funds spent on parks or reserves (71%, similar to 67% in 2023).

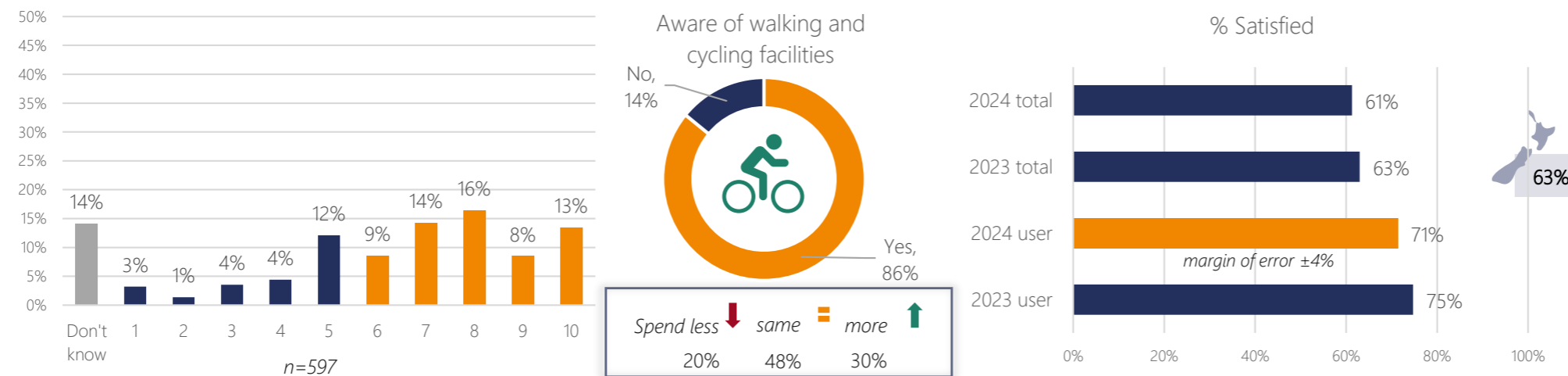


Overall satisfaction by area and age (% satisfied and average score)

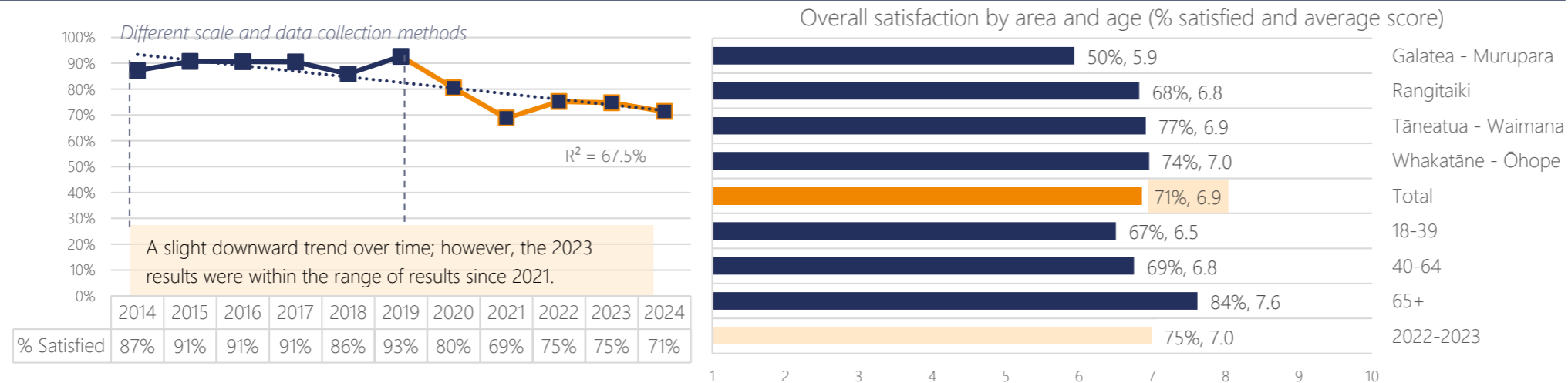


SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Walking and cycling facilities in the District



- Overall, 71% of residents who provided a rating in 2024 were satisfied with walking and cycling facilities in the District (on average 6.9 out of 10).
- Satisfaction with walking and cycling facilities was slightly lower than 2023 (75%), but within the range of the past four years – and above the national benchmark.
- In 2024, younger residents aged 18-39 remained less satisfied with walking and cycling facilities in the District (on average 6.5 out of 10).
- On average, satisfaction was lower in the Galatea-Murupara community board area (5.9, also down from 6.4 in 2023).
- A similar proportion of respondents stated they would like to see more Council funds in this area (30%, also 30% in 2023).

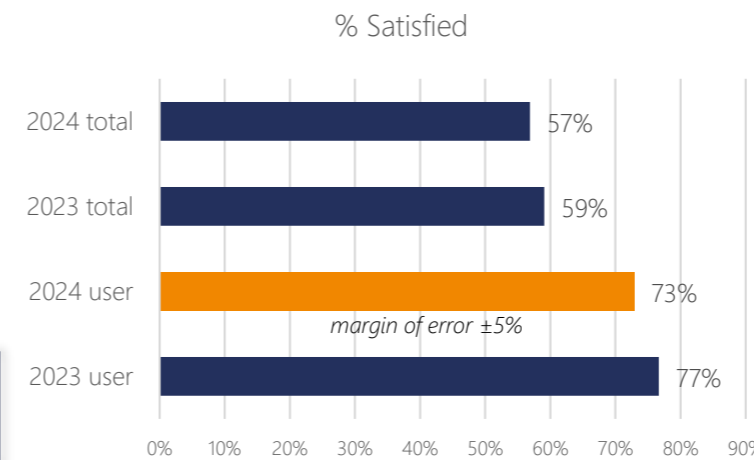
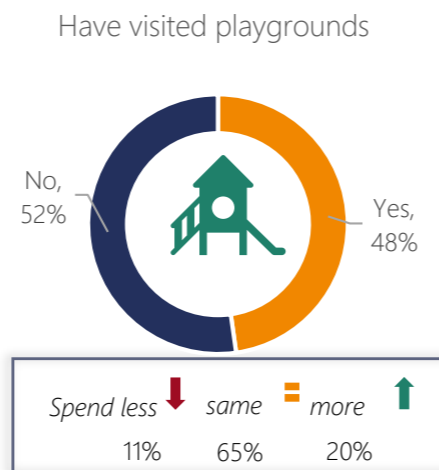
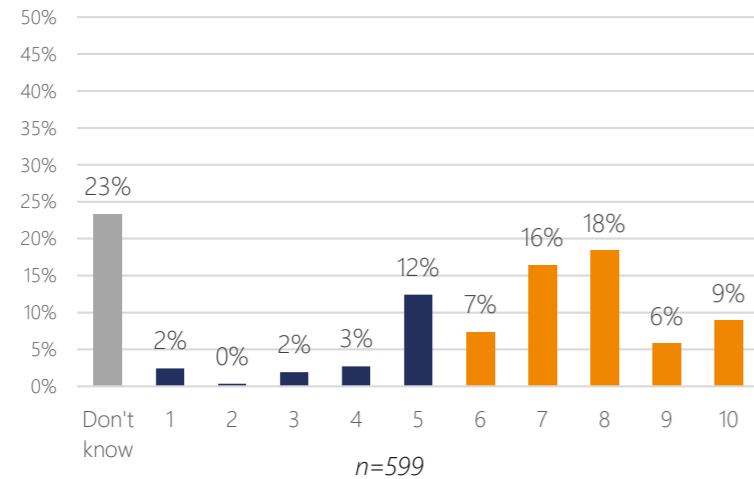


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

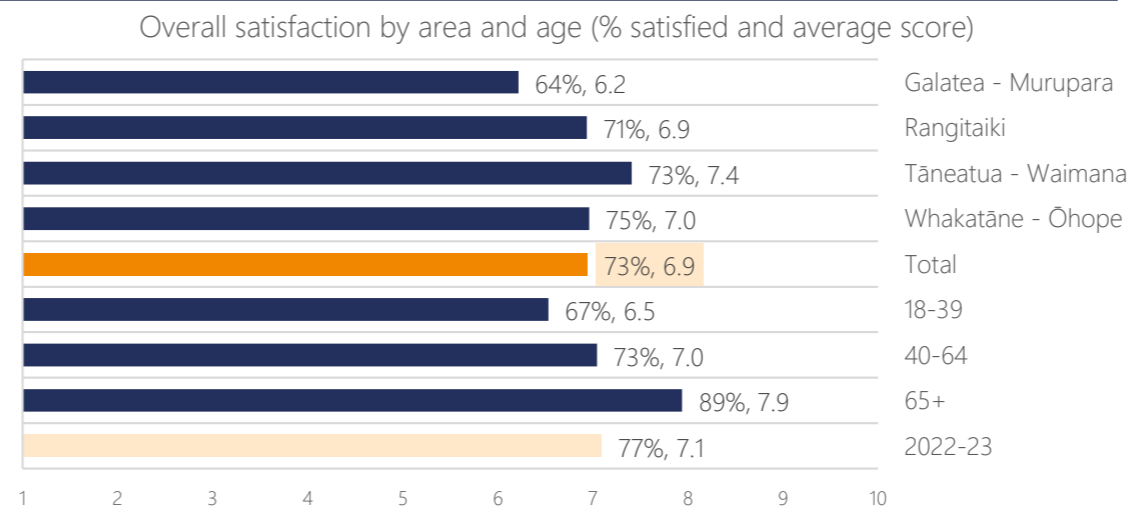
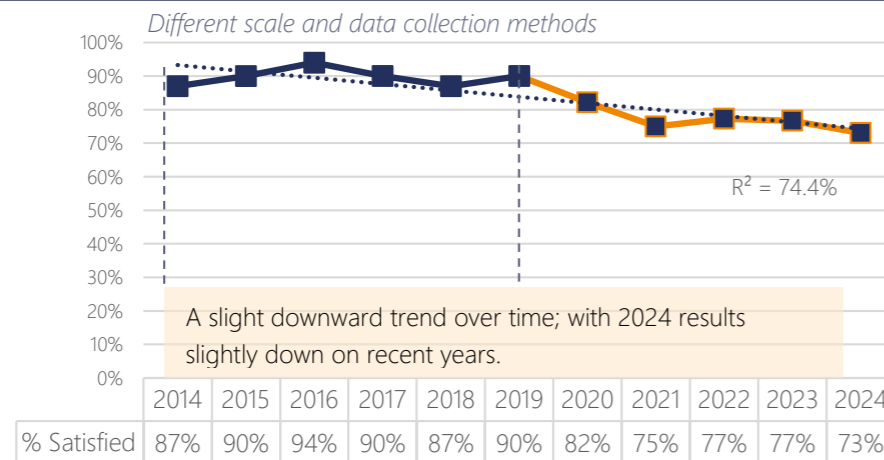
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Playgrounds



- In 2024, 48% of residents stated they had visited a playground. This was generally consistent with 2023 (46%) and 2022 (42%).
- Among playground visitors, satisfaction in 2024 (73%) was slightly lower than 2023 (77%) and recent years.
- Satisfaction with playgrounds remained lower among respondents aged under 65. Respondents from Galatea-Murupara were typically less satisfied with these facilities overall.
- Overall, 65% of residents preferred seeing the same level of Council funds spent on playgrounds (similar to 67% in 2023).

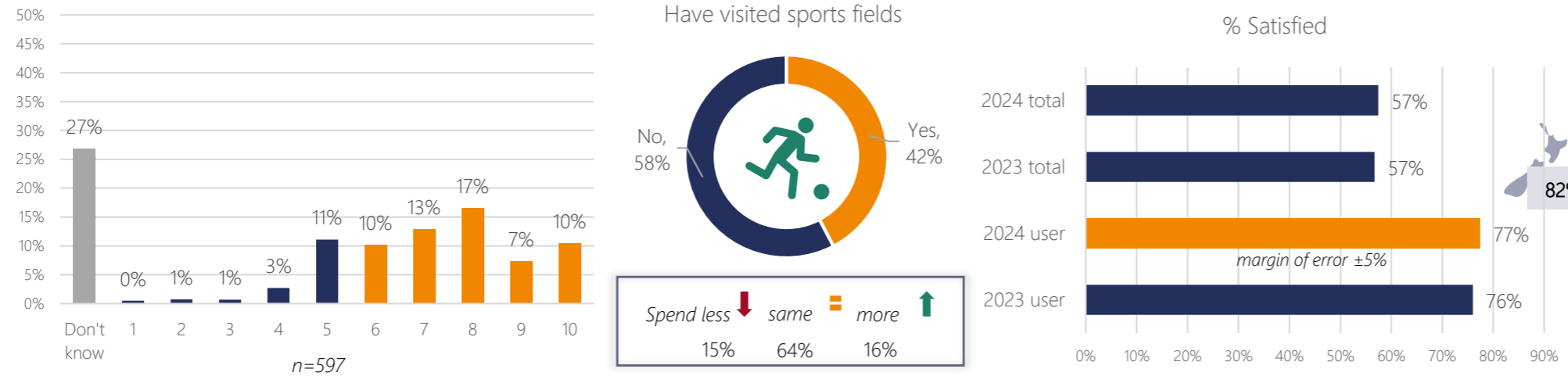


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

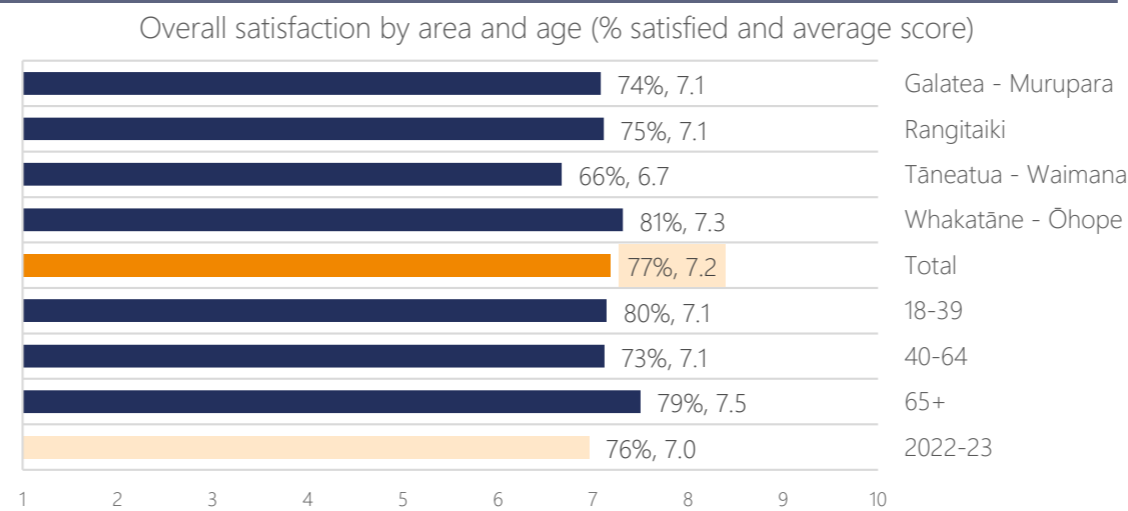
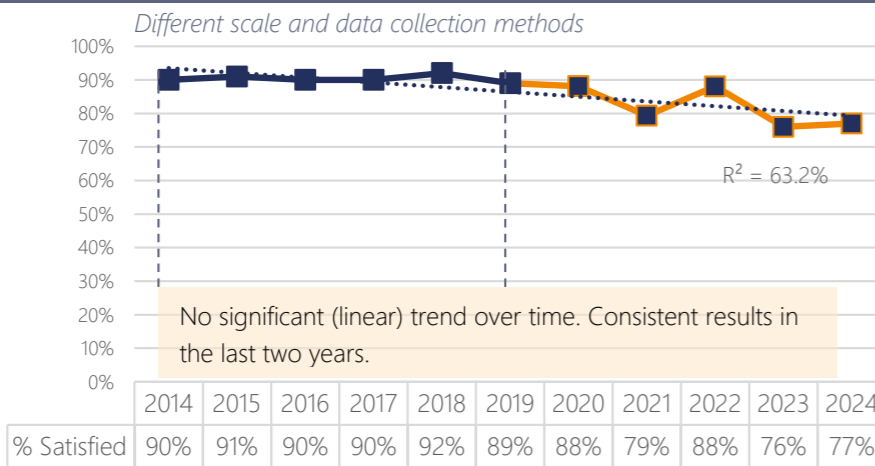
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Sports fields



- In 2024, 42% of residents reported visiting sports fields (consistent with 42% in 2023, and 39% in 2022).
- After increasing in 2022 (88%), satisfaction with sports facilities decreased in 2023 (76%) and remained consistent in 2024 (77%). 1-in-10 provided the highest satisfaction rating.
- Satisfaction remained high among 18-39 year olds in particular (80%, up slightly from 77% in 2023).
- However, there were no statistically significant differences by resident subgroups in 2024.
- Overall, 64% of residents preferred seeing the same level of Council funds spent on sports fields (similar to 68% in 2023).

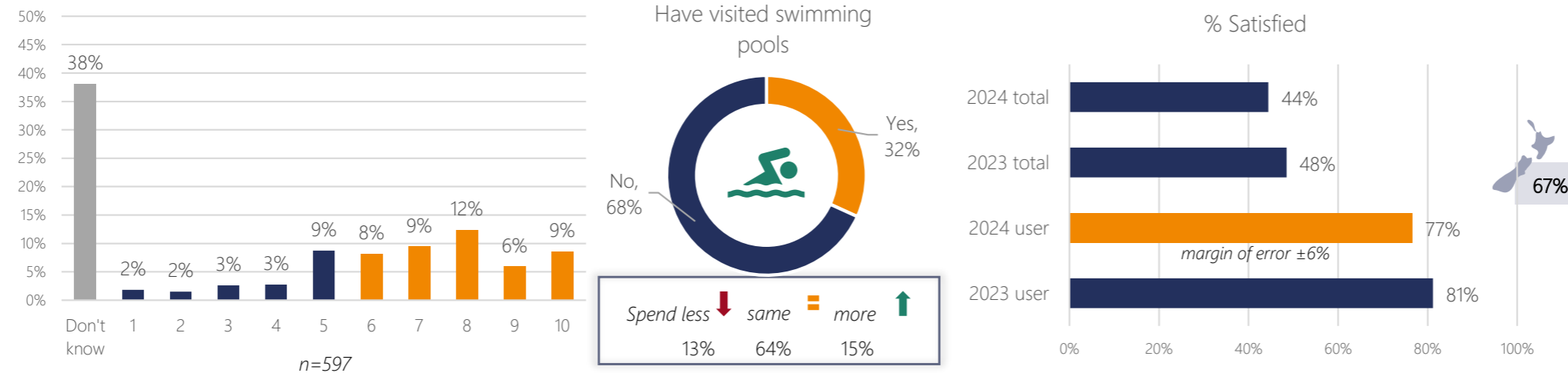


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

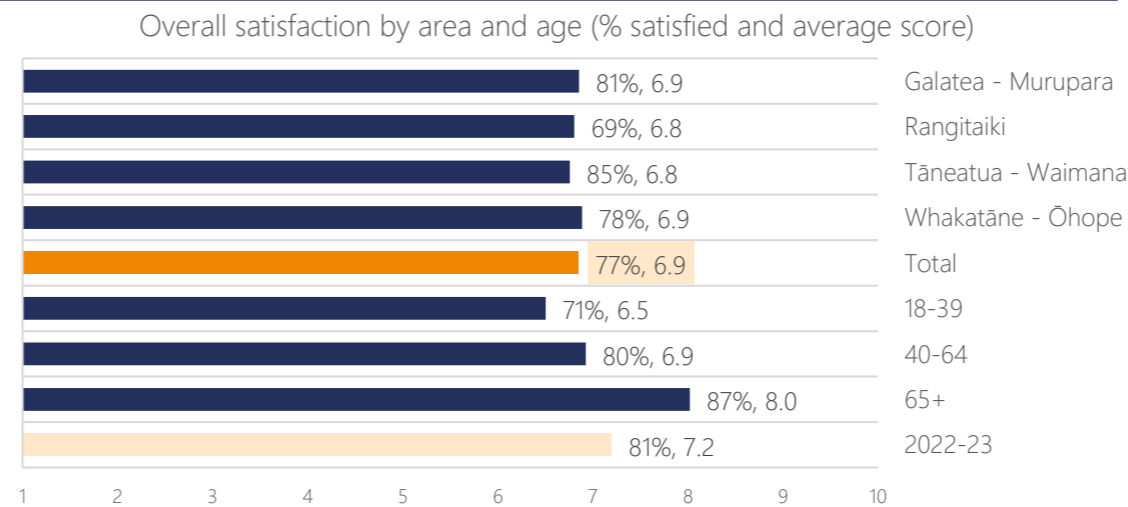
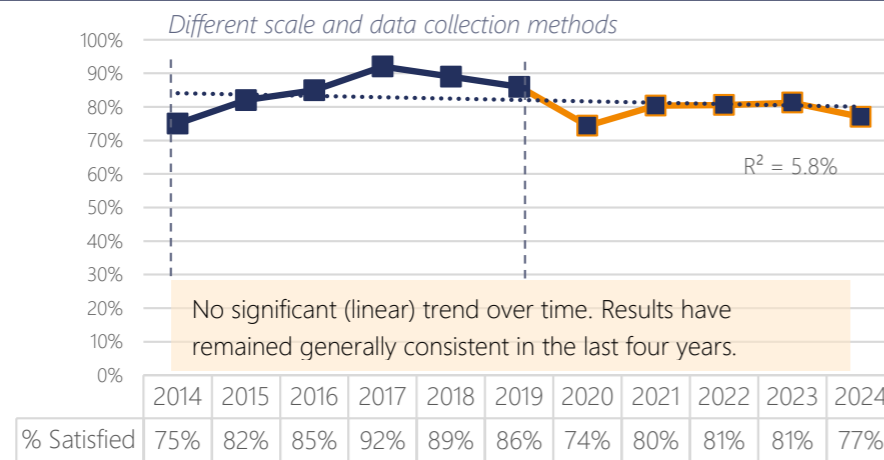
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Public swimming pools

LTP MEASURE



- 1-in-3 residents (32%) reported visiting a swimming pool in the District in 2024 (up from 26% in 2023 and 25% in 2022).
- Satisfaction among swimming pool users (77%) in 2024 remained high and similar to 2023 (81%) – and 10%-points above the national benchmark.
- In 2024, satisfaction was lower among 18-39 year olds; but higher for males than for females (7.3 vs 6.5 on average).
- Overall, 64% of residents preferred seeing the same level of Council funds spent on public swimming pools (65% in 2023).

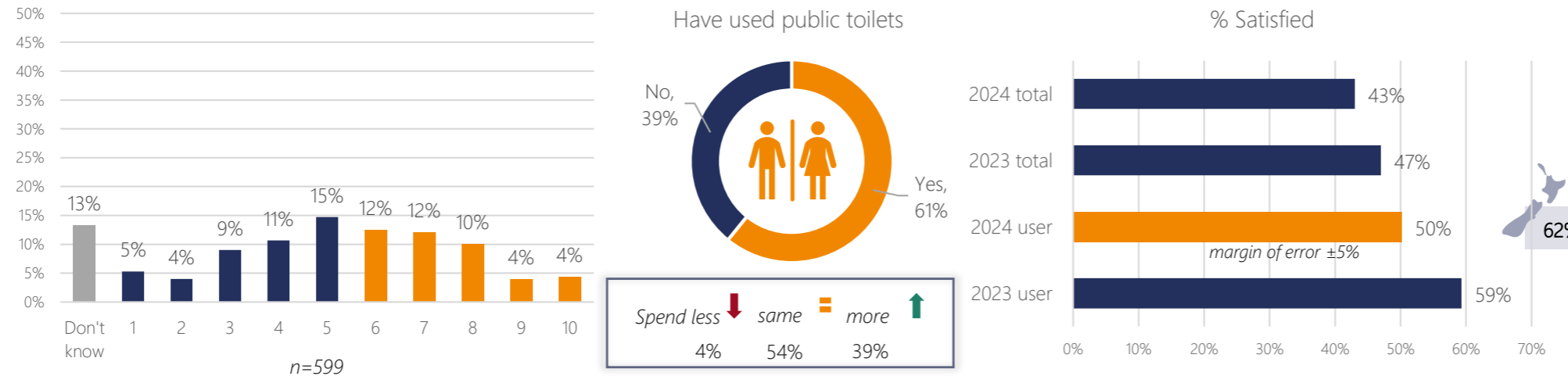


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

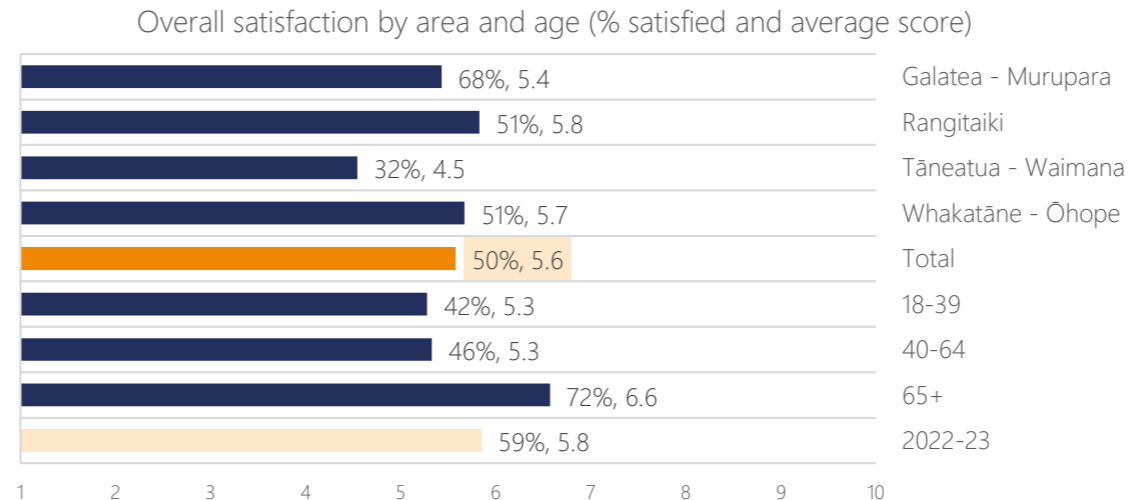
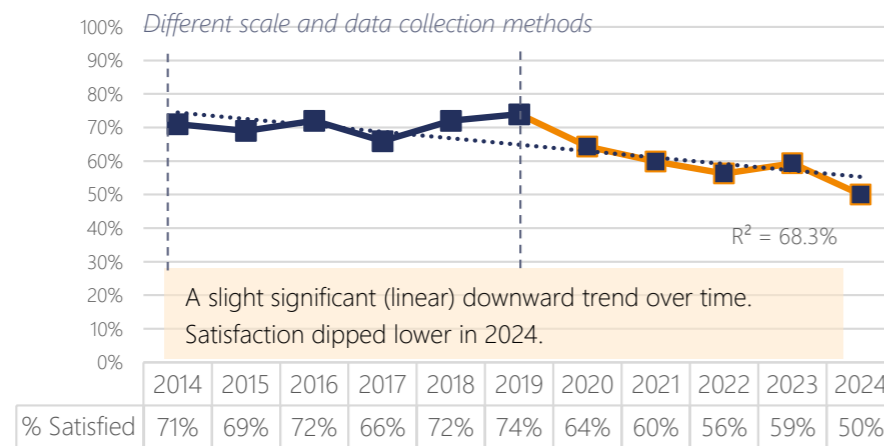
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Public toilets



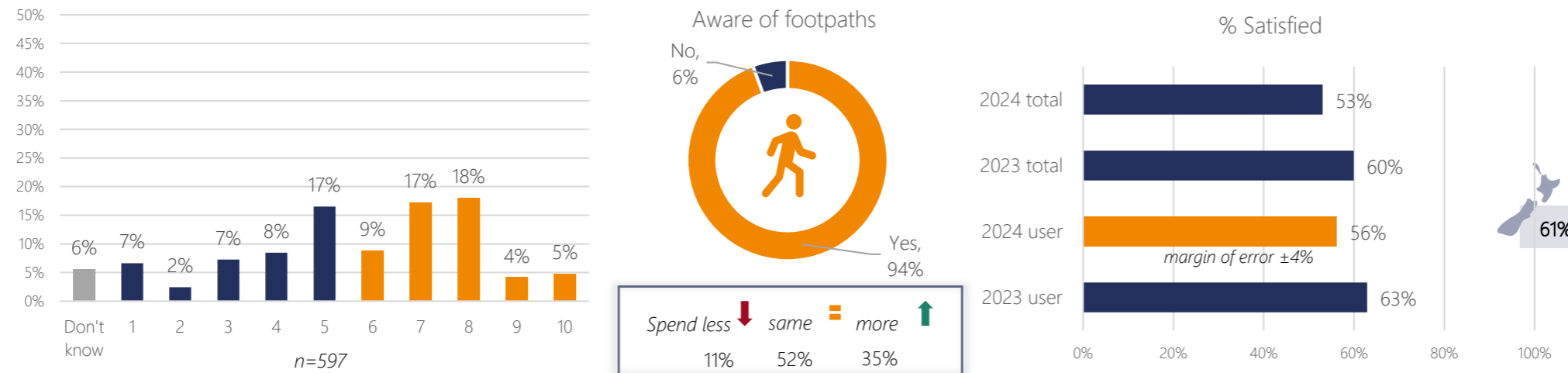
- In 2024, 6-in-10 residents (61%) reported using a public toilet in the District (similar to 59% in 2023).
- Among public toilet users, the percentage satisfied decreased in 2024 (50%) compared to 2023 (59%), although average ratings were consistent (5.6 vs 5.8) overall.
- Respondents aged under 65 remained less satisfied with toilet facilities compared to older respondents. Satisfaction was particularly low in Tāneatua-Waimana.
- Toilets remained a very high priority for more (39%) Council spending in 2024 (2nd highest spending priority, similar to previous years).



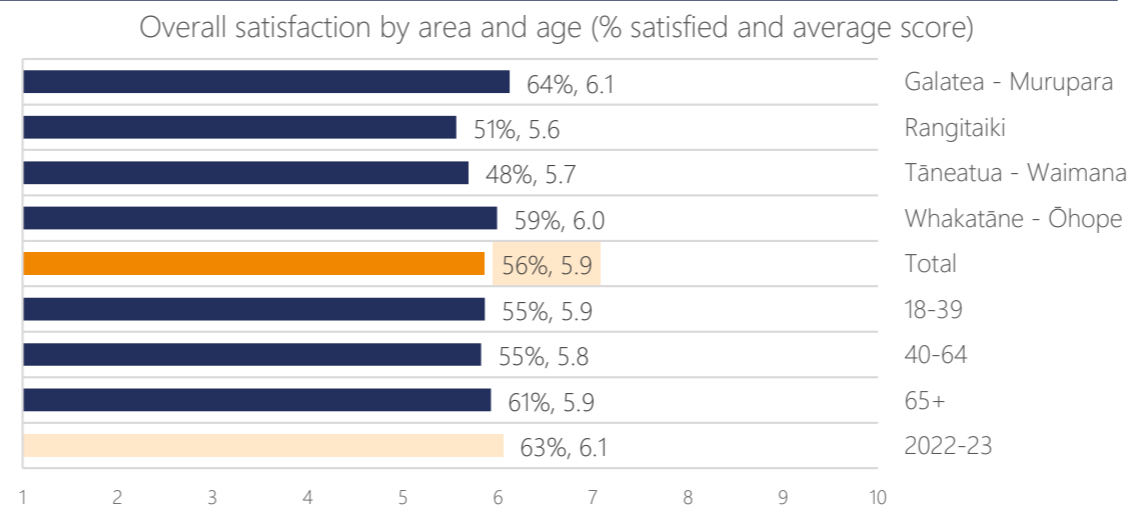
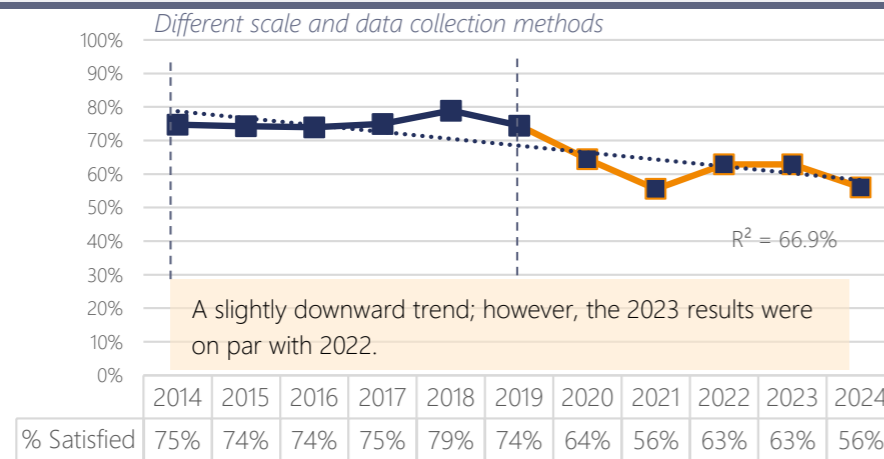
7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Footpaths

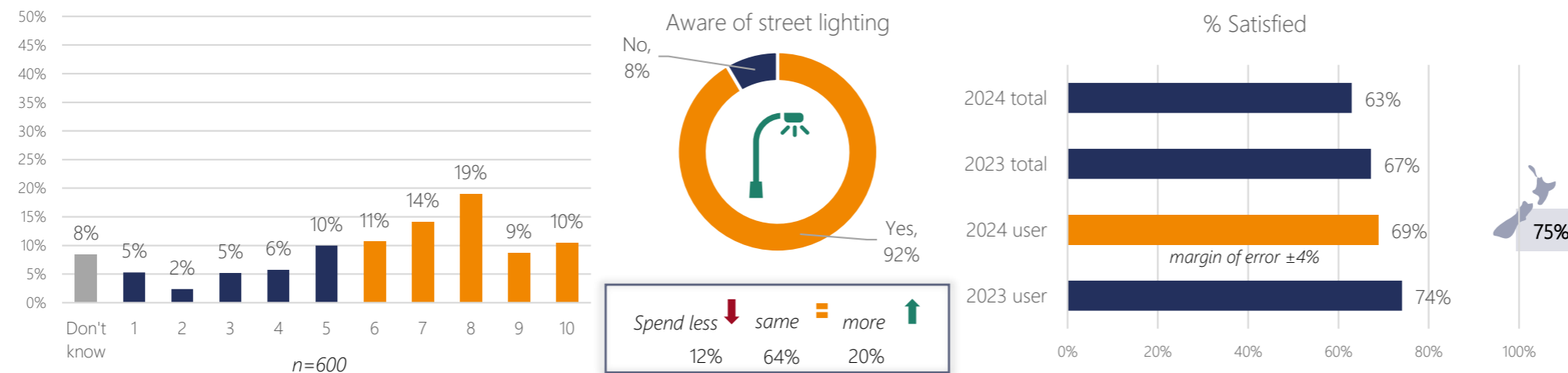


- The majority of residents (56%) who provided a rating were satisfied with footpaths in the District in 2024 (average rating 5.9 out of 10).
- Satisfaction with footpaths in 2024 decreased compared to 2023 and 2022, although returning to the level measured in 2021.
- There were no statistically significant differences by key subgroups in 2024.
- While 52% of residents preferred seeing the same level of Council funds spent on footpaths (also 52% in 2023), this was still a high priority for more (35%) funding.

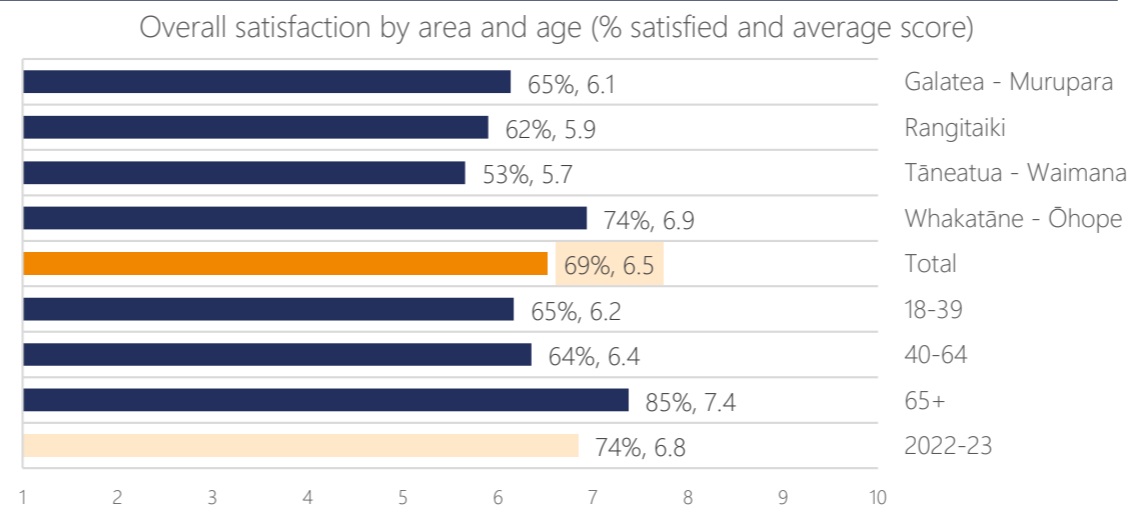
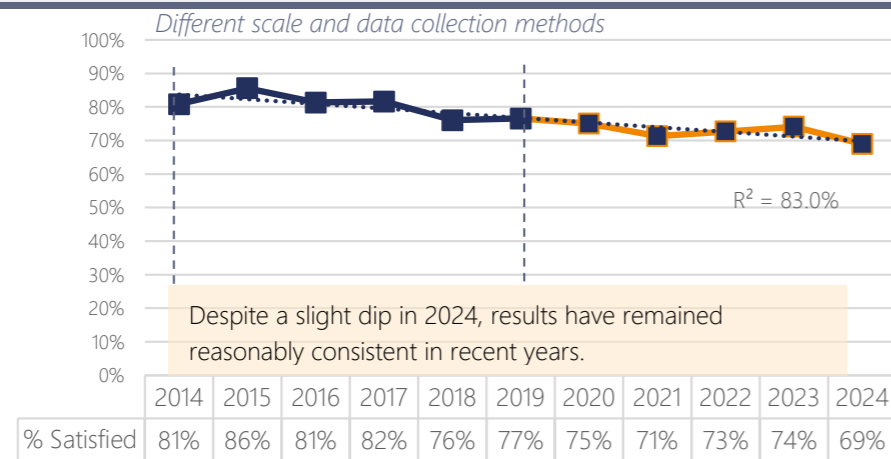


SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Street lighting



- Satisfaction with street lighting was slightly lower in 2024 than the previous two years (74% in 2023, 73% in 2022) but similar to the 2021 result (71%).
- There were notable variations apparent across the District, with satisfaction lower in Tāneatua-Waimana (53%, down from 79% in 2023), and remaining higher in Whakatāne - Ōhope (74%, similar to 2023).
- Clear age differences were measured, with satisfaction highest among 65+ year olds (85%, similar to 2023). Satisfaction was lower among 40-64 year olds in 2024 (64%) than in 2023 (74%).
- Overall, 64% of residents preferred seeing the same level of Council funds spent on street lighting (similar to 63% in 2023).

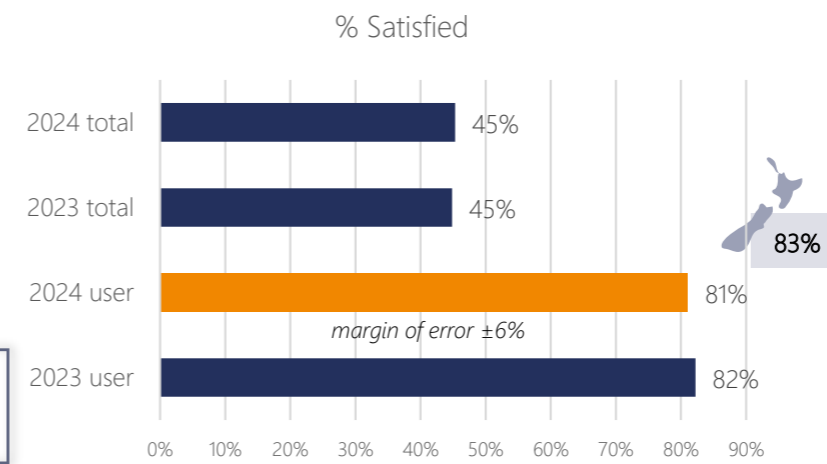
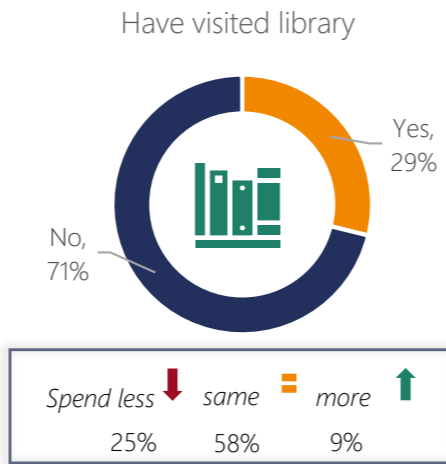
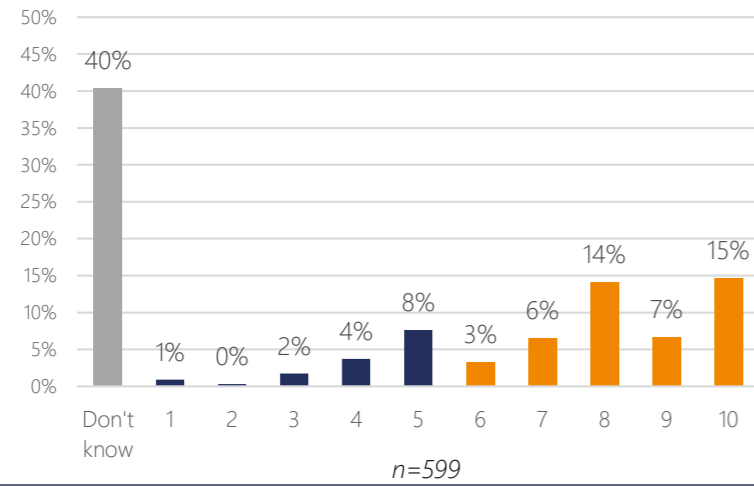


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

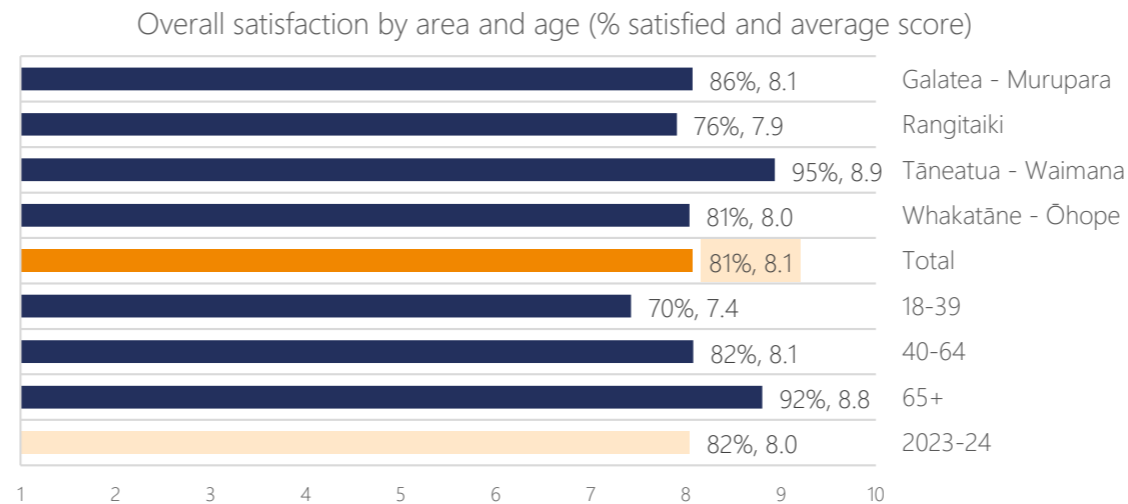
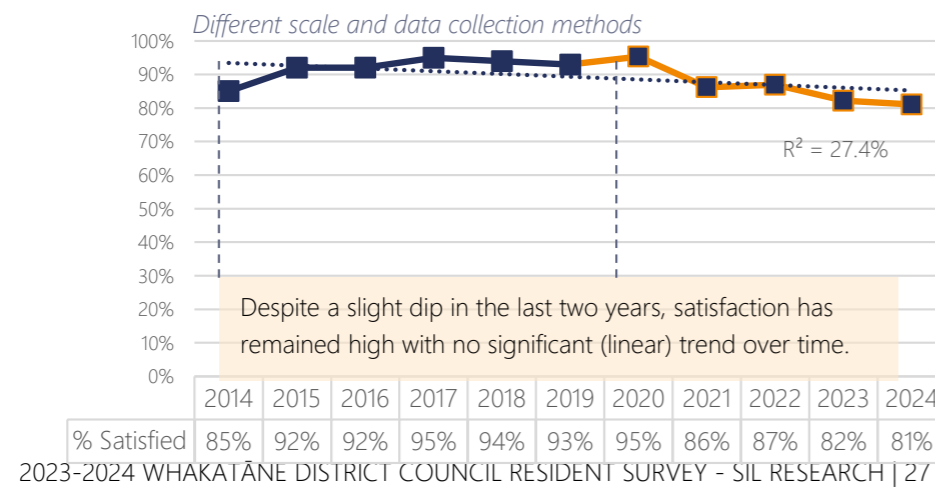
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Libraries in the District



- In 2024, almost 1-in-3 respondents (29%) reported visiting District libraries (up from 25% in 2023).
- Among library users, satisfaction remained on par (81%) compared to 2023 (82%).
- Satisfaction was particularly high in Tāneatua-Waimana despite no significant differences by community board areas.
- However, there was a consistent difference measured between the youngest and oldest resident segments. Satisfaction was also higher for females (8.3) than males (7.6).
- Overall, two-thirds of residents (58%) preferred seeing the same level of Council funds spent on public libraries (64% in 2023); with the 2nd-strongest call for less spending across all measured services.

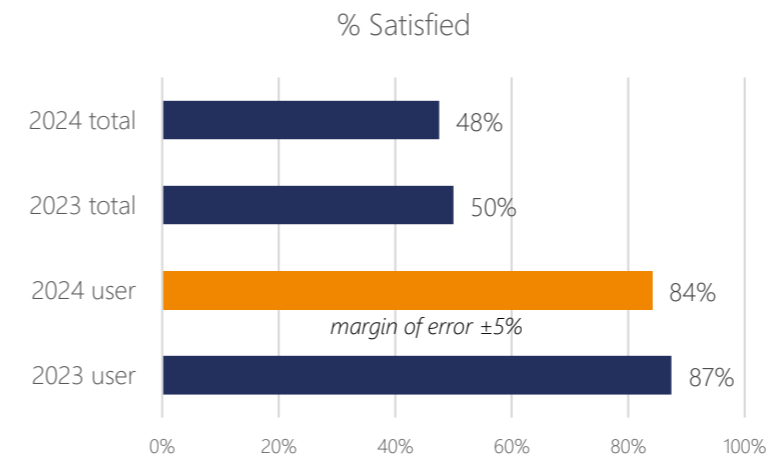
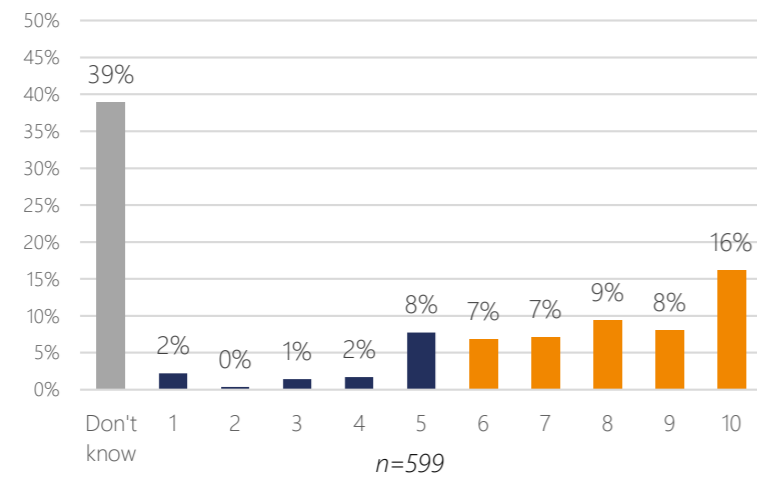


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

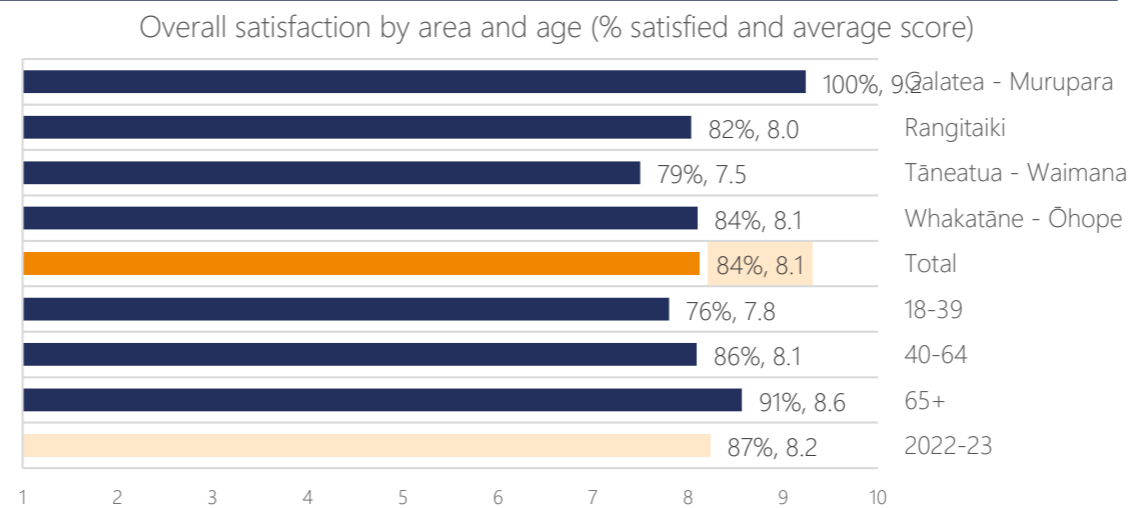
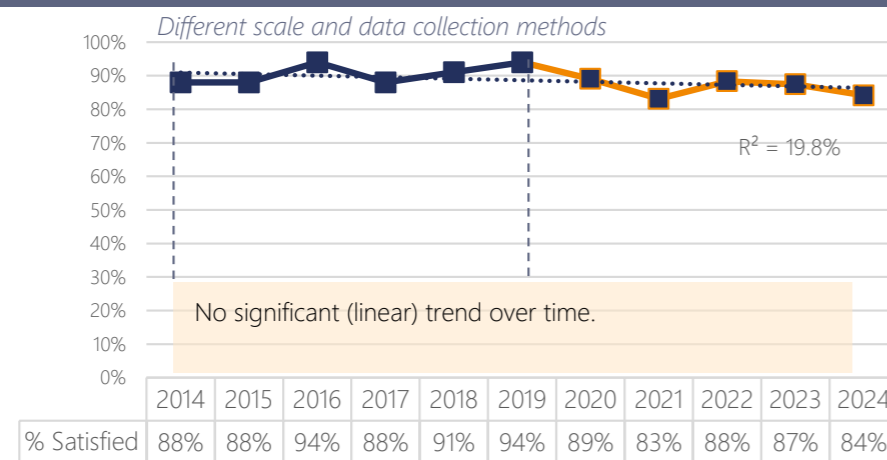
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Te Kōputu a te Whanga a Toi - Whakatāne Library and Exhibition Centre



- 1-in-3 (31%) of residents in 2024 reported visiting the Whakatāne Exhibition Centre (up slightly from 29% in 2023).
- In line with low visitation levels, knowledge about the Centre remained low with 2-in-5 residents not able to provide a rating (e.g. 'Don't know' responses).
- However, satisfaction remained high among Exhibition Centre visitors in 2024 (84%).
- Despite few differences between resident subgroups in 2024, females (8.5) typically provided higher ratings than males (7.6) on average.

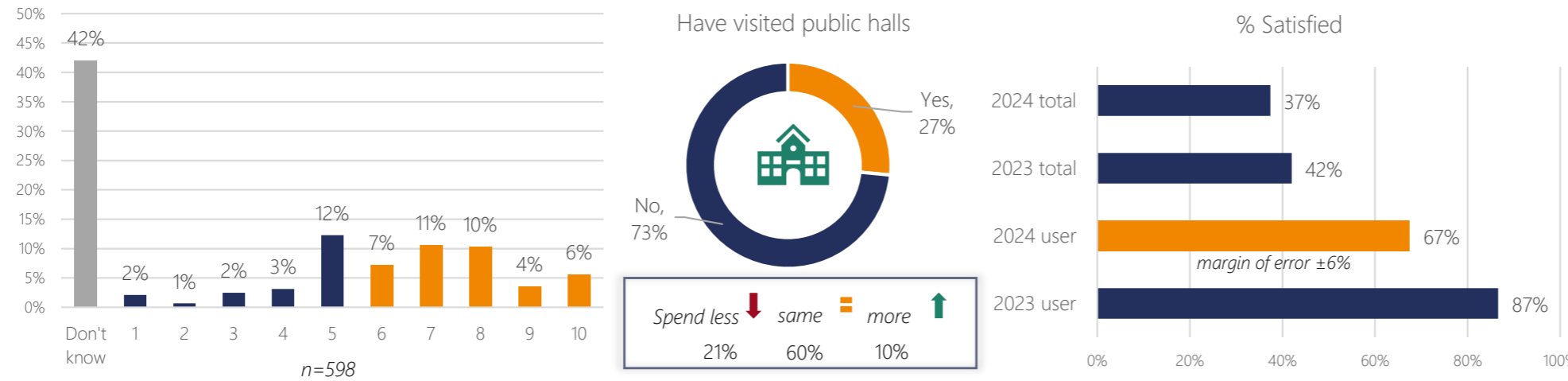


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

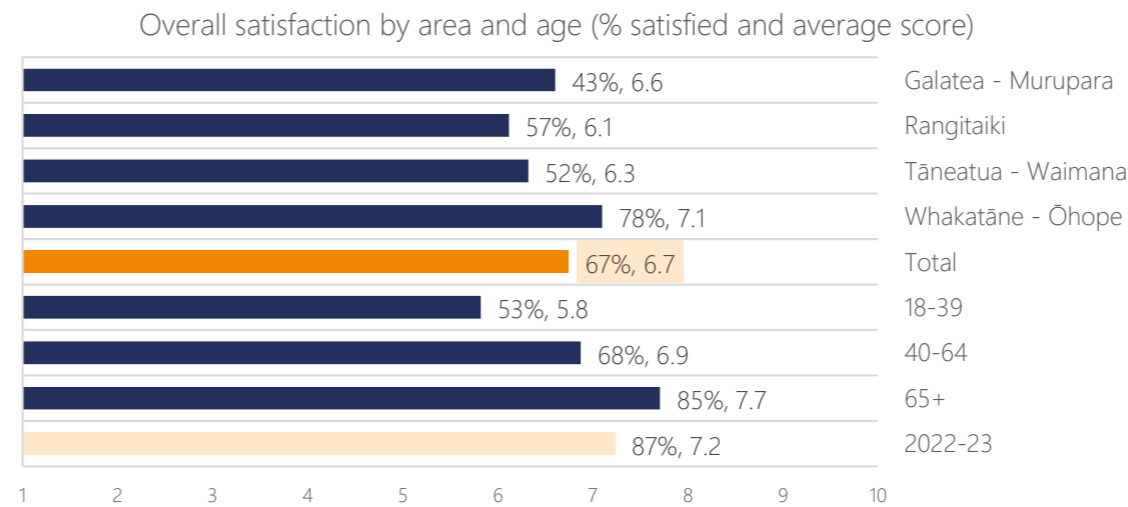
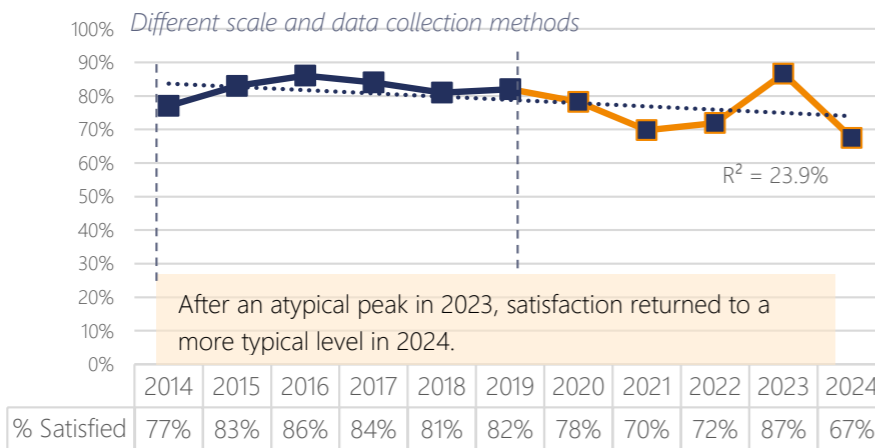
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Public halls



- As with the Whakatāne Exhibition Centre, many residents could not rate public halls in the district. However, visitation of halls increased in 2024 (27%) compared to 2023 (20%).
- Despite low usage, satisfaction among public hall users (67%) dropped in 2024 from the atypical peak of 2023 – albeit returning closer to levels observed in 2021-22.
- The fall in satisfaction was driven by younger residents, with satisfaction lower among both 18-39s (53% 2024 vs 66% 2023) and 40-64 year olds (68% 2024 vs 87% 2023).
- Despite this, halls were not a spending priority - 60% of residents preferred seeing the same level of Council funds spent on public halls, and 1-in-5 wanted less spending on these facilities.



7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

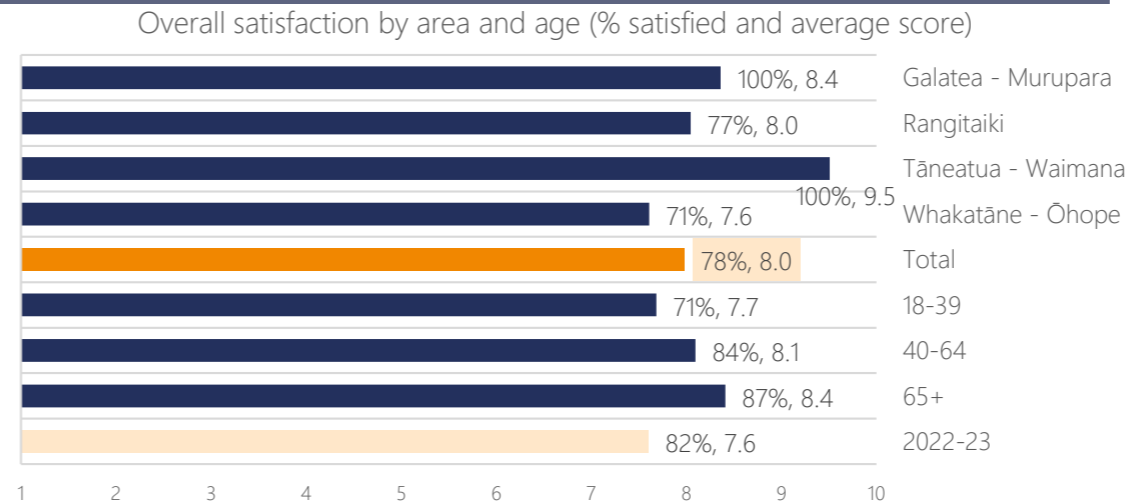
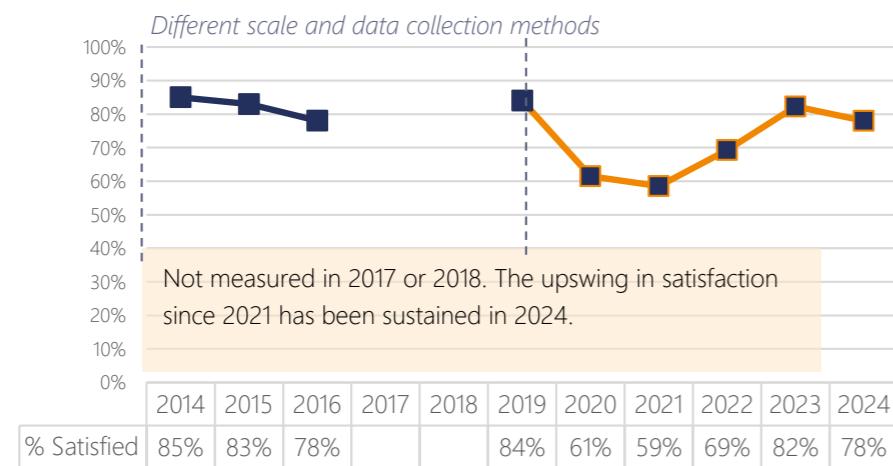
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Te Whare Taonga o Taketake - Whakatāne Museum and Research Centre



- In 2024, just 1-in-10 residents (11%) reported visiting the Whakatāne Museum and Research Centre (similar to recent years) - again reflected in low levels of knowledge (61% providing 'Don't know' ratings).
- However, visitors report very high satisfaction at 78% in 2024, consistent with 2023 and remaining above results from 2020-22.
- There were no statistically significant differences by resident subgroups in 2024. Observed differences particularly between community board areas were subject to small subsample sizes.

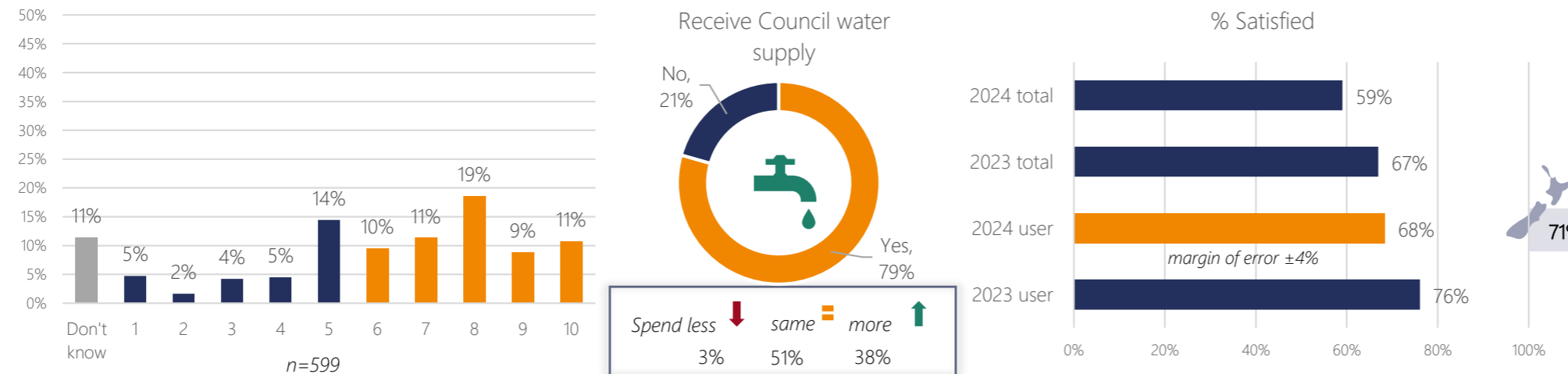


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

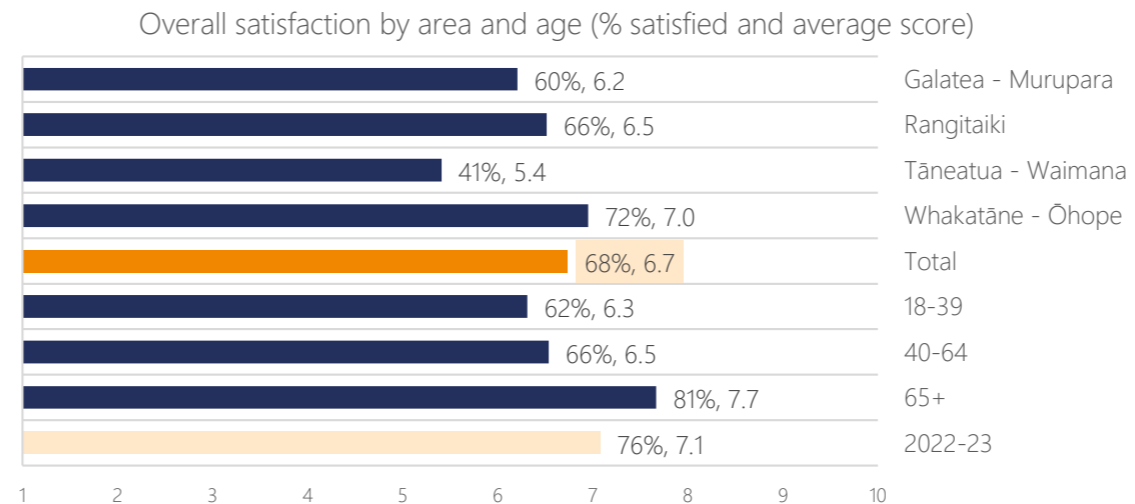
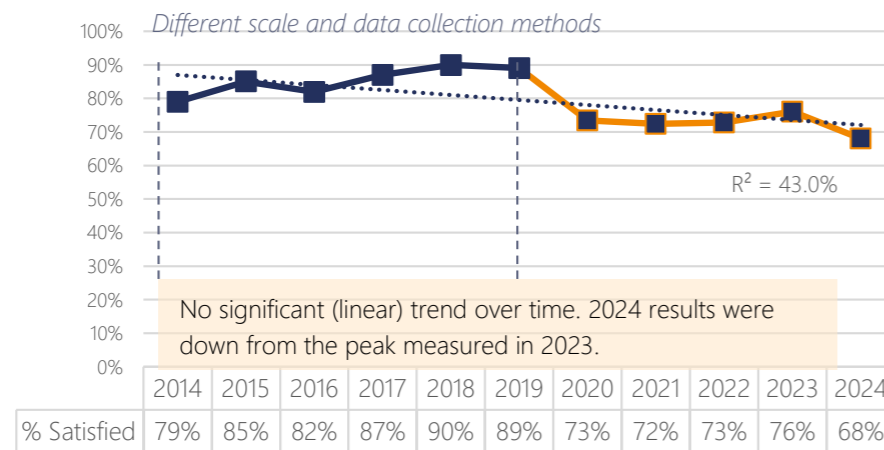
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Water supply



- In 2024, 4-in-5 residents (79%) reported being connected to Council's water supply (similar to 78% in 2023).
- Of those residents on Council's water provision, 68% were satisfied with the supply overall (6.7 average rating), although decreasing from the recent peak of 76% in 2023.
- Differences were apparent between areas, with satisfaction notably lower in Tāneatua-Waimana. Residents aged under 65 also remained less satisfied with Council's water supply than did older residents.
- Reflecting the importance of this service, water supply was the 3rd-most preferred service for more Council funding (38%, similar to 35% in 2023).

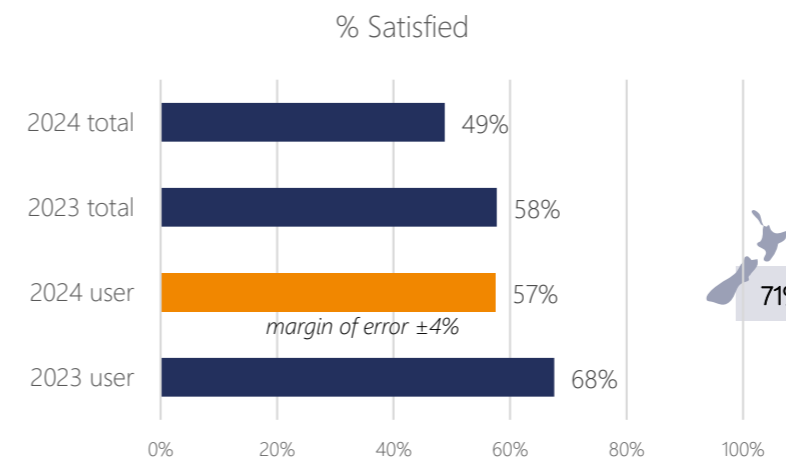
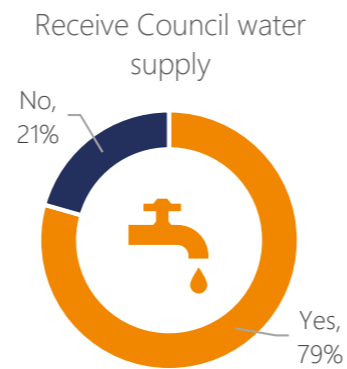
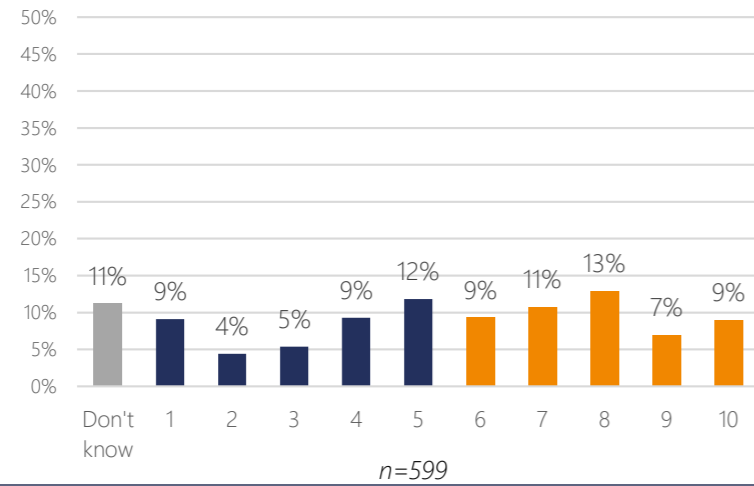


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

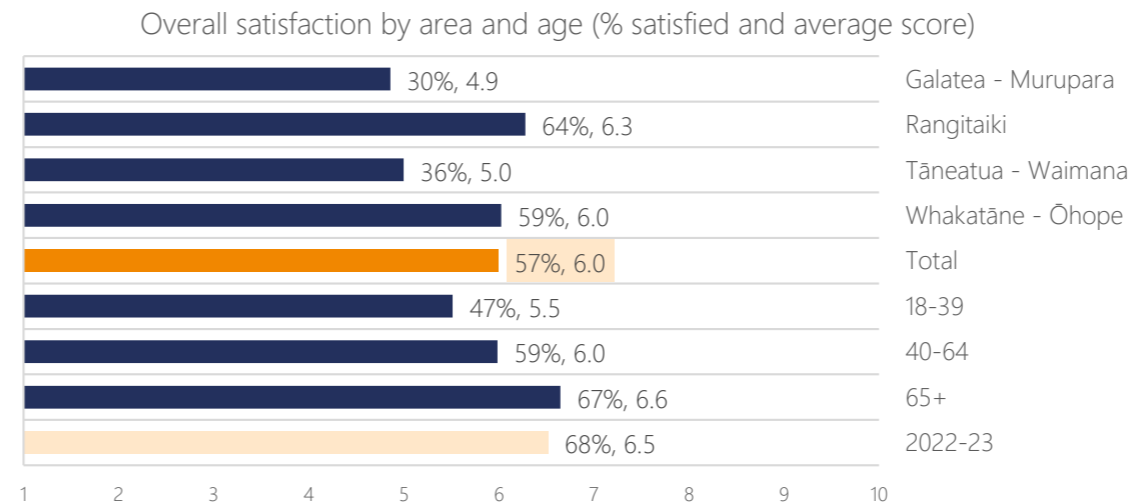
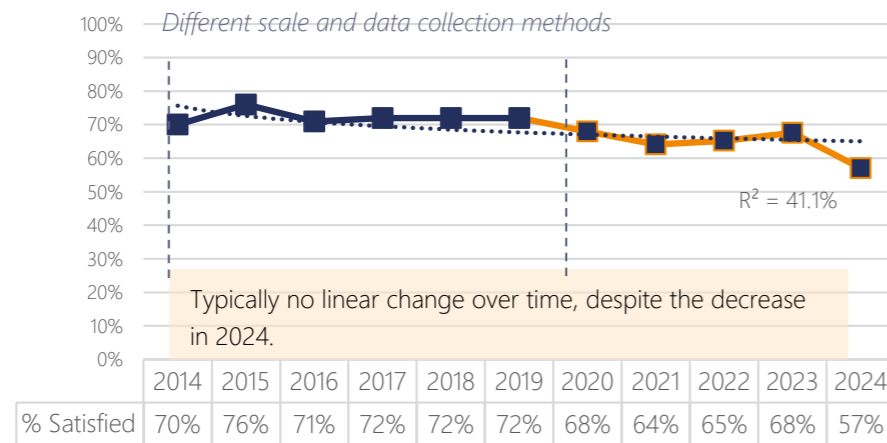
LTP MEASURE
(aggregated)

Quality of drinking water



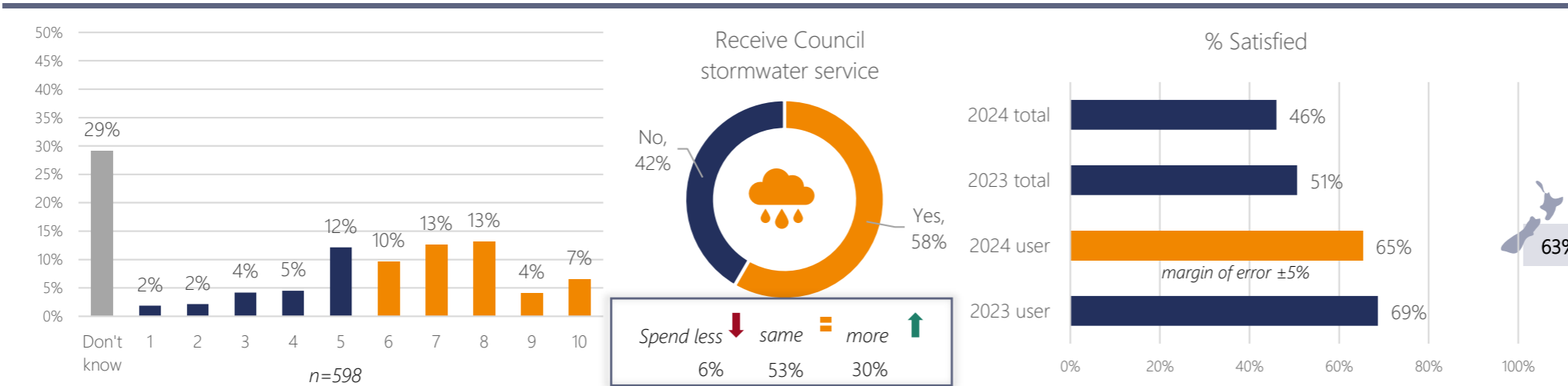
- 57% of residents on Council's water supply were satisfied with quality of their drinking water (6.0 average rating), a decrease from 68% in 2023.

- Quality concerns were particularly noted from Galatea-Murupara and Tāneatua-Waimana residents.
- Residents aged under 65 remained less satisfied with water quality in addition to the water supply generally.

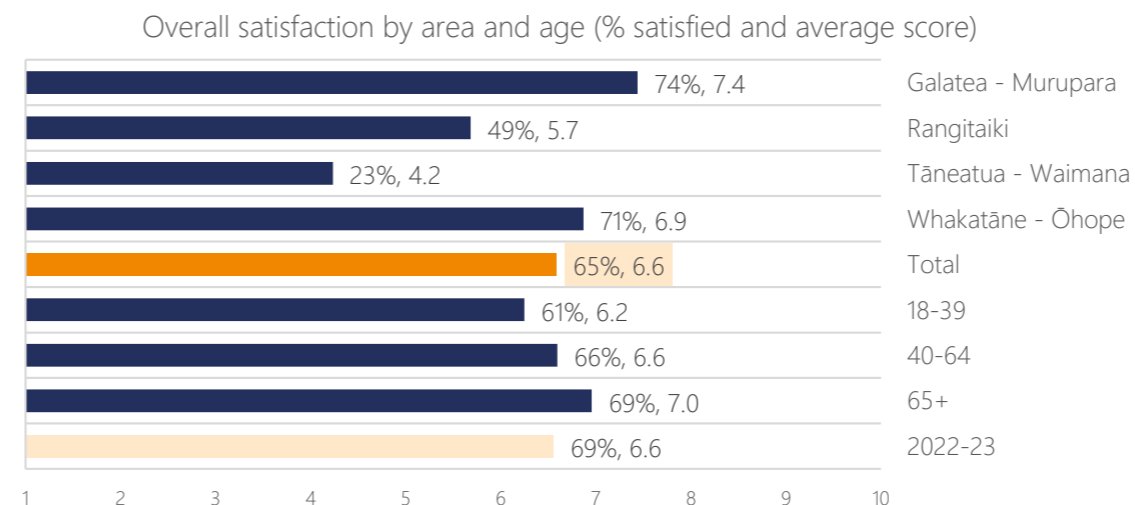
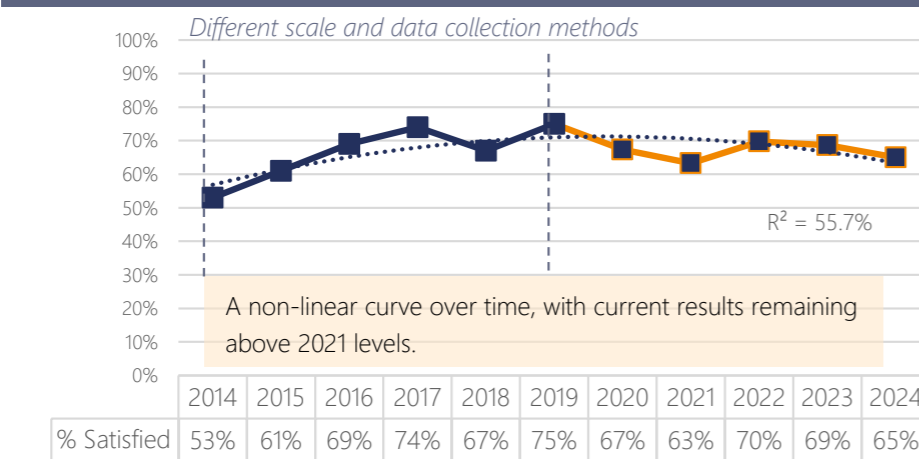


SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Stormwater service



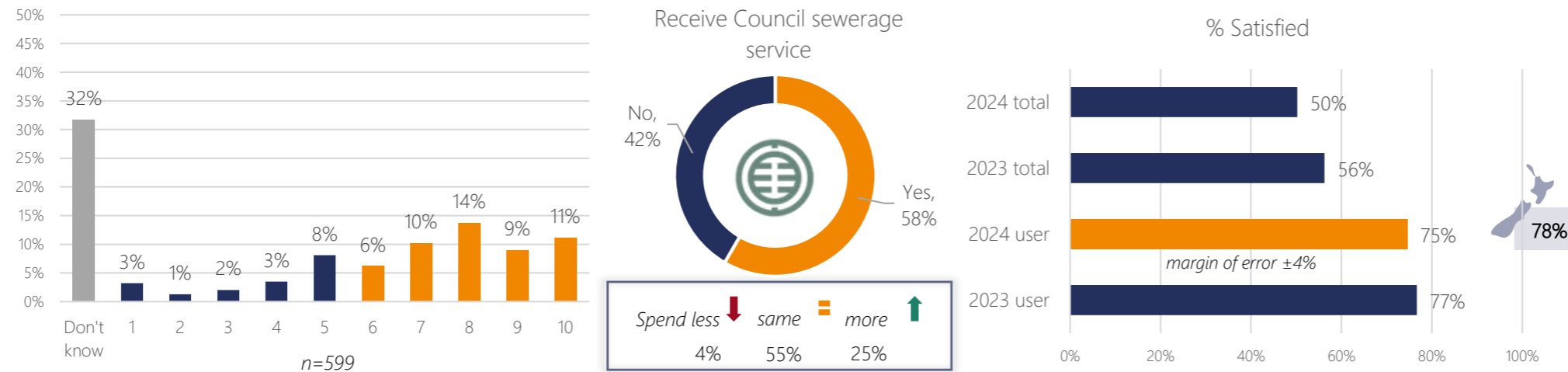
- 3-in-5 (58%) of surveyed residents in 2024 were aware of being on Council's stormwater service network (similar to 62% in 2023 and 57% in 2022).
- Of these residents, 65% were satisfied with this service (6.6 average rating); no significant change since 2023 and on par with the national benchmark.
- Clear difference were noted by area, with satisfaction lower in Tāneatua-Waimana especially, and also in Rangitaiki in 2024.
- 1-in-3 respondents preferred more Council spending on stormwater (30%), although lower than 39% in 2023 (following the substantial rain events in that year).



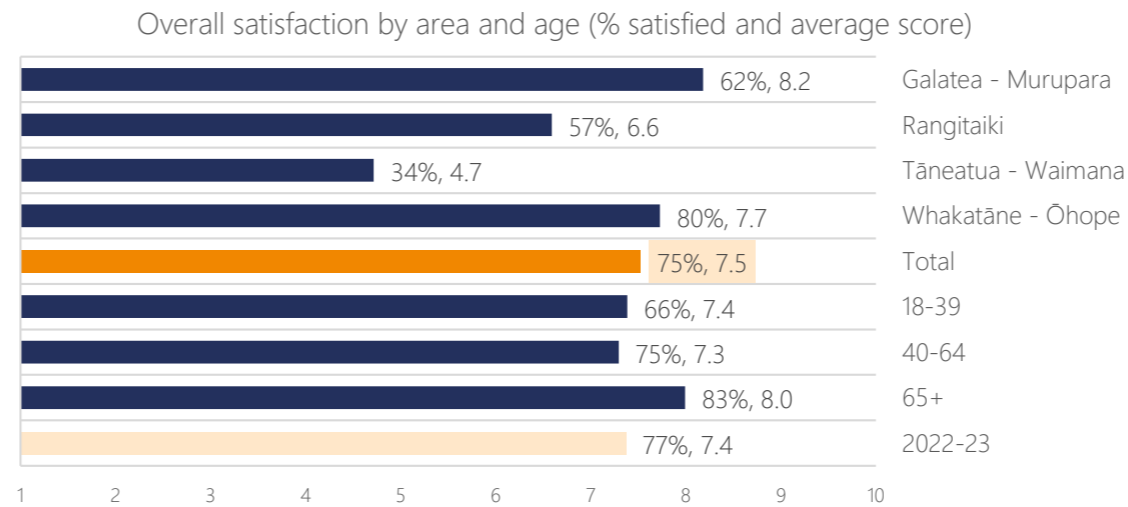
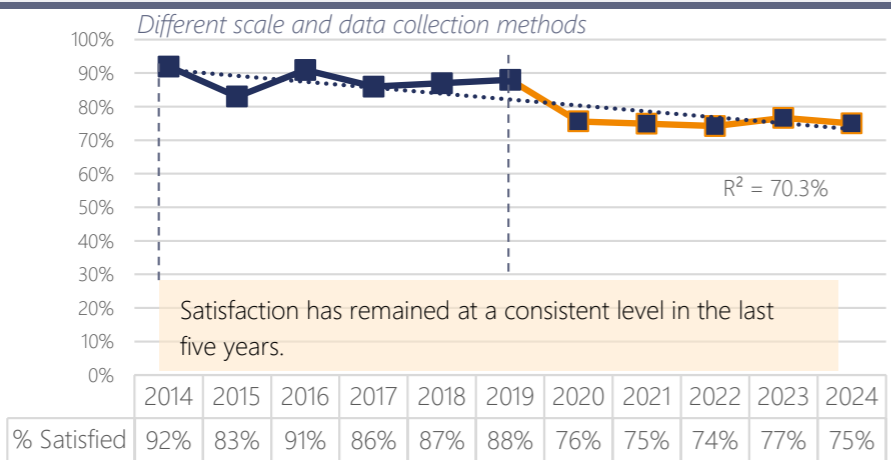
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Sewerage system

LTP MEASURE



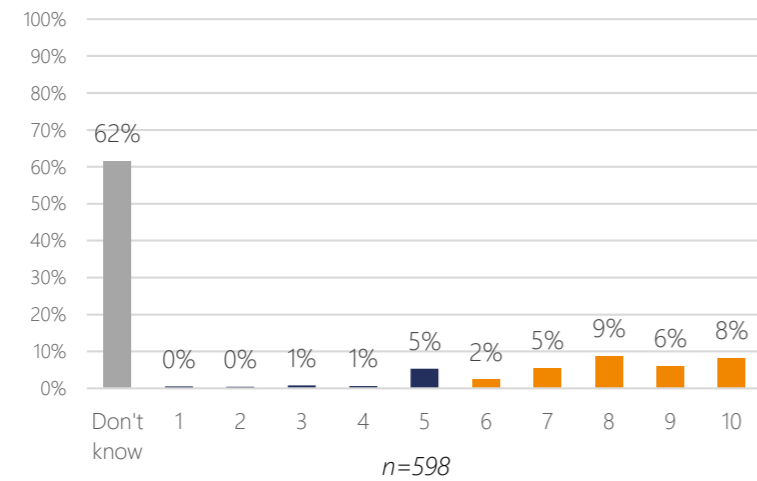
- As for stormwater, 3-in-5 (58%) of surveyed residents reported being connected to Council sewerage services in 2024.
- 75% of these residents were satisfied with the sewerage system (average rating 7.5); consistent with results observed over recent years.
- Satisfaction was notably lower in both Tāneatua-Waimana and Rangitaiki.
- Residents aged under 65 remained less satisfied with Council's sewerage service on average compared to older respondents.
- Overall, 55% of residents preferred seeing the same level of Council funds spent on the sewerage system, with 1-in-4 wanting more spending on this service (similar to 2023).



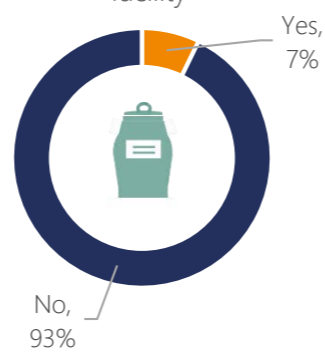
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

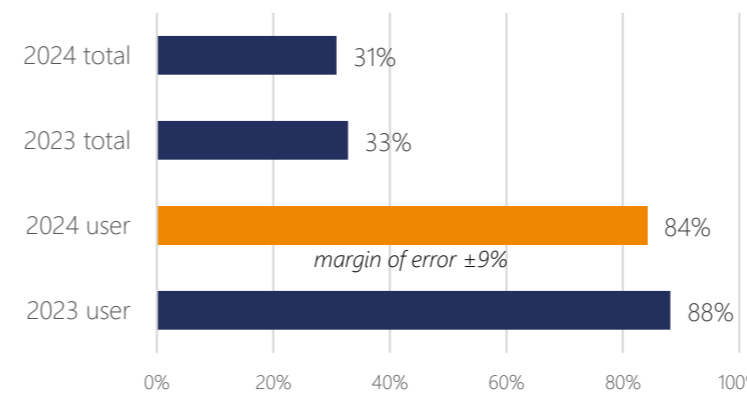
Whakatāne crematorium facility



Have visited crematorium facility

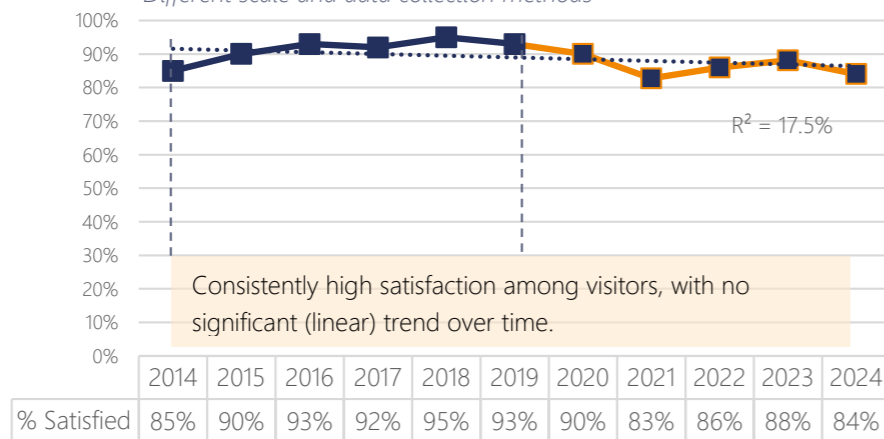


% Satisfied

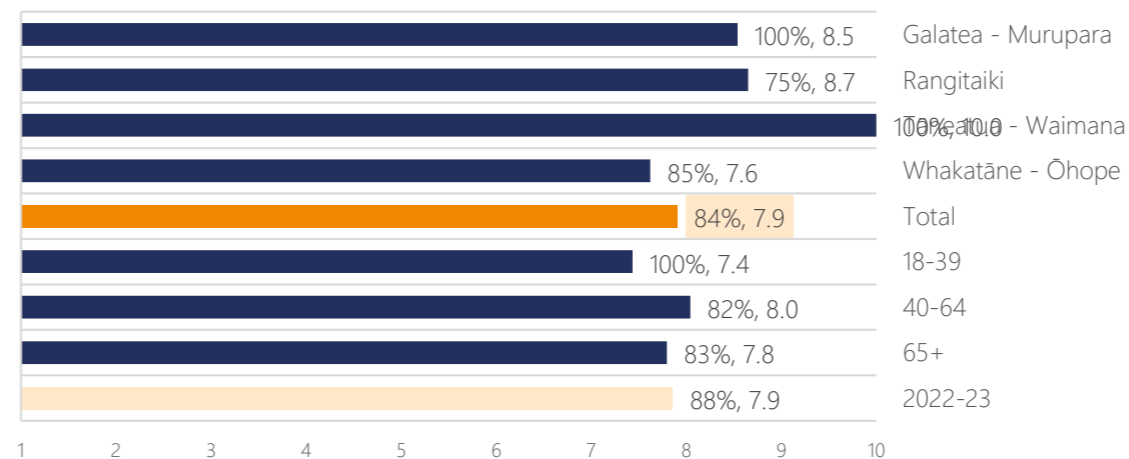


- Visitation of the Whakatāne crematorium remains historically low, with just 7% of residents visiting this facility in 2024 (similar to recent years). Knowledge of the facility therefore is also low, with 62% of residents unfamiliar with it in 2024 (60% in 2023).
- Nevertheless, satisfaction among visitors remained very high in 2024 (84%, average rating 7.9), with no significant differences over time.
- Due to the low sample of visitors to this facility and high margins of error, there were no significant differences between residents' demographic groups.

Different scale and data collection methods



Overall satisfaction by area and age (% satisfied and average score)

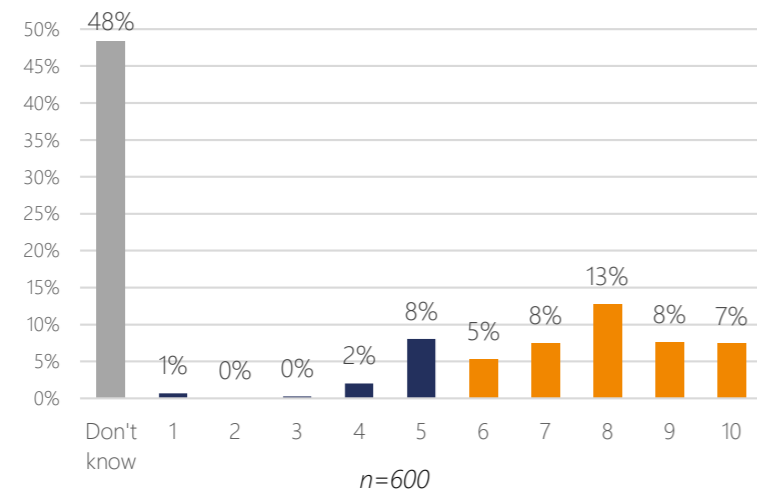


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

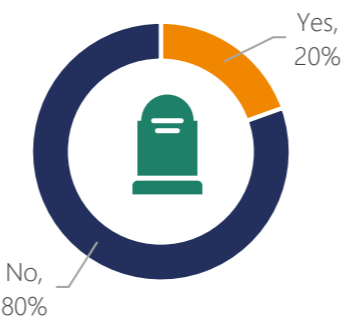
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

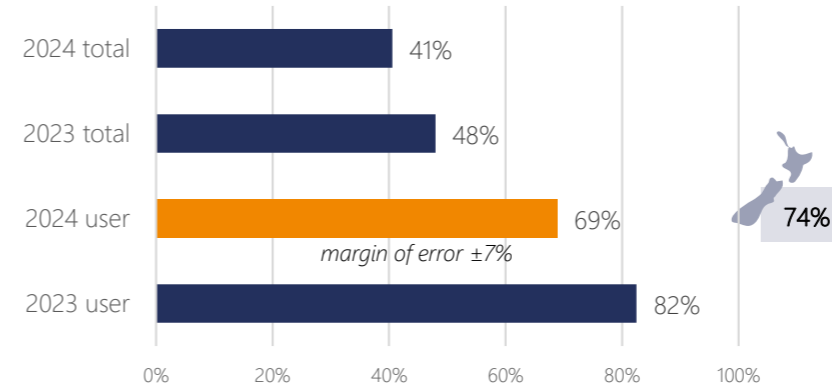
Cemeteries overall



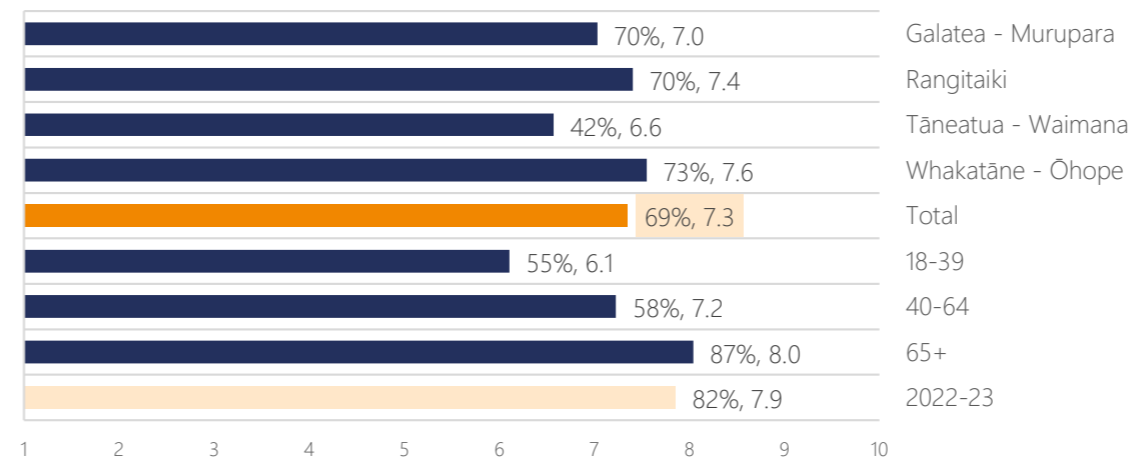
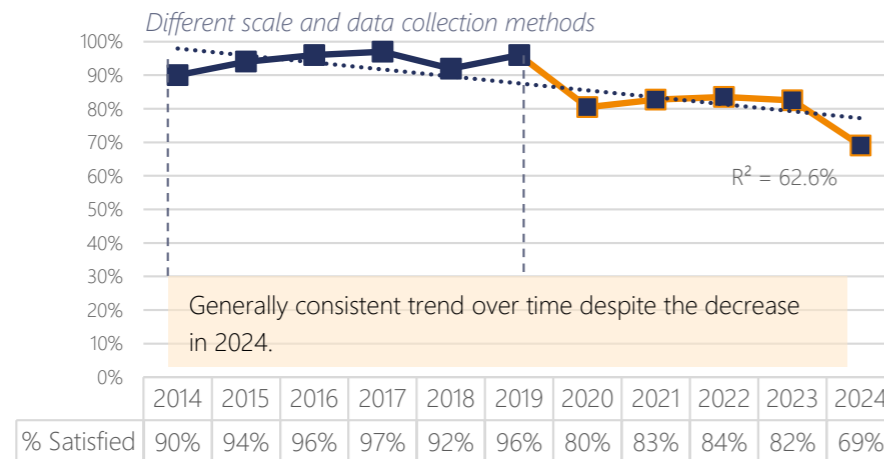
Have visited cemeteries



% Satisfied



- Visits to cemeteries remained low in 2024, with 1-in-5 residents (20%) reporting this (similar to 2023).
- 69% of these residents were satisfied with cemeteries overall – although lower than in 2023.
- Residents aged under 65 were significantly less satisfied with cemeteries than older respondents, with satisfaction lower than 2023 for both 18-39s (55% vs 67% in 2023) and 40-64 year olds (58% vs 88% in 2023). Results are impacted by low subsample sizes.

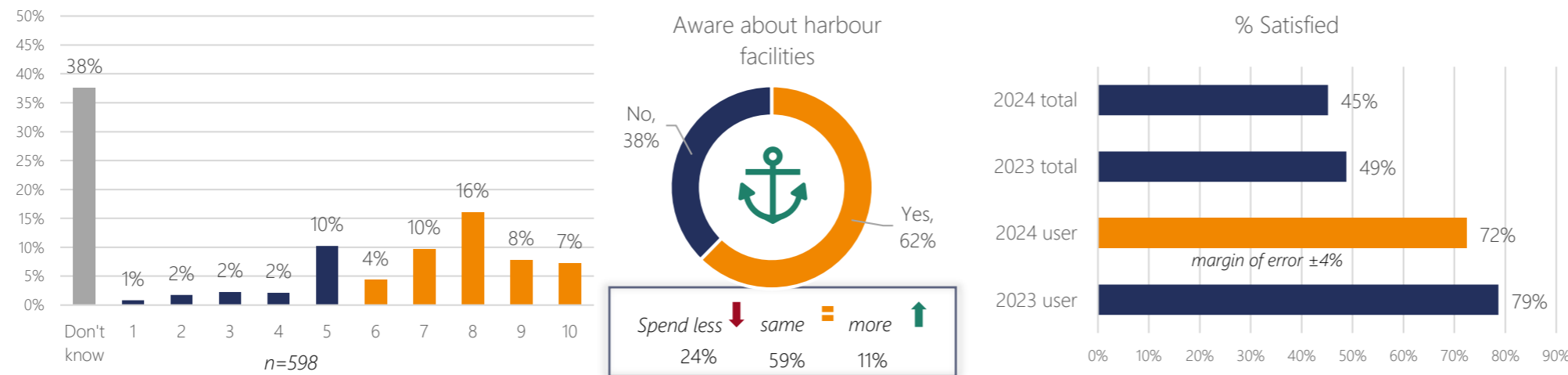


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

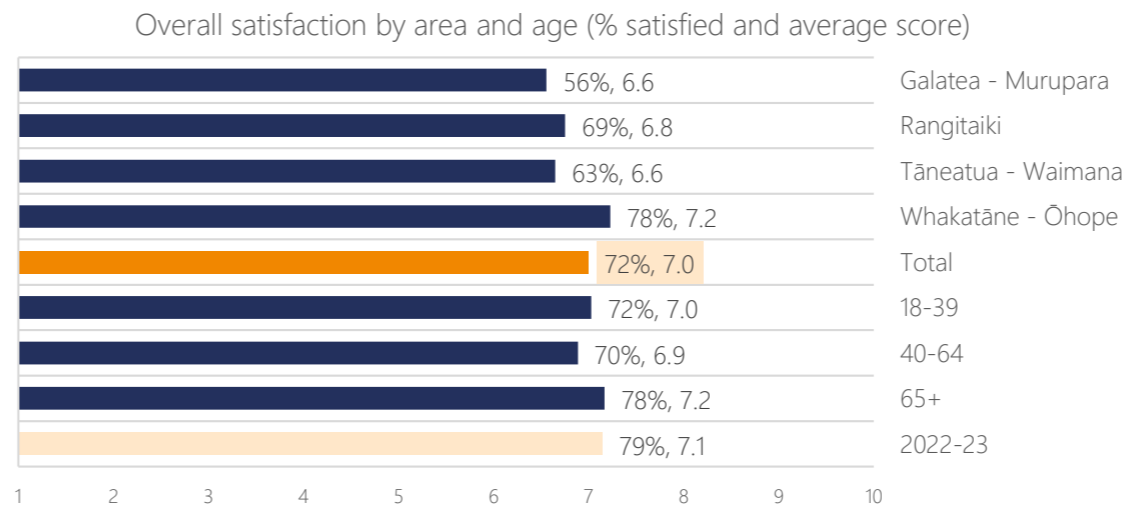
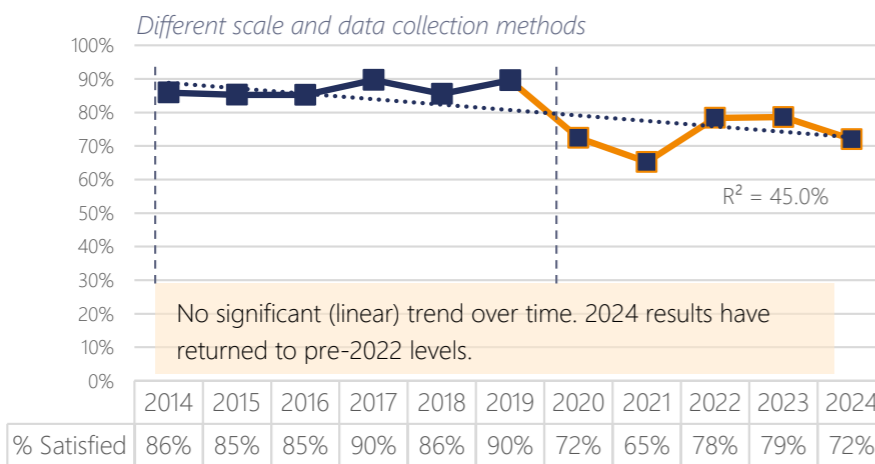
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

Boat ramps and wharf facilities (new wording in 2022).



- In 2024, 2-in-5 residents (38%) were unsure about boat ramps and wharf facilities in the District, with 62% providing a rating (similar to 2023).
- 72% of residents who were generally aware of these facilities were satisfied, a decrease from 2022-23 although above 2021 and similar to 2020 levels.
- In 2024, satisfaction was significantly lower among longer term residents living in the District for 10 years or more (6.8 on average).
- The shifting trend in spending priorities for boat ramps and wharf facilities observed in recent years continued in 2024, with 24% of respondents preferring less spending for this (20% in 2023), making it the 3rd most suggested service for lower spending.



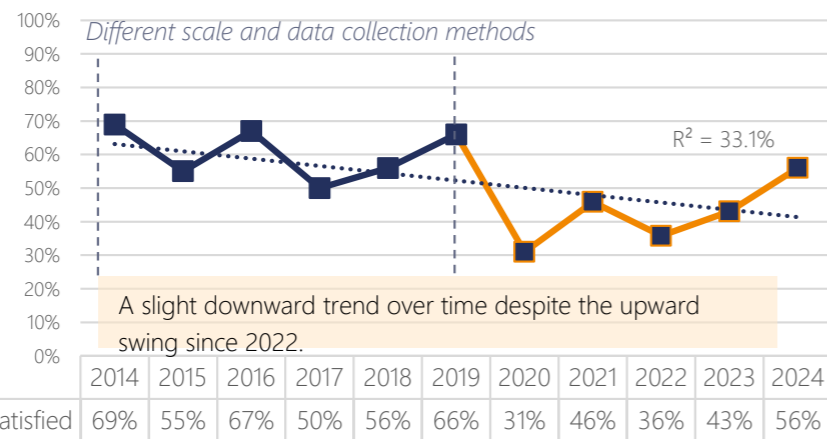
7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

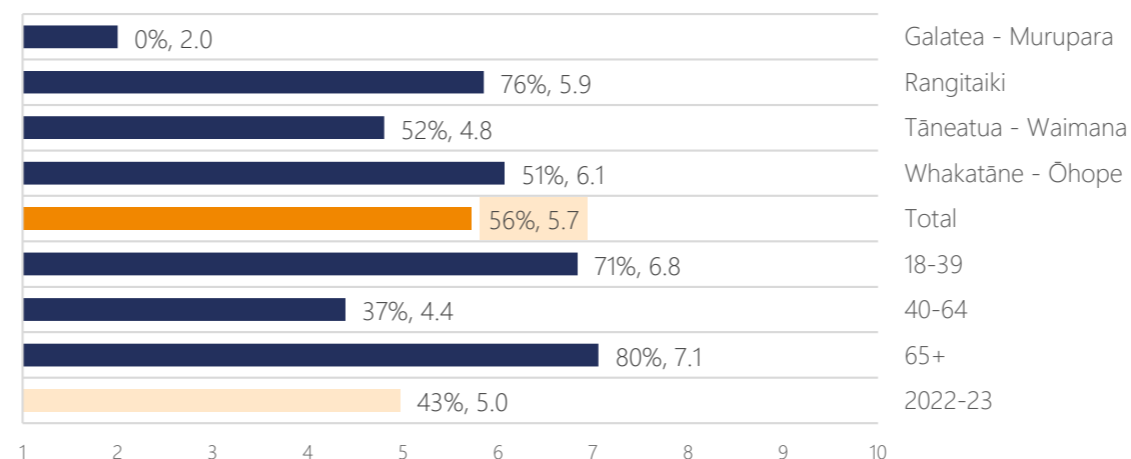
Noise control



- Historically, relatively few residents contact the Council about noise issues – a trend continued in 2024 (5%, similar to 2023).
- Satisfaction with noise control varies notably over time due to low sample sizes and greater margins of error reducing comparability. In 2024, satisfaction with this service continued an upward trend from 2023, reaching a five-year peak of 56%.
- Observed differences between community board areas were not significant due to noted low sample sizes. However, 40-64 year olds were significantly less satisfied with this service than residents in other age groups.
- Overall, 59% of residents preferred seeing the same level of Council funds spent on noise control. However, a higher percentage of residents were generally unsure about spending priorities for noise control (17%). These results were very similar to 2023.



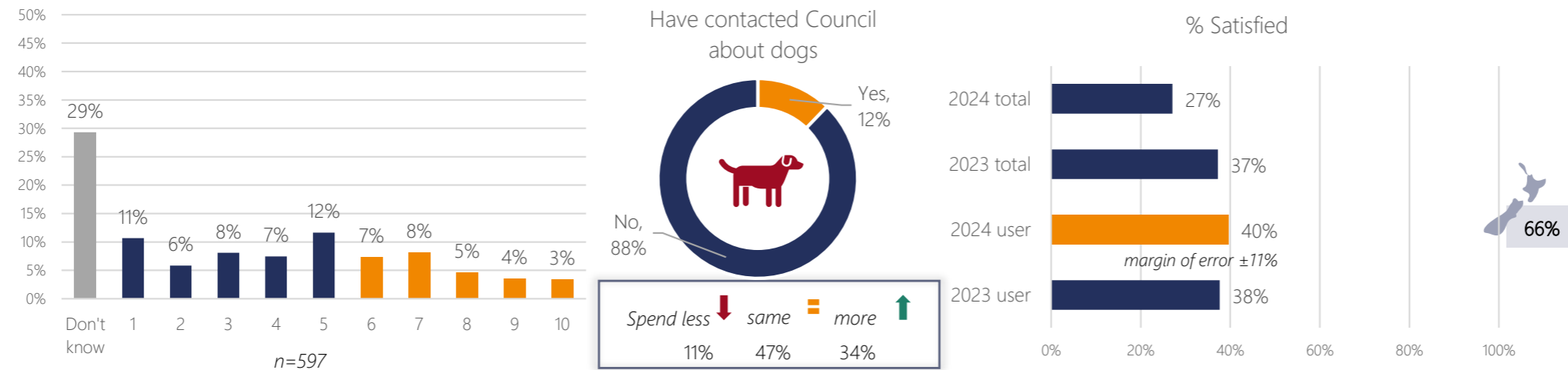
Overall satisfaction by area and age (% satisfied and average score)



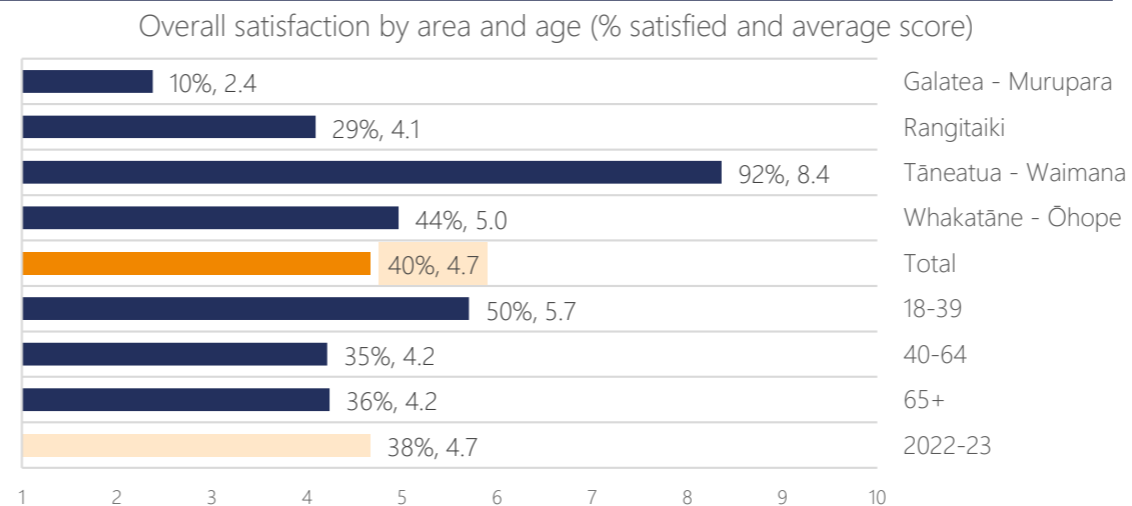
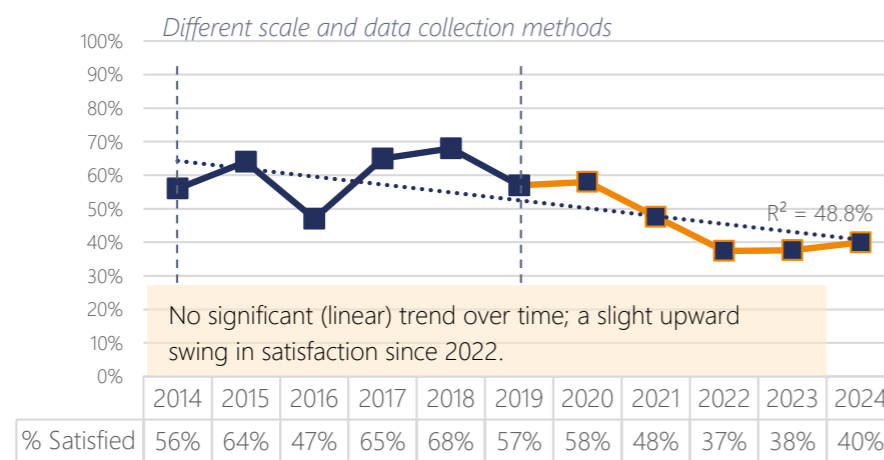
7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Dog control



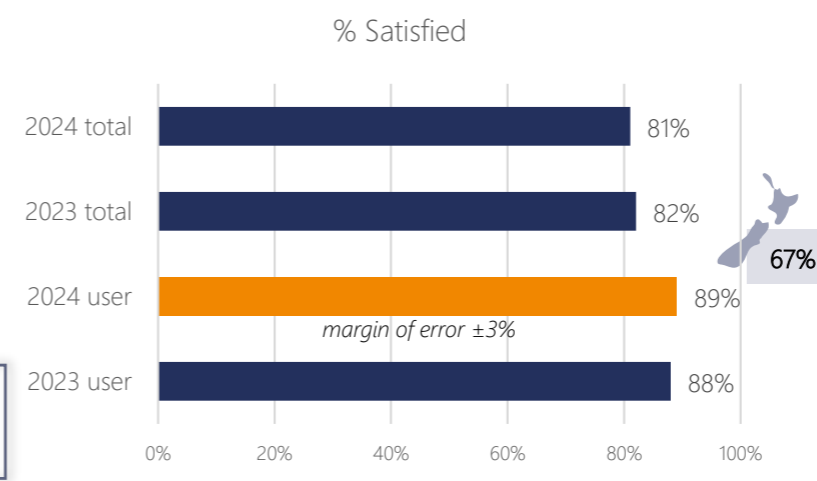
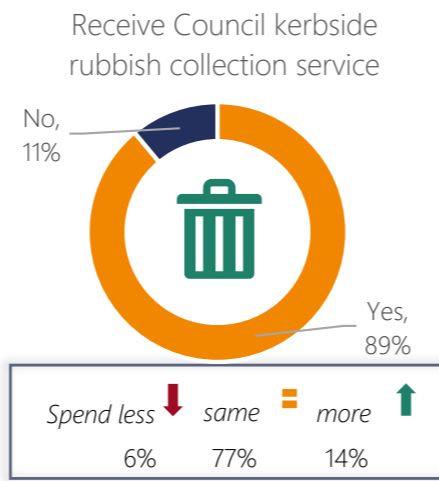
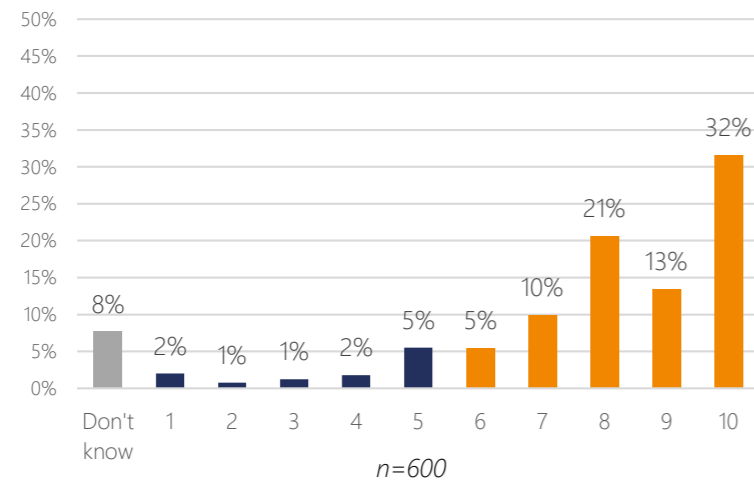
- In 2024, just 1-in-10 residents (12%) reported contacting the Council about dogs (similar to 2023), reflecting low knowledge about this service overall.
- Of residents making contact about dog control in 2024, satisfaction (40%) remained on par with the previous two years.
- Despite low sample sizes, residents in Tāneatua-Waimana were significantly more satisfied with this service than those in other areas.
- The desire for more spending on dog control continued to grow in 2024 (34%) from previous years (30% in 2023, 24% in 2022, 20% in 2021) - reinforced by unprompted comments raising concerns about this issue in the District.



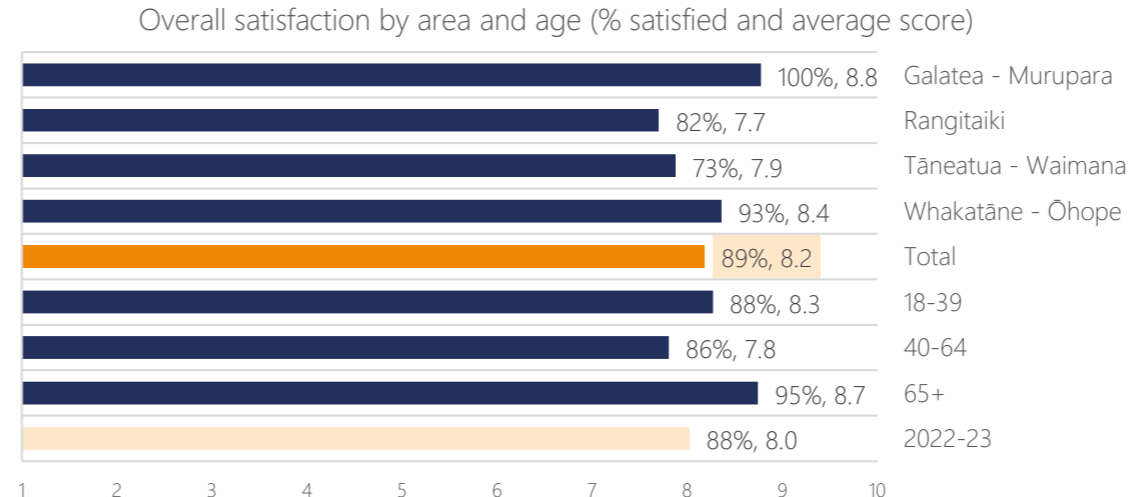
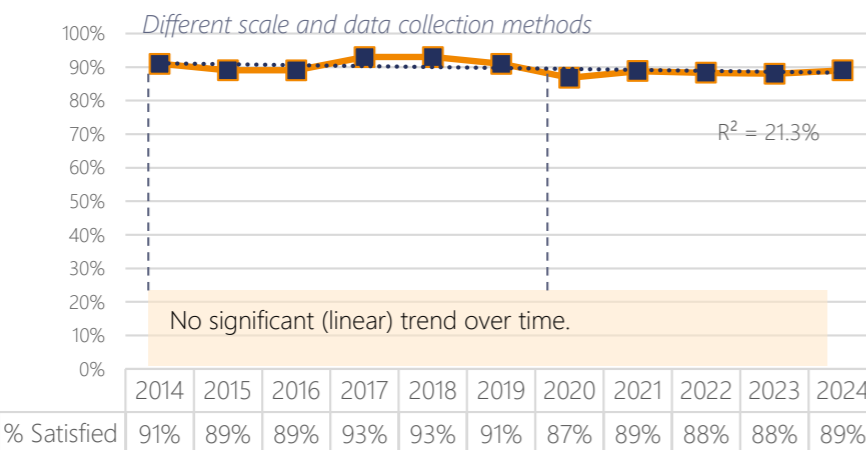
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Kerbside waste collection service

LTP MEASURE



- Most surveyed residents (89%) reported regular kerbside waste collection at their property in 2024 (consistent with previous years).
- As in 2023, this remained the highest-rated service in 2024 with very high satisfaction (89%, 8.2 average rating) - one of the most consistent results across all service measures over time.
- 1-in-3 (32%) respondents rated this service the maximum 10-out-of-10 (28% in 2023).
- Despite very high satisfaction across all subgroups, satisfaction with kerbside waste collection was lower in Tāneatua-Waimana (73%), and higher among 65+ year olds. Those living in the District for 10 years or more were less satisfied on average (7.9).
- High satisfaction was reflected in the high proportion (77%) of residents preferring the same level of spending for waste collection services (85% in 2023), indicating that the current service was seen as adequate.

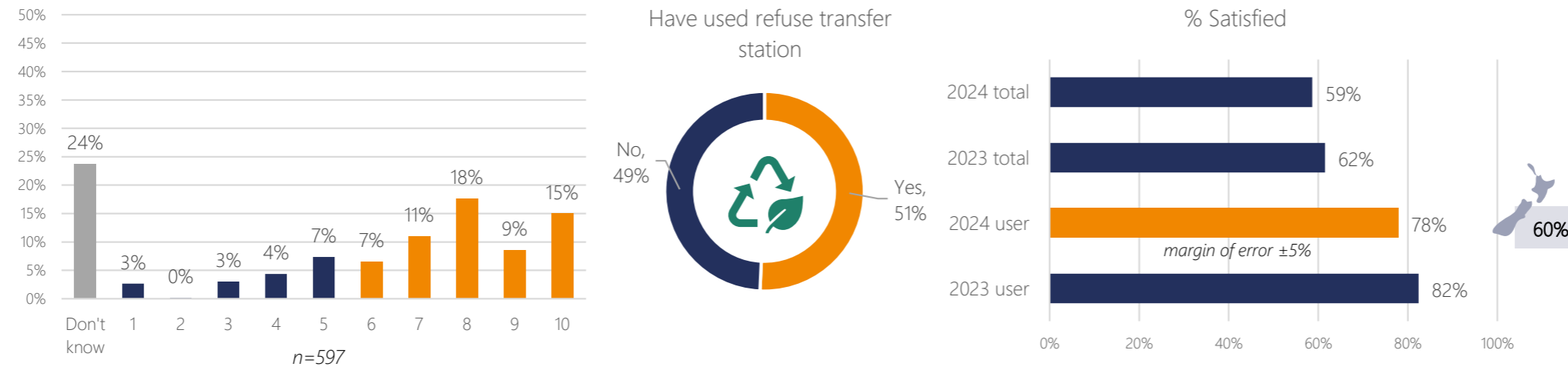


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

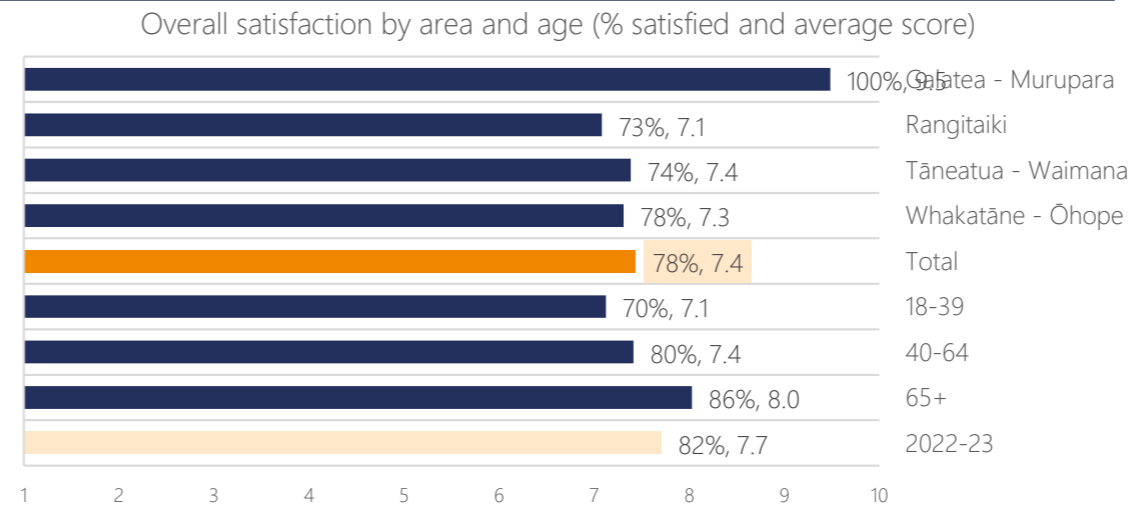
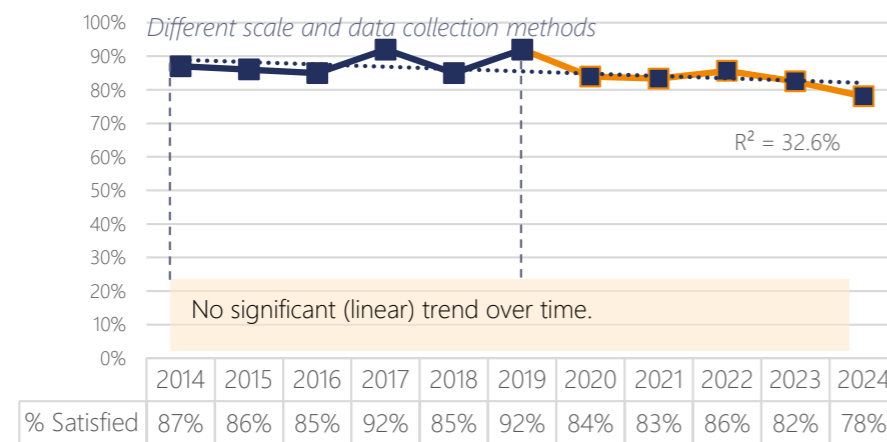
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Refuse transfer station facilities

LTP MEASURE



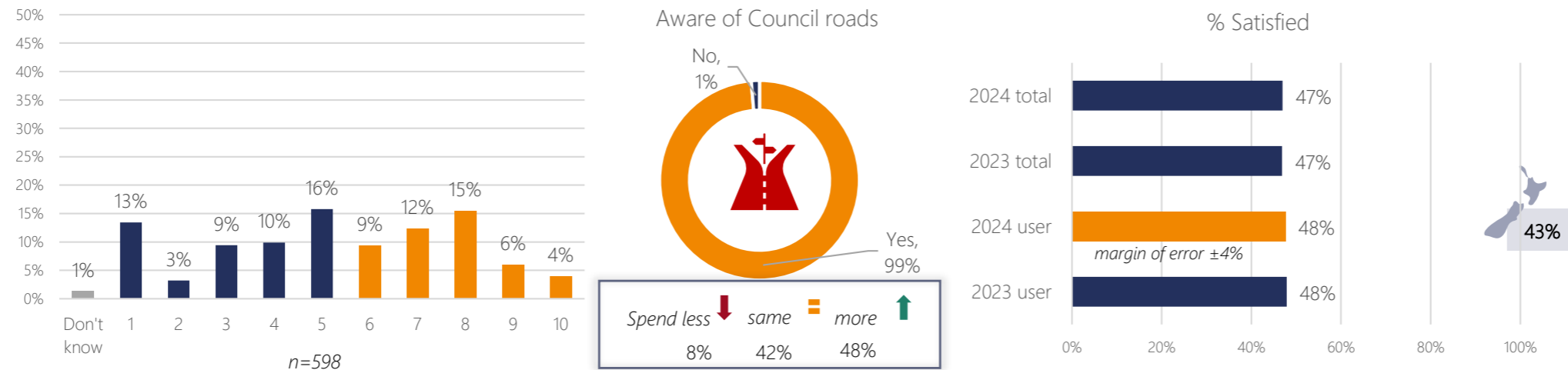
- In 2024, half (51%) of residents reported using the District’s refuse transfer station facilities throughout the year (up from 45% in 2023).
- 78% of users were satisfied with these facilities (average rating 7.4), similar to 2023 but down from 2022 – while remaining above the NZ benchmark.
- Satisfaction was notably higher in Galatea-Murupara.
- However, residents living in the District for 10 years or more were less satisfied on average (7.2), especially compared to those in the area for 5-10 years (8.7).



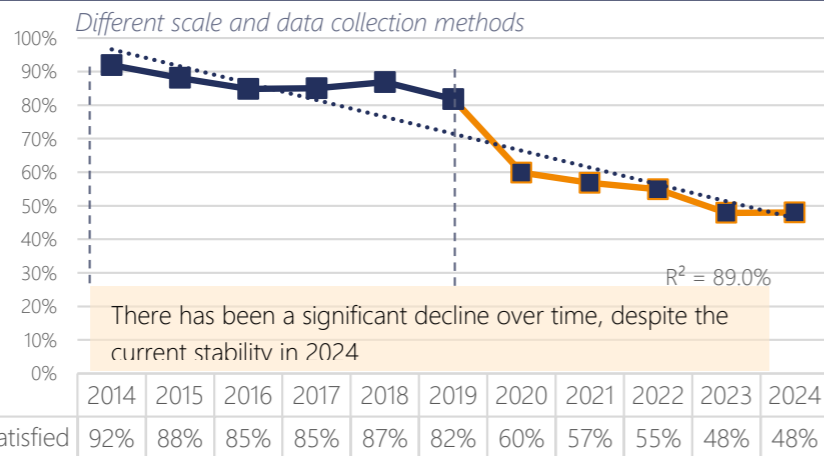
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

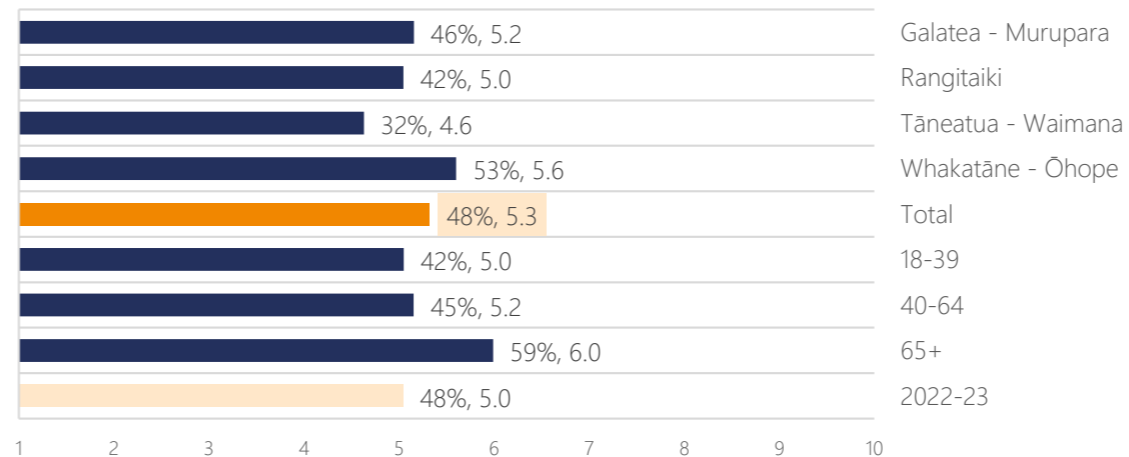
Council roads overall



- The recent trending decline in satisfaction with roads finally stabilised in 2024, with satisfaction at 48% - consistent with 2023.
- It is worth noting that satisfaction with roads has been declining nationwide in part reportedly to the increased frequency of extreme weather events and the reported presence of potholes across New Zealand.
- On average, residents in Tāneatua-Waimana were less satisfied with both roads and road safety.
- Satisfaction with roads remained higher among older residents (aged 65+) (59%), compared to younger residents.
- Roads remained the highest spending priority with 48% of respondents requesting more Council spending in this area – albeit down from 59% in 2023). Roading issues continued to be raised in verbatim comments.



Overall satisfaction by area and age (% satisfied and average score)

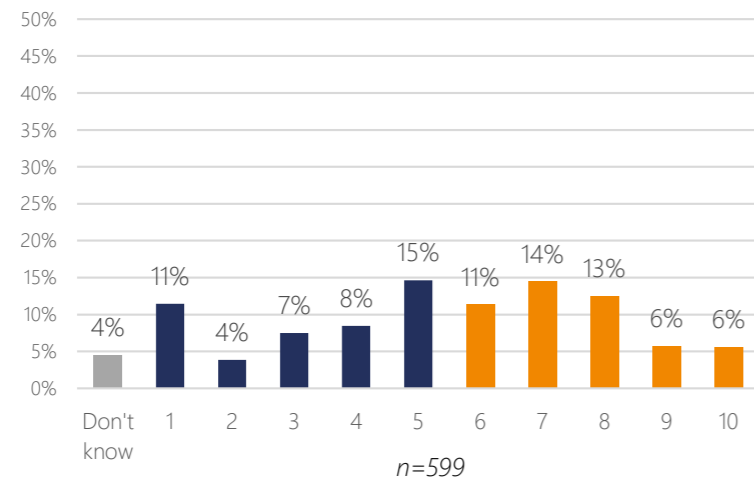


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

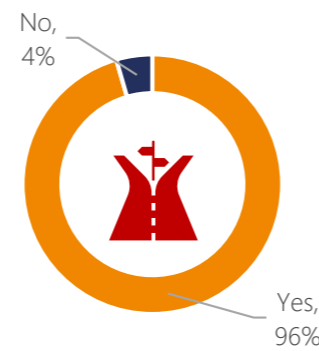
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE
(aggregated)

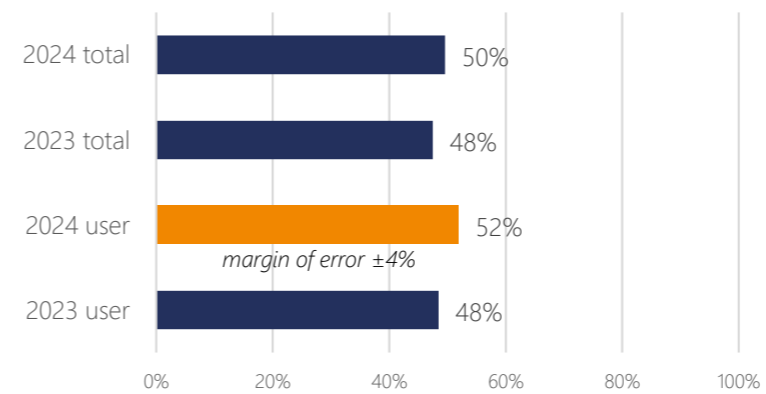
Safety of Council roads



Aware of Council roads

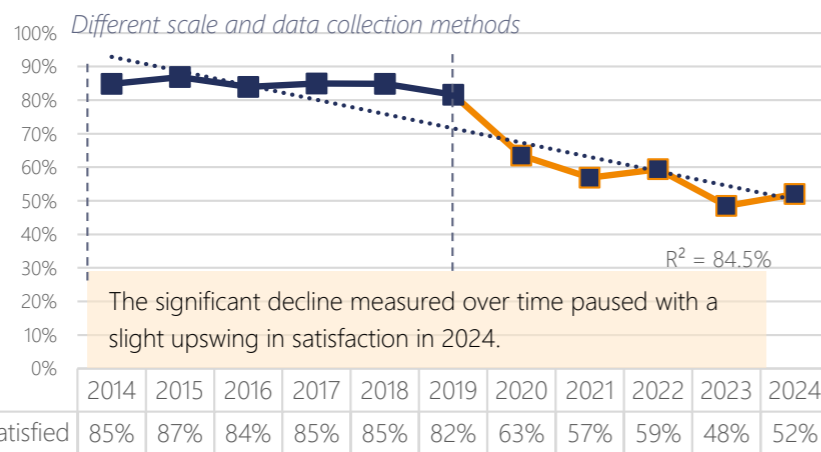


% Satisfied

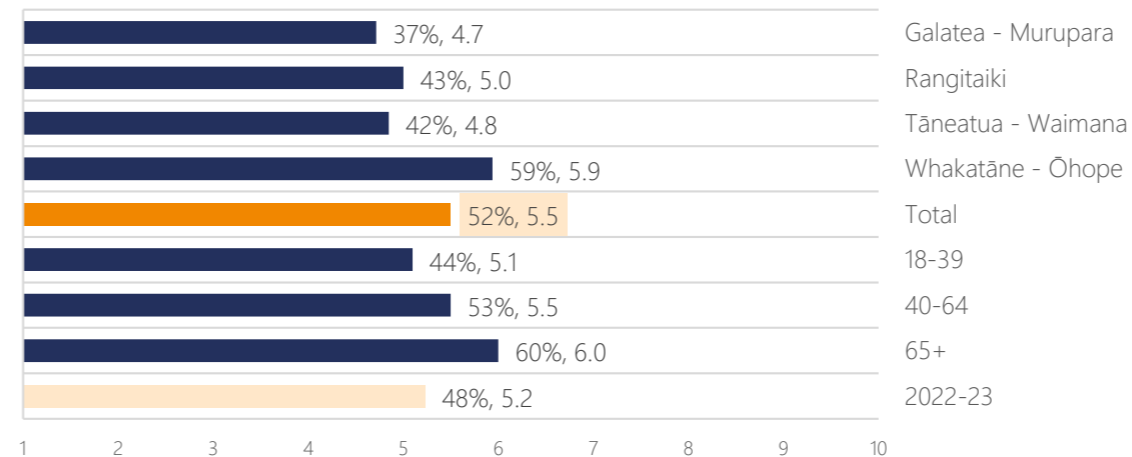


- Similar to roads overall, the declining trend in satisfaction with road safety stabilised in 2024 (52%), with a slight upswing compared to 2023 (48%).
- Satisfaction with road safety was lower outside Whakatāne-Ōhope, and particularly in Tāneatua-Waimana.

- Overall, satisfaction with roads generally and safety of Council roads exhibited a strong correlation with provided ratings.
- Community feedback indicated divided resident opinions about roading and related infrastructure developments, particularly the Landing Road roundabout, other layout and speed limit changes, and the ongoing demand for a second bridge in Whakatāne.

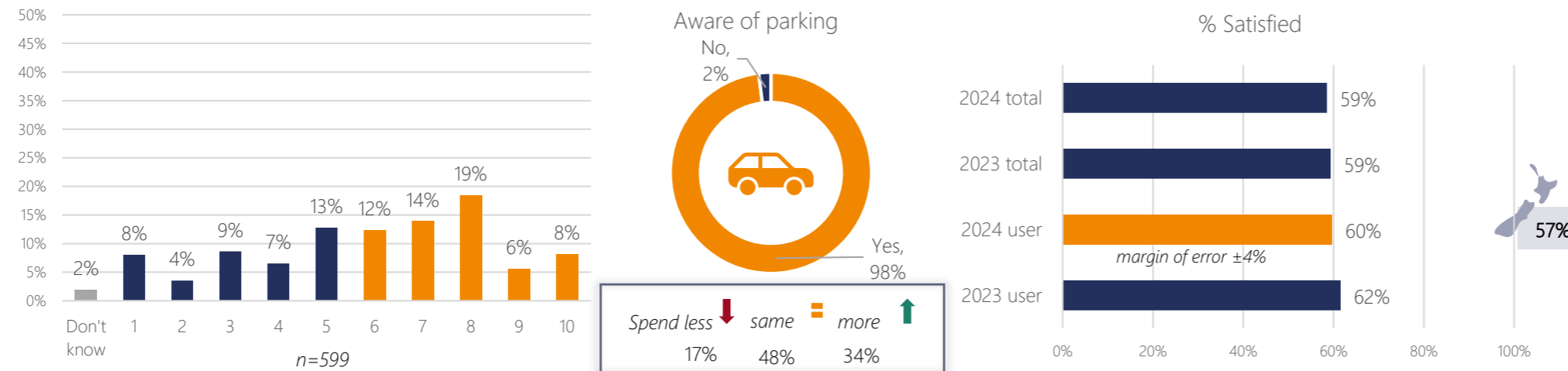


Overall satisfaction by area and age (% satisfied and average score)

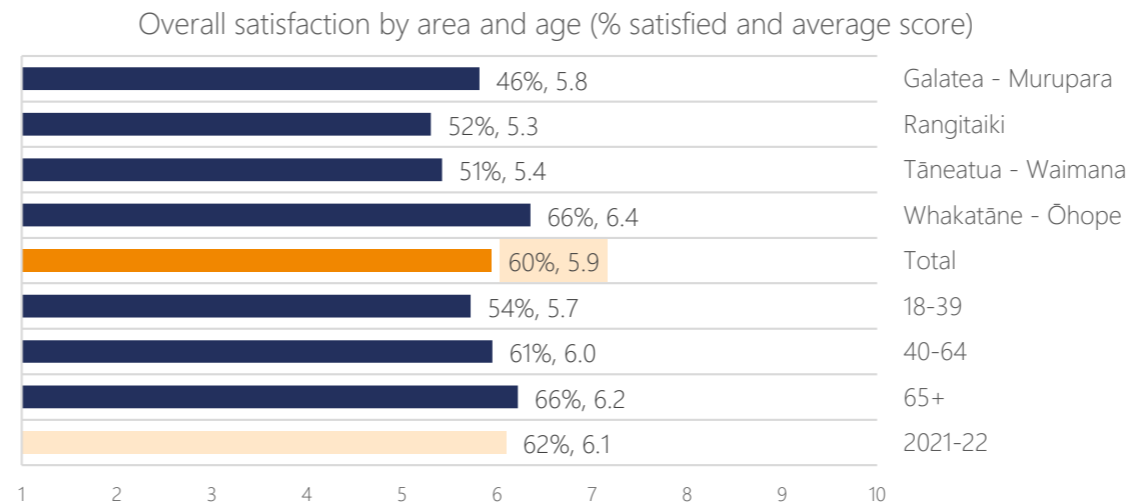
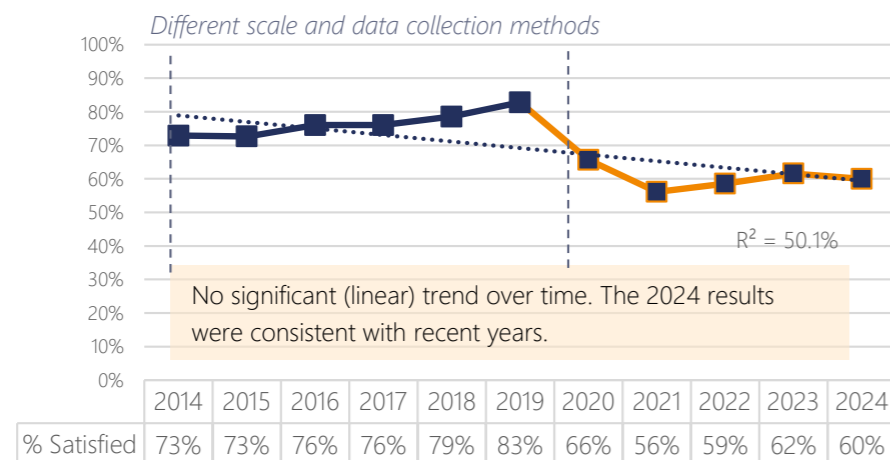


SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Parking in Whakatāne



- The recent uplift in satisfaction with parking in Whakatāne stabilised in 2024 (60%), similar to 2023 but above the 2021 level.
- Satisfaction with parking was typically lower outside Whakatāne-Ōhope. No significant age differences were measured in 2024.
- Consistent with 2023, half (48%) of residents favoured maintaining the same expenditure on car parking in 2024, though 1-in-3 (34%) wanted more spending.

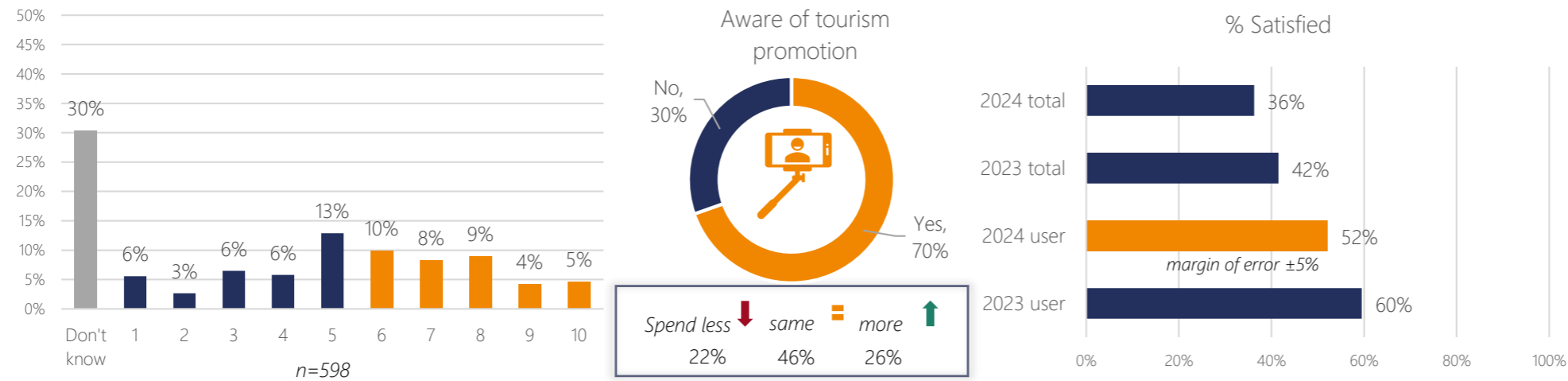


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

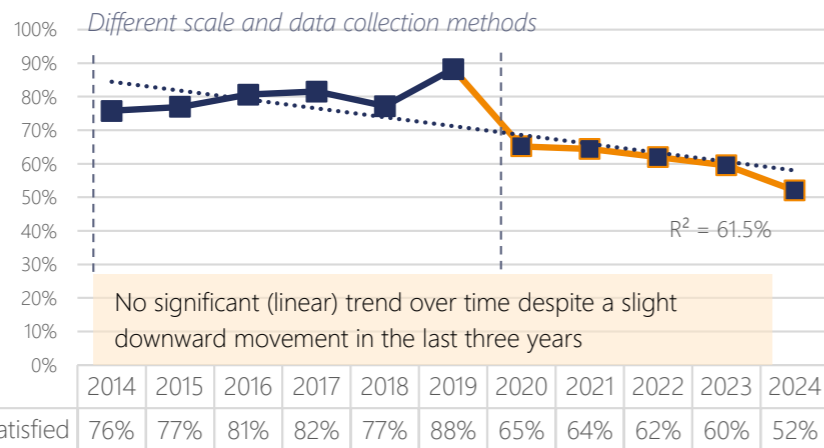
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Tourism promotion

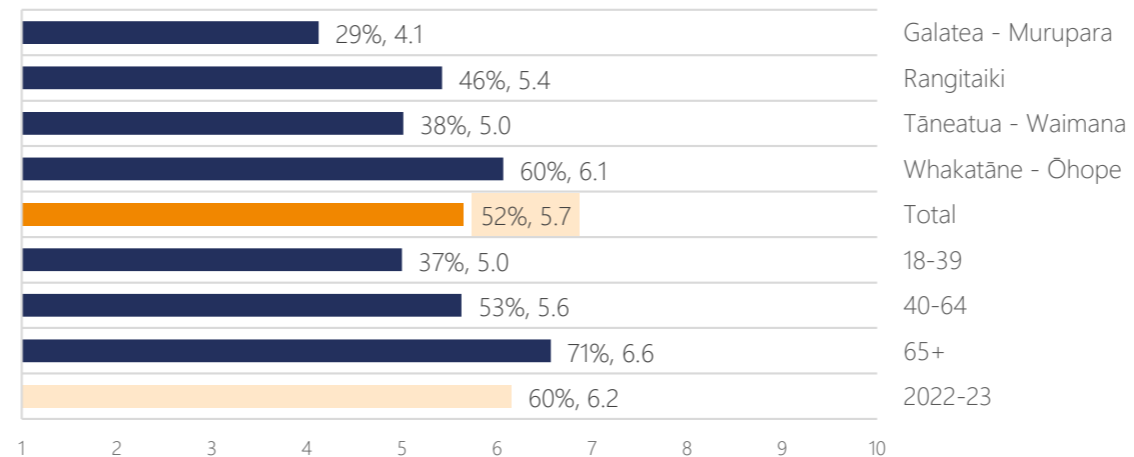
LTP MEASURE



- In 2024, 70% of respondents were able to rate Council’s support of tourism promotion. 52% of these residents were satisfied with this service (5.7 average rating), representing a decrease from 2023 and continuing the downward trend measured since 2021.
- Notable differences were apparent in attitudes towards tourism promotion – with lower satisfaction outside Whakatāne-Ōhope, and among residents aged under 65.
- Reflecting these sentiments, preferences for Council spending on tourism promotion were split – while 46% wanted the same level of funding maintained and 26% preferred an increase, this was also the 4th-most area highlighted for less spending (22%, up from 15% in 2023).



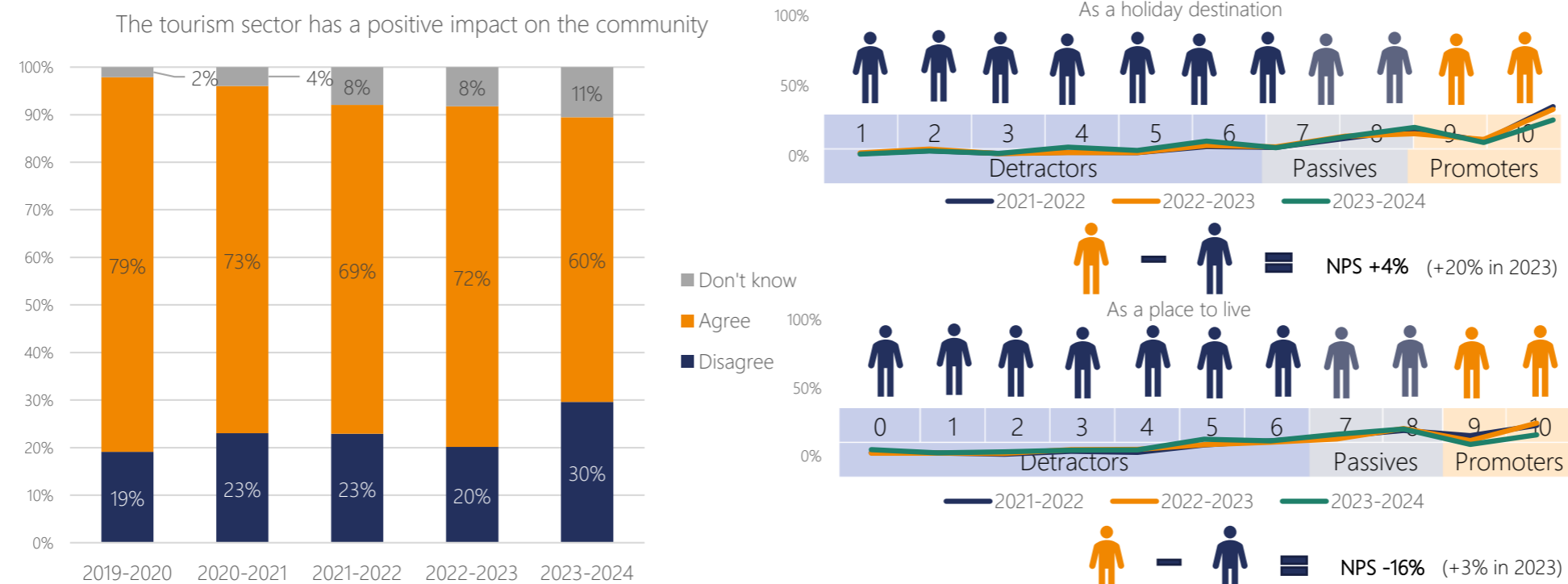
Overall satisfaction by area and age (% satisfied and average score)



7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Whakatāne as a holiday destination and tourism impact on the community



- Overall, residents were typically likely to recommend the Whakatāne District as a holiday destination; with 35% of residents providing top ratings of 9 and 10 (44% in 2023).
- The anecdotal NPS (Whakatāne District as a holiday destination) remained positive at +4% in 2024. However, this continued a downward trend compared to recent years (20% in 2023, 24% in 2022, 28% in 2021). This score remained greater than the likelihood of recommending the Whakatāne District as a place to live, which continued to drop but was negative for the first time (NPS -16%, from +3% in 2023, +7% in 2022).

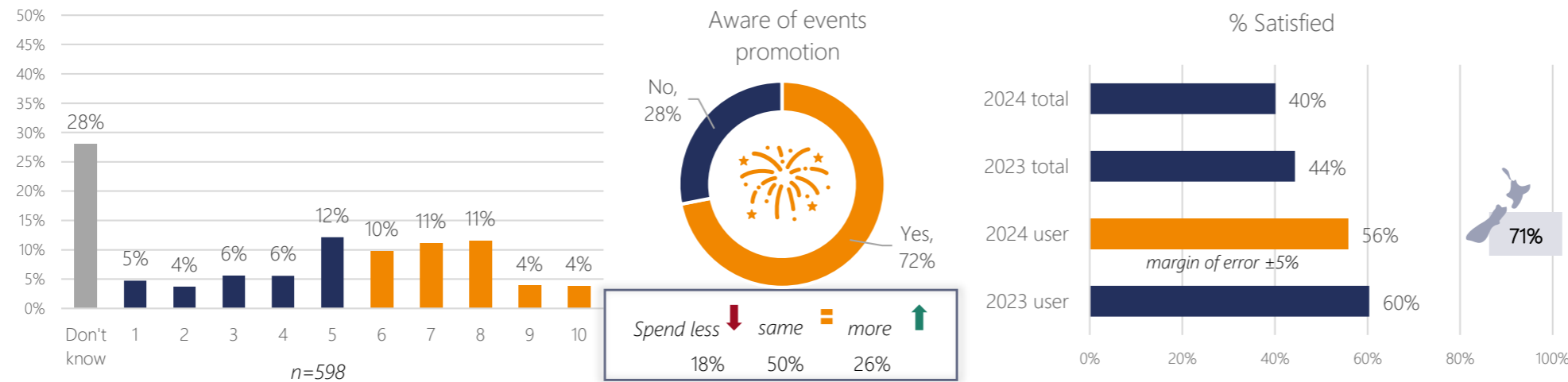
- As seen on p.43, 52% of residents were satisfied with Council's support of tourism promotion. In this context, the majority (60%) of residents in 2024 continued to believe that tourism has a positive impact on the community (albeit down from 72% in 2023).
- Note: Net Promoter Scores* range from -100 to +100, and can vary greatly across industries. A general rule is to keep the score above 0; results below zero should encourage improvements. In New Zealand, a good NPS should be around +30.

The Net Promoter Score (NPS) question asks respondents to rate the likelihood that they would recommend Whakatāne as a place to live on a scale from 0 ('not at all likely') to 10 ('extremely likely'). The reported score is calculated by subtracting the percentage of detractors (ratings 0 to 6) from the percentage of promoters (ratings 9 to 10).

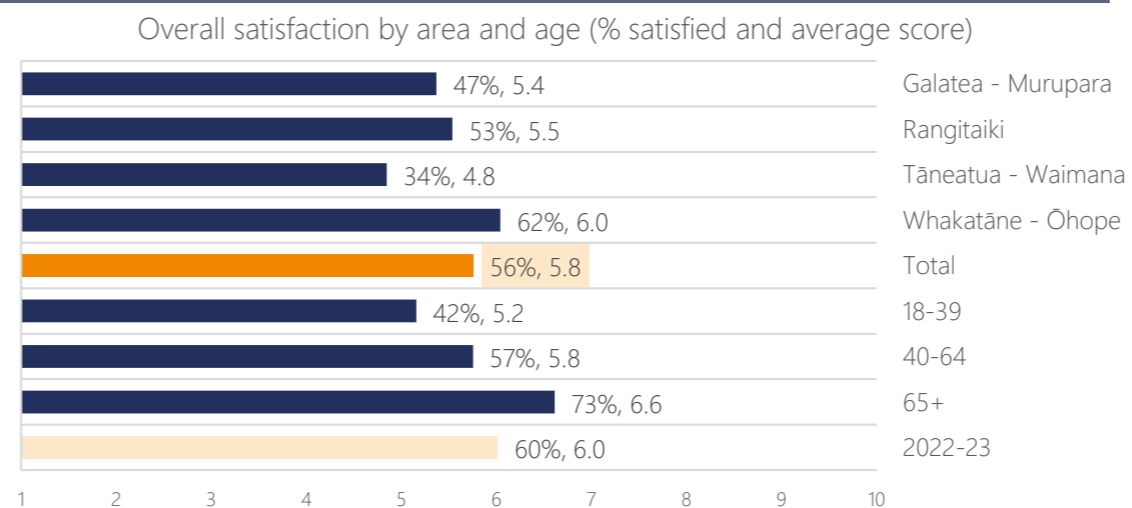
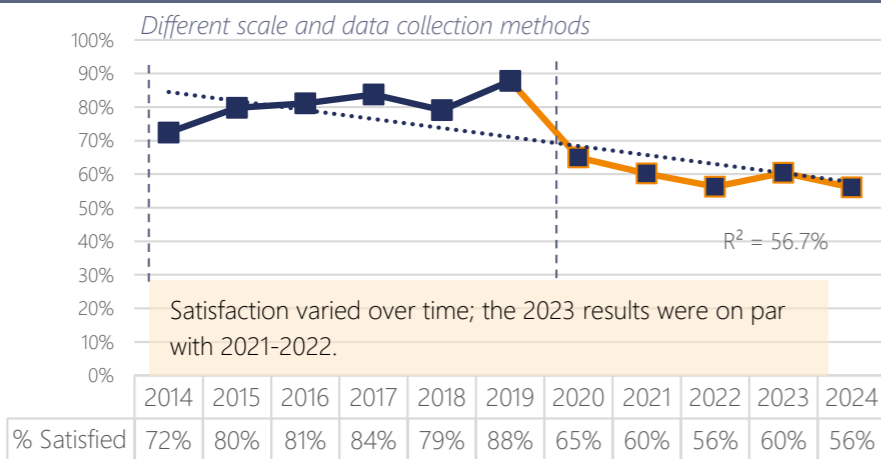
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Efforts to enable and promote events

LTP MEASURE



- In 2024, 3-in-4 residents (72%) rated Council's efforts to enable and promote events; uncertainty was still high (28% unsure, 27% in 2023).
- 56% of residents who provided a rating were satisfied with event promotion (average rating 5.8), slightly down from 2023 (but within the margin of error) but consistent with 2022.
- Previously measured differences in tourism promotion perceptions continued, with lower satisfaction among younger residents, and those from Tāneatua-Waimana and Galatea-Murupara.
- Overall, 50% of residents preferred seeing the same level of Council funds spent on events promotion (consistent with previous years).



7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

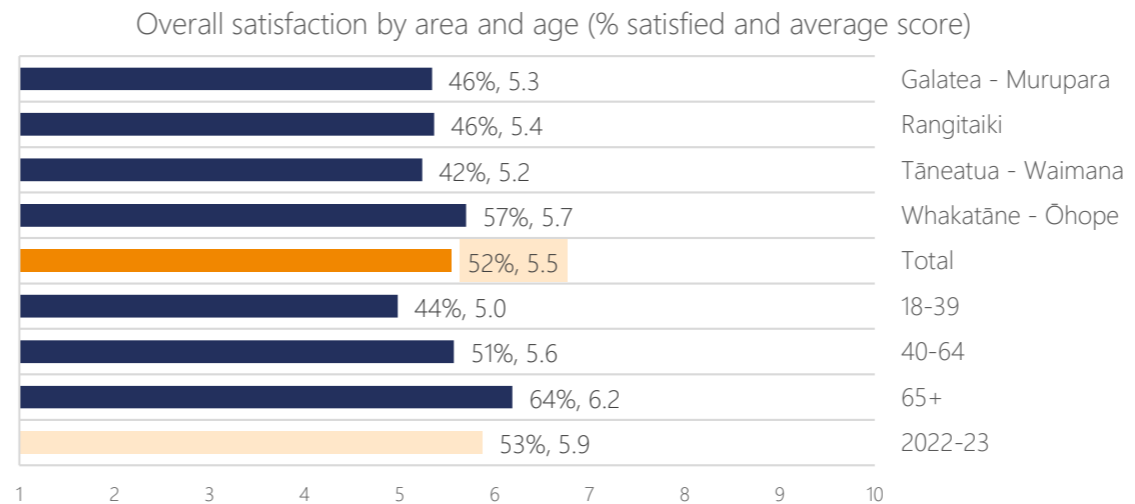
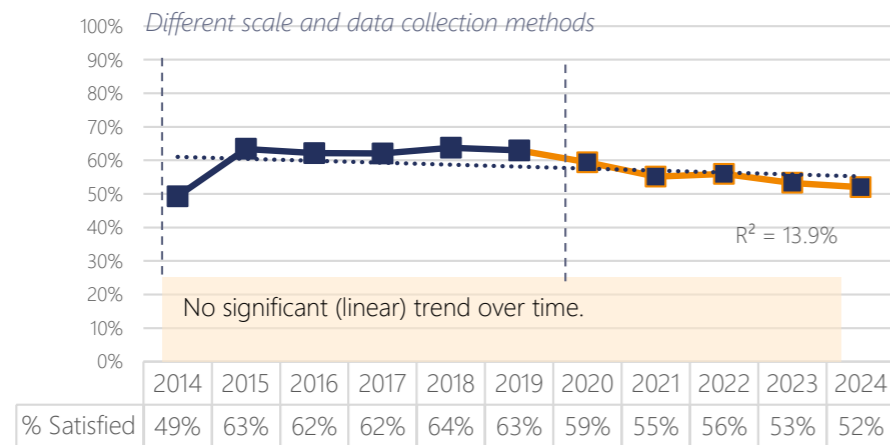
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Business promotion

LTP MEASURE

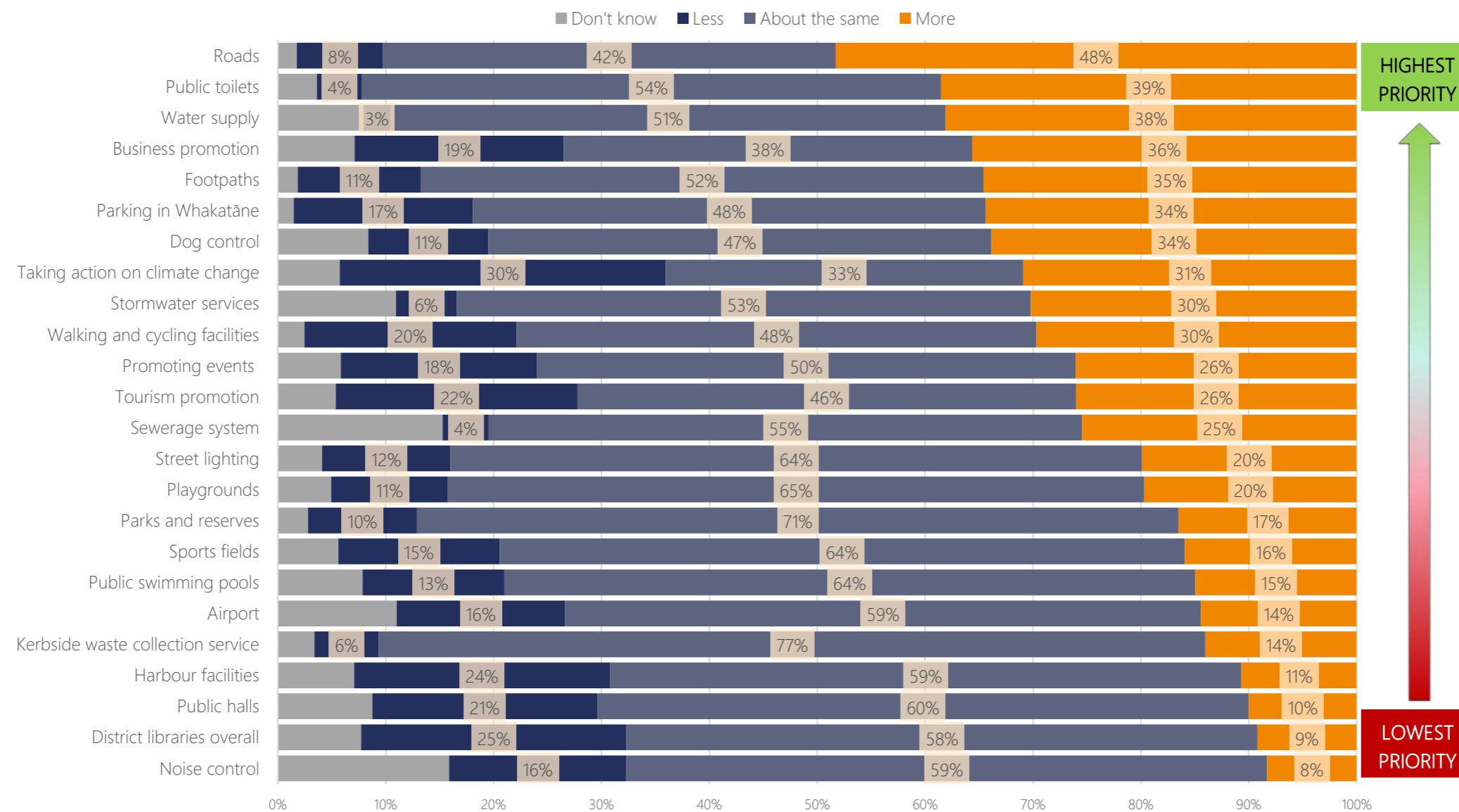


- Lack of knowledge about Council's business promotion activity continued in 2024 (41% of residents were unaware, similar to 2023).
- Nevertheless, over half (52%) of residents providing a rating remained satisfied with Council's efforts to attract and expand businesses; consistent in recent years with no significant trends over time.
- Satisfaction with business promotion was not significantly different across community board areas. However, residents aged under 65 remained less satisfied than those aged 65+.
- This activity remained a high priority among residents for more funding (36%) – ranked 4th for more Council spending in 2024.



SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

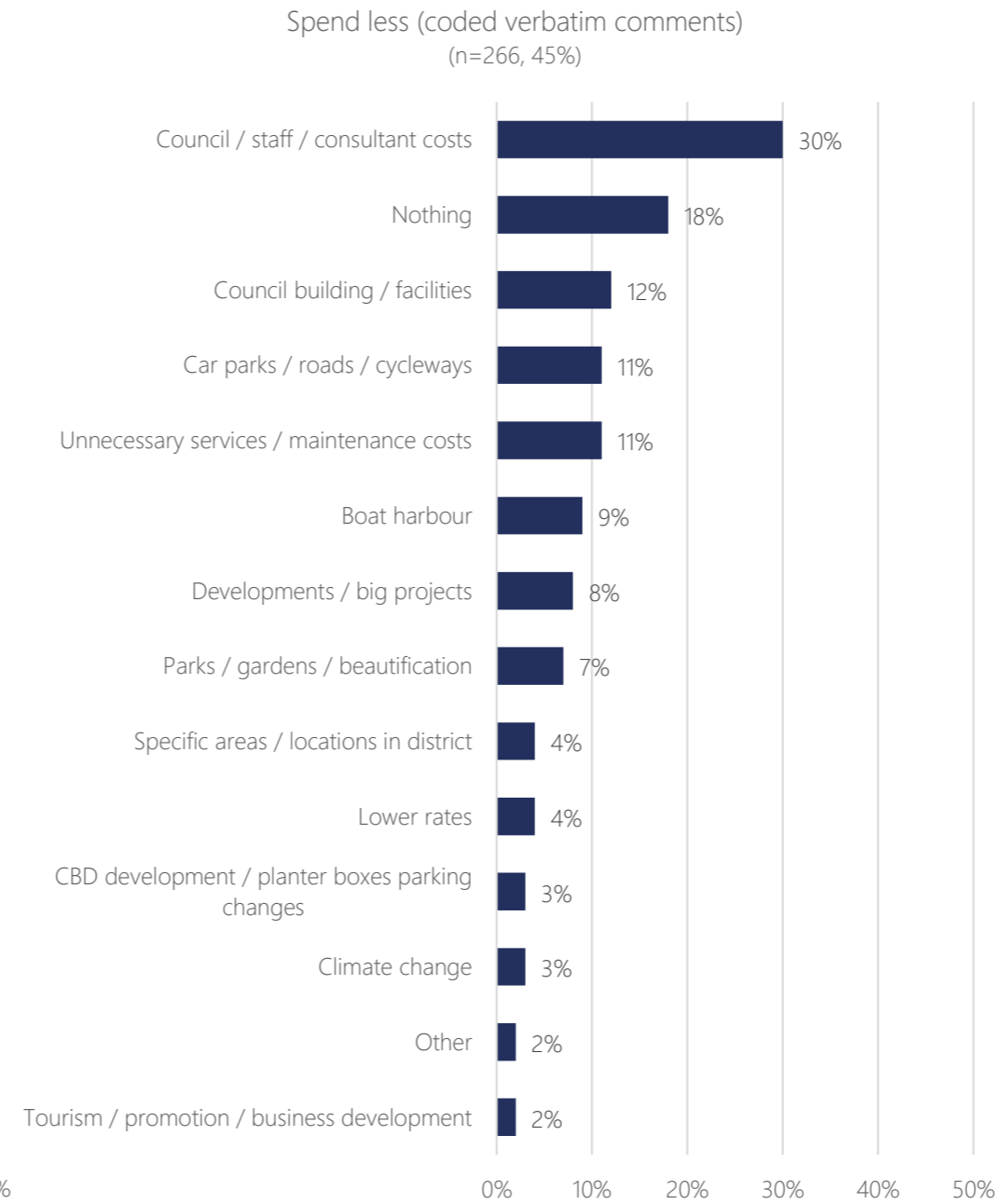
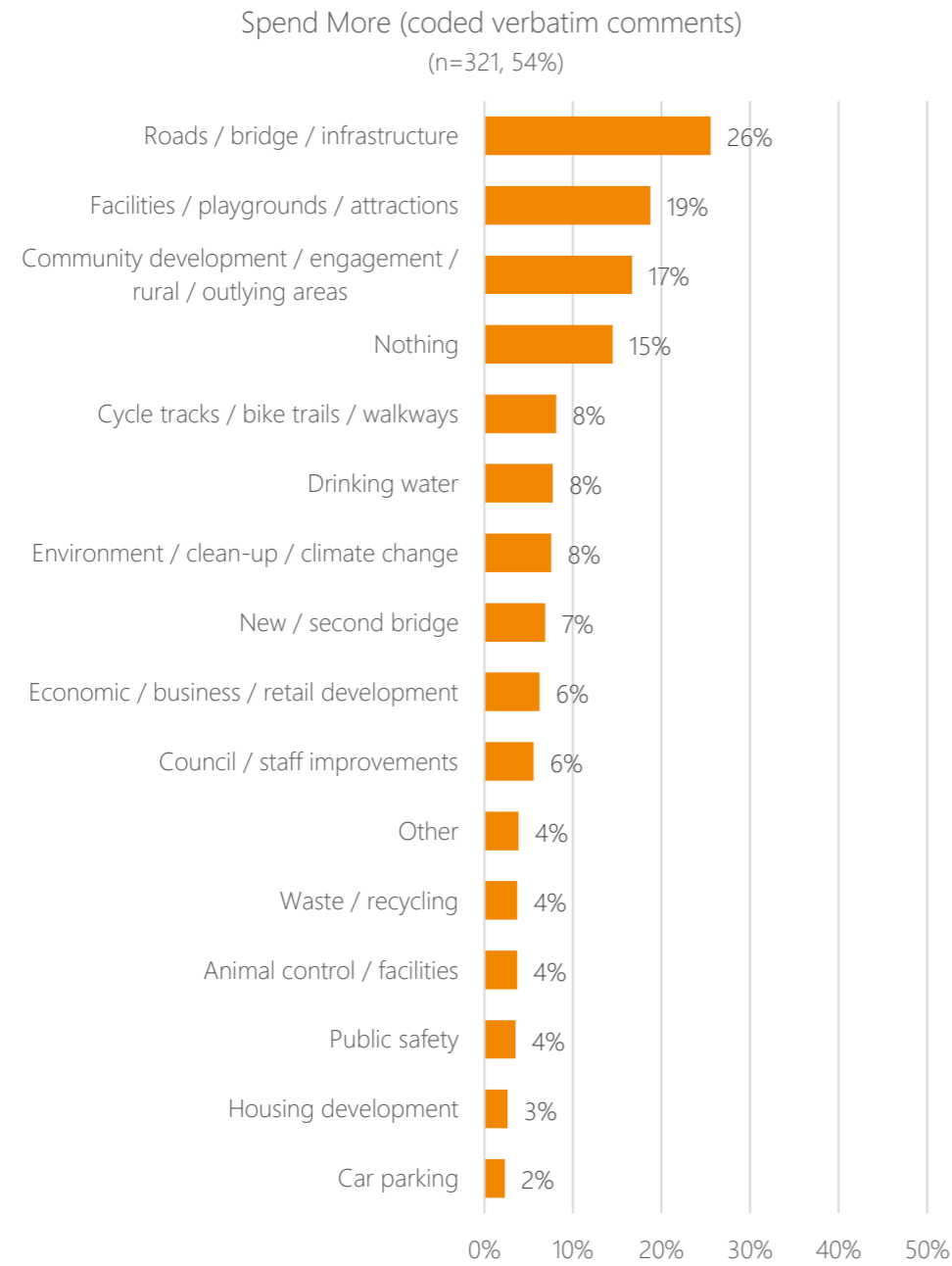
Spending priorities



7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

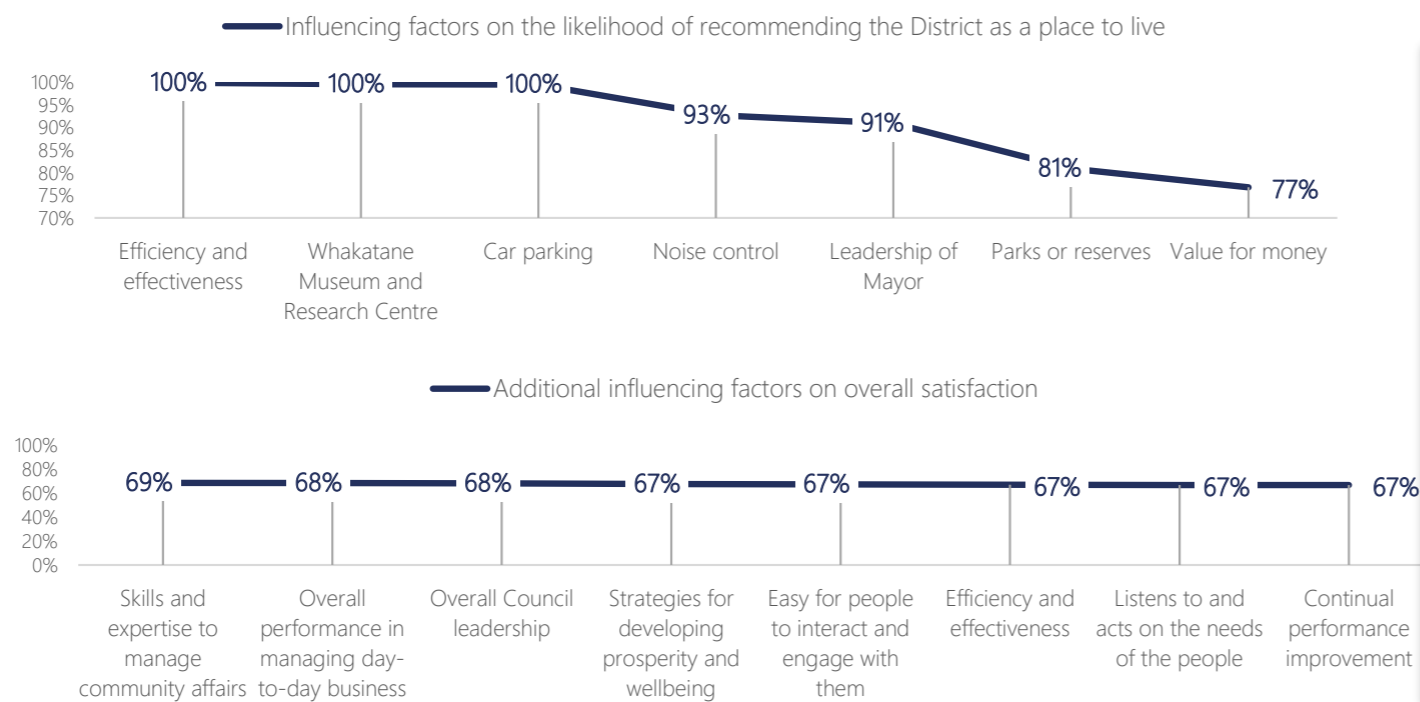
- Similar to previous years, the highest priority areas for investment in 2024 included roads (48%, albeit down from 59% in 2022) and public toilets (39%). Water supply (38%, ranked 7th in 2023), business promotion (36%), and footpaths (35%) rounded out the top five priorities for residents.
- In addition, among unprompted (free text) comments, roads, bridge and infrastructure were again the most cited areas for further development. Public *'facilities/playgrounds/attractions'* and *'community development / engagement'* were also frequently mentioned on a spontaneous basis (see chart on following page).
- Perhaps reflecting residents' broader concerns around rates increases and Council spending, 2024 saw a general fall in the proportion of residents wanting more funds spent across most service areas. Notably, while roads remained the highest priority area for more spending, preference for this was 11% lower in 2024 than in 2023. Overall, seven service areas saw support for more funding fall by 5%-points or more, including stormwater (down 8%), parks and reserves (down 6%), and climate change action (down 6%). Relatedly, 15% of unprompted comments about further investment suggested no additional expenditure was required.
- In this context, more respondents did suggest further increased spending in a few service areas: dog control (34%, an upward trend from 30% in 2023, 24% in 2022), kerbside waste collection (14%, up from 10% in 2023), water supply (38%, 35% in 2023), and sports fields (16%, 13% in 2023).
- Again, reflecting broader spending concerns, almost half (45%) of residents provided further spontaneous comments to decrease Council spending (up from 31% in 2023). Priority areas for reduced spending were Council costs and general expenditure, investment in the *'Council building'*, *'roading / car parks'*, and *'unnecessary services / maintenance'* (see chart on following page).
- Priorities for most spending areas differed by area and age.
- Roads remained a high spending priority across all areas, but especially in Galatea-Murupara (60%) and Rangitaiki (51%).
- Galatea-Murupara residents typically wanted greater increased funding in many service areas, including parking (50%), climate change action (48%), dog control (43%), playgrounds (42%), and event promotion (42%).
- Dog control was also a higher priority in Whakatāne-Ōhope (38%).
- Public toilets (59%) were a strong concern in Tāneatua-Waimana. Street lighting was a greater issue in both Rangataiki (25%) and Tāneatua-Waimana (23%).
- Roads were also the highest spending priority for residents of all age groups. Younger residents were more likely to also emphasise car parking (42%), public toilets (41%), and walking/cycling facilities (35%). Footpaths (49%) remained an ongoing investment concern for older residents in particular – level with their desire for more road funding.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)



SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Potential improvements



Over half (56%) of residents provided other (unprompted) comments. Almost half (44%) of these comments referred to rates increases and/or Council spending. Other top-cited issues and concerns were:

- Core services and infrastructure
- Better communication, customer service
- Roads / parking
- Community development / services
- Positive feedback
- Economy / tourism / attractions
- Mayor / councillor / staff performance
- New bridge required
- Environment / climate change
- Housing / retirement facilities
- Dissatisfaction with boat harbour project

- Infrastructure provision and particularly roads remained the primary theme identified for potential improvement by assessing relative importance against measured performance, and also being selected by residents as their highest spending priority.
- In addition, Council reputation, financial management, and communication continued to be key factors influencing overall satisfaction with Council performance. In light of the recent Long Term Plan spending decisions and related rates implications, financial and general management were of prime consideration for residents.

- Three areas were identified as having a significant impact on the likelihood of recommending the District as a place to live: general efficiency and effectiveness, The Whakatāne Museum and Research Centre, and car parking – in addition to several other important attributes.
- Public concerns about the latest proposed rates increases were highly salient and planned management of and investment in developments such as the boat harbour, roading layouts, and the Rex Morpeth Park upgrade – as well as the Council’s listening to the perceived needs of residents – had a clear impact on resident satisfaction.

7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)



CONTACT WITH THE COUNCIL

Satisfied with direct contact – 52%
Satisfied with community board member contact – 73%
Satisfied with customer service front desk – 73%



COUNCIL POLICIES AND DIRECTIONS

16% - Liked or approved recent Council actions, decisions or management
55% - Disliked or disapproved recent Council actions, decisions or management



COUNCIL REPUTATION

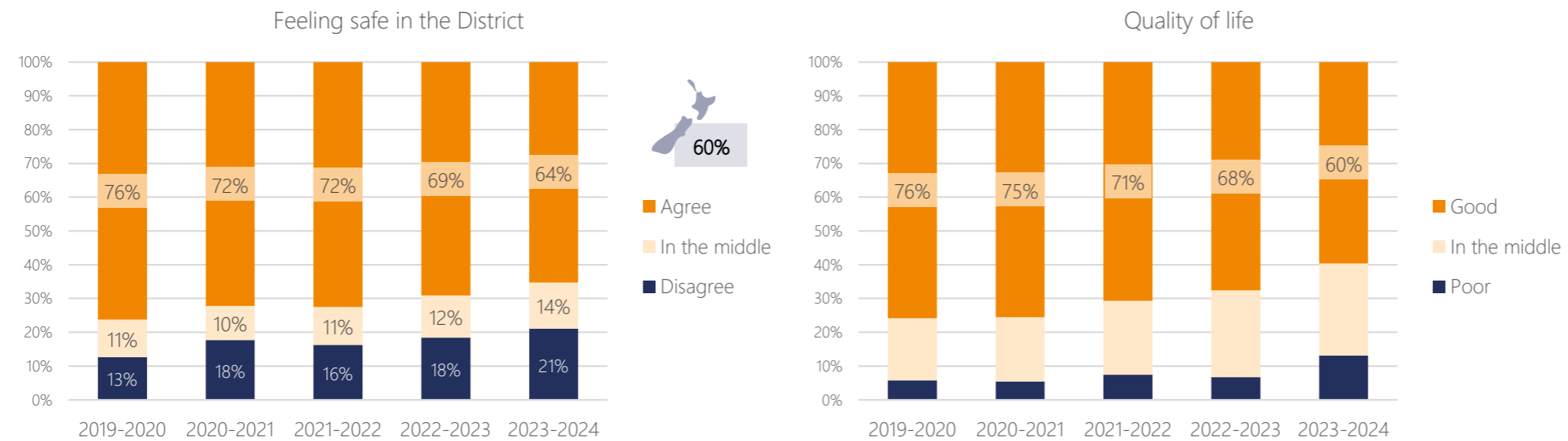
Communication with residents – 42%
Leadership – 36%
Day-to-day management – 33%



7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

LIFE IN THE DISTRICT

Perception of safety and quality of life in the District



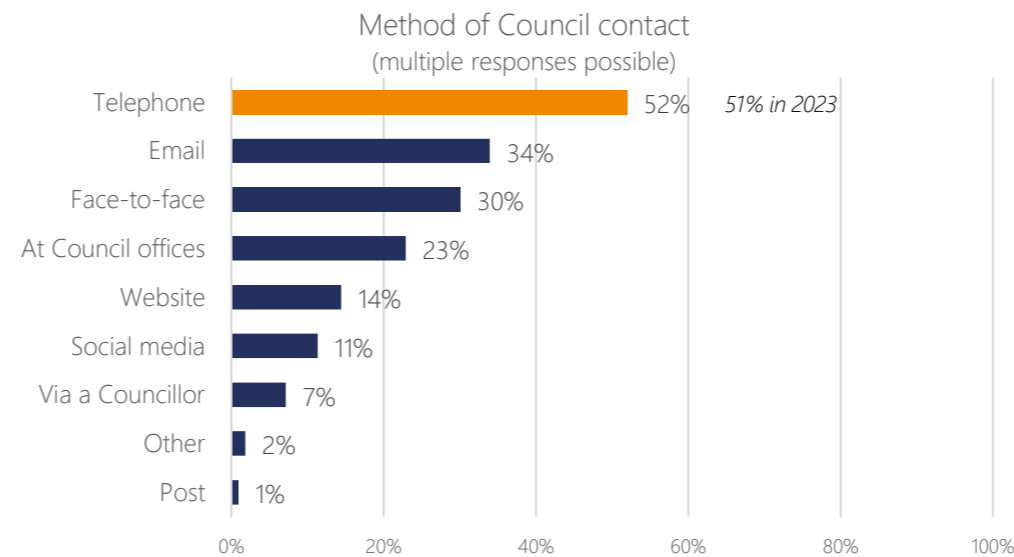
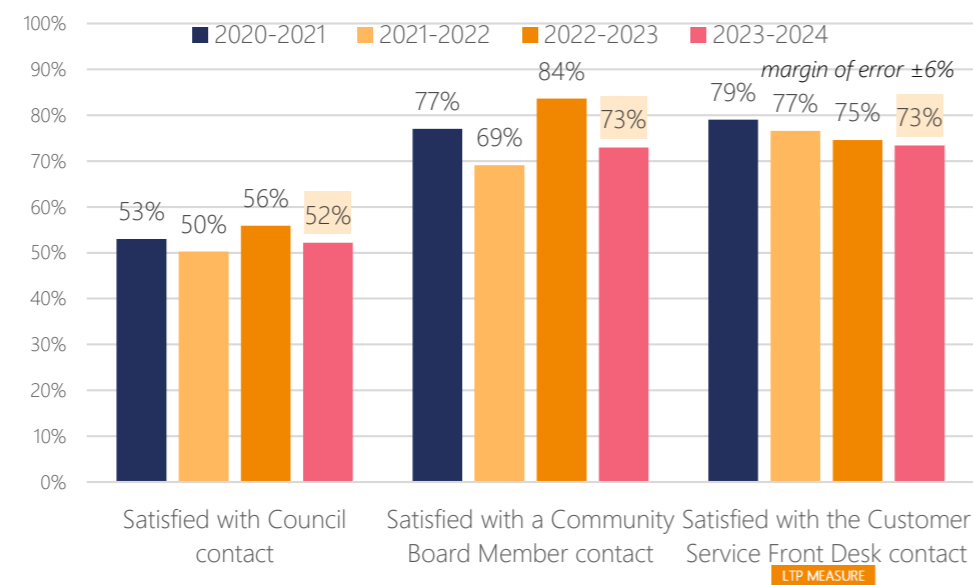
- Overall, 4-in-5 residents (78%) felt that the Whakatāne District is generally a safe place to live, to some extent (similar to 81% in 2023). However, the proportion who agreed (somewhat or strongly) they feel safe has gradually decreased over time (64% in 2024, compared to 69% in 2023). Nevertheless, this does remain above the national benchmark of 60%.
- Respondents aged under 65 typically remained less likely to feeling safe than those aged 65+.

- 3-in-5 (60%) of residents in 2024 believed their quality of life was 'good' to 'very good'. However, this continued a downward trend measured since 2022.
- Again, satisfaction with quality of life increased with age; rated good by 82% of 65+ year olds compared to those aged 40-64 (53%) and 18-39 (51%). Quality of life perceptions also tended to be higher for those living in the District for 10 years or more (60%) than for those residing for 2 to 10 years (52%).

CONTACT WITH COUNCIL

Contacted the Council, a community board member or customer service front desk

LTP MEASURE

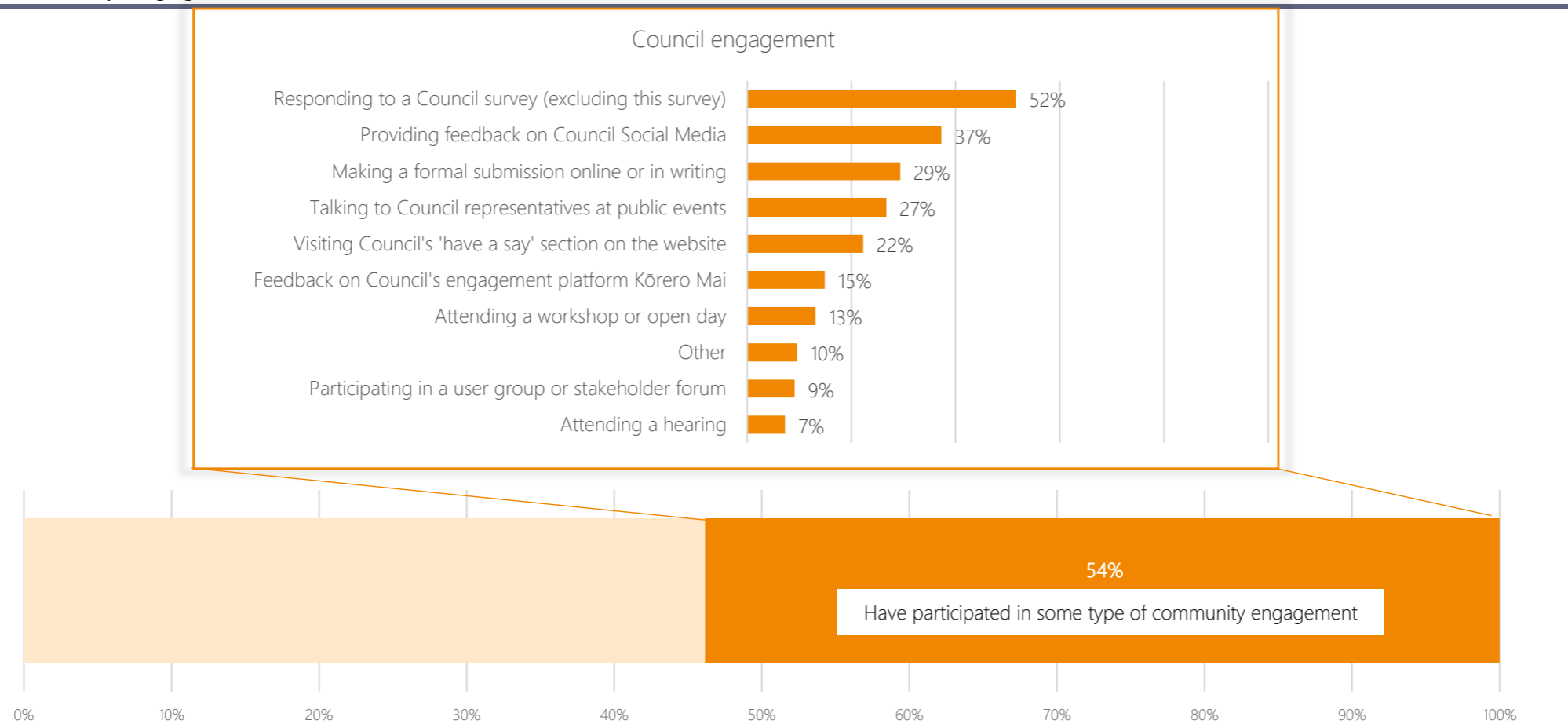


- Overall, 46% of all residents in 2024 stated they had contacted the Council throughout the year (44% in 2023).
- The two primary contact methods remained 'Telephone' (52%, 51% in 2023) and 'email' (34%, 32% in 2023).
- Younger residents (18-39) tended to make more contact with the Council by phone (60%) in addition to email (51%), website (24%) and social media (14%). Older residents preferred face-to-face or office visits.
- In 2024, 52% of residents who contacted the Council directly were satisfied with this contact (no significant change from 2023, similar to 2022).
- Longer term residents (10+ years) tended to be less satisfied with their contact (47%). No other significant differences were identified.

- 10% of residents in 2024 reported contacting a Community Board Member (also 10% in 2023), and 36% had contacted the customer service front desk (30% in 2023).
- Whakatāne-Ōhope and Rangitaiki residents remained less likely to contact a Community Board Member, compared to residents in other areas.
- Longer term residents (10+ years) and those from Rangataiki and Whakatāne-Ōhope were less likely to contact the customer service desk.
- Satisfaction with Community Board contact in 2024 (73%) was down from 2023 (84%), but above 2022 levels (variations subject to low sample sizes).
- Satisfaction with customer service contact in 2024 (73%) was similar to 2023. The gradual downward trend over the last four years was not statistically significant.

COMMUNICATION AND COMMUNITY ENGAGEMENT

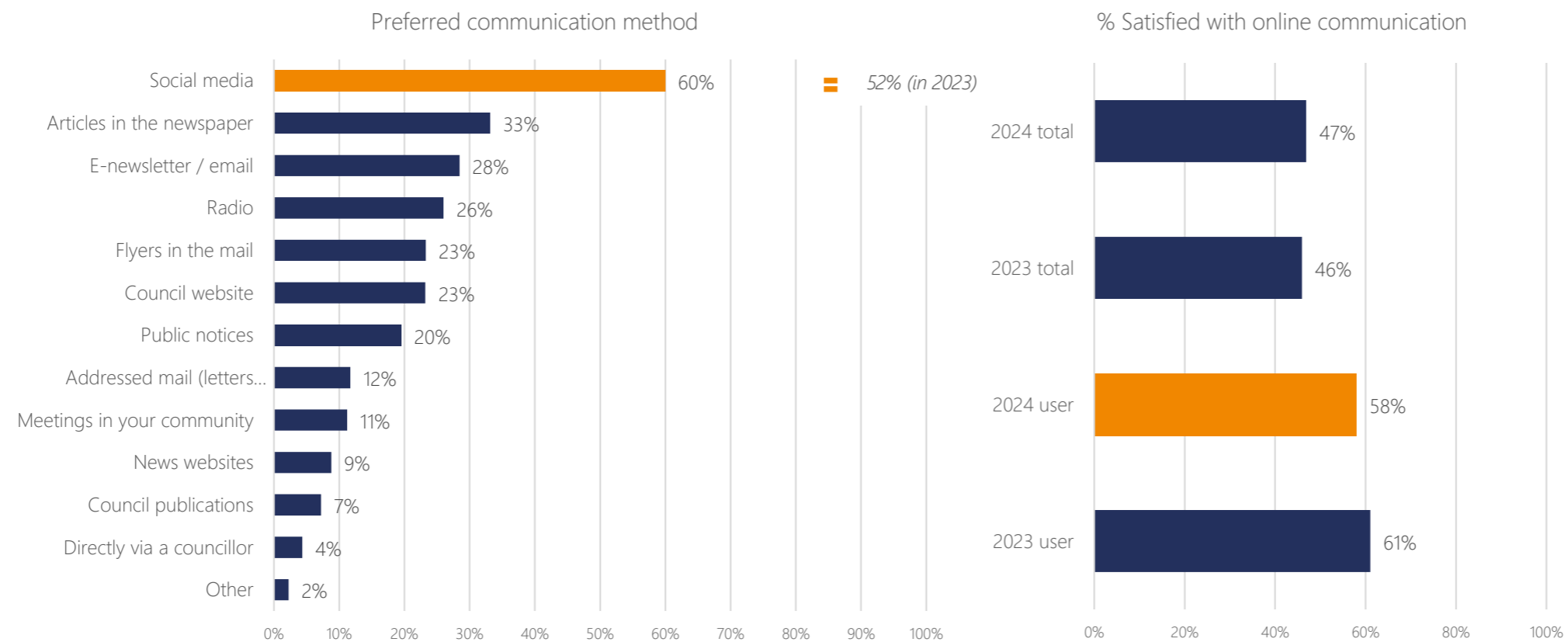
Community engagement



- Over half (54%) of residents in 2024 reported taking part in community engagement of some kind (up from 43% in 2023 and 40% in 2022).
- Half (52%) of these residents reported responding to a Council survey; around one-third reported providing feedback on social media (37%) or making a formal submission (29%, compared to 21% in 2023).
- 46% of residents stated they had not engaged in any Council engagement activities; this remained more likely among older residents (65+).

COMMUNICATION AND COMMUNITY ENGAGEMENT

Preferred method of communication

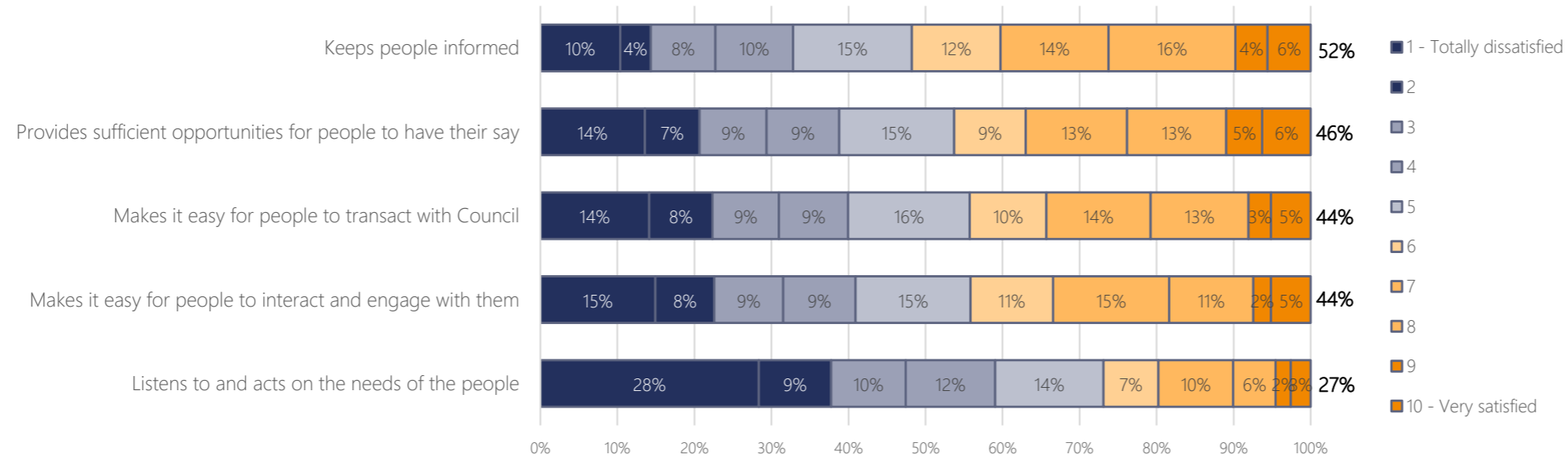


- *'Social media'* remained the most preferred method for Council communications, for over half (60%) of residents in 2024 (no change in the past years).
- Social media remained significantly more preferable for younger compared to older residents (71% 18-39, 68% 40-64, 30% 65+); though growing in prominence among those aged 65+ (up from 14% in 2023).
- Newspaper articles were the second-most preferred channel overall (33%, compared to 39% in 2023), and remained most preferred by residents aged 65+ (64%, compared to 14% 18-39, 29% 40-64).
- Social media was most preferred across all wards. Newspaper articles remained less preferred in Galatea – Murupara – where flyers had greater cut-through (55%).
- 58% of residents aware of online Council communications were satisfied with this online service and information provision, similar to 2023 (61%) but below the 2022 result (66%).

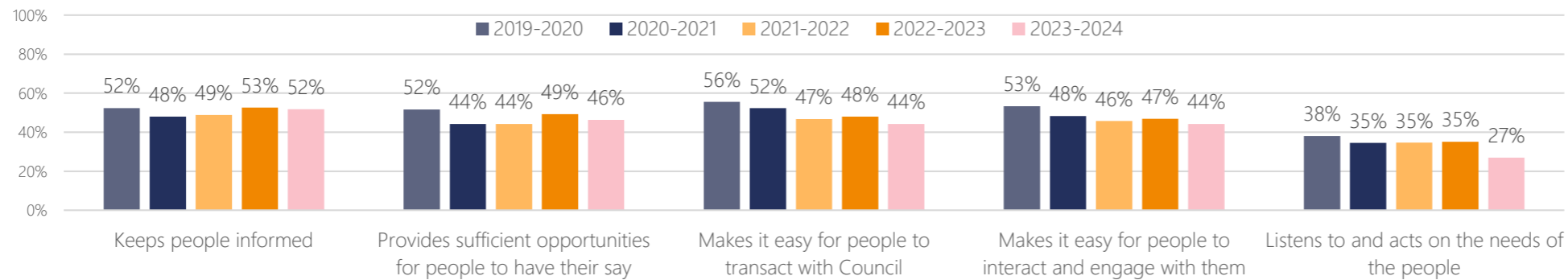
7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

COMMUNICATION

Communication with residents



- In 2024, satisfaction with most communication attributes was on par with 2023.
- 'Listens to and acts on the needs of the people' (27%) remained the least satisfactory attribute, and was significantly lower than in 2023 (35%).
- Ease of both transacting and interacting/engaging with Council have also seen gradual decreases over time.
- On average, satisfaction with most communication attributes remained higher for older (65+) residents than for those aged under 65. 'Keeps people informed' received the most consistent ratings across age groups.
- Longer term residents (10+ years) were also less satisfied with most attributes on average.



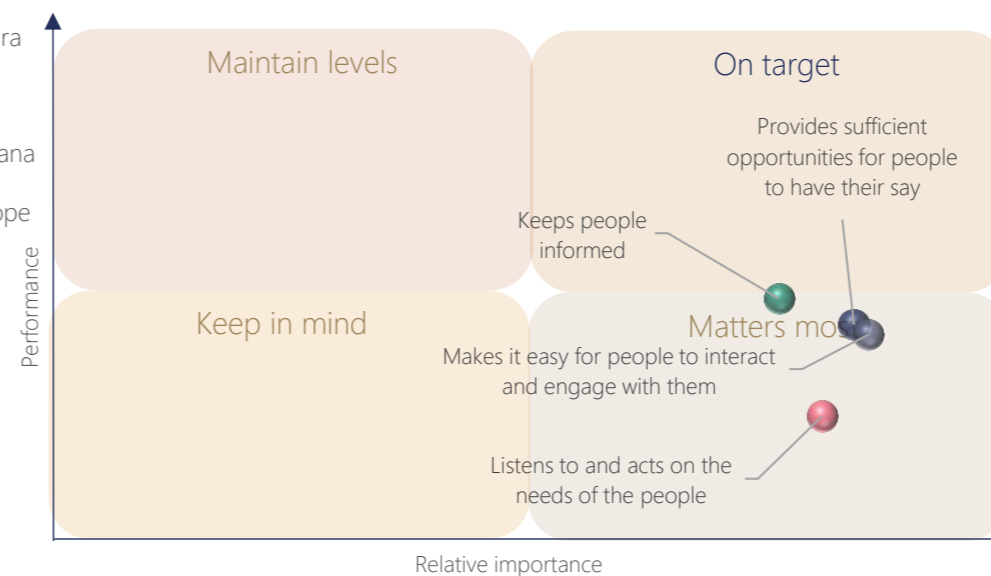
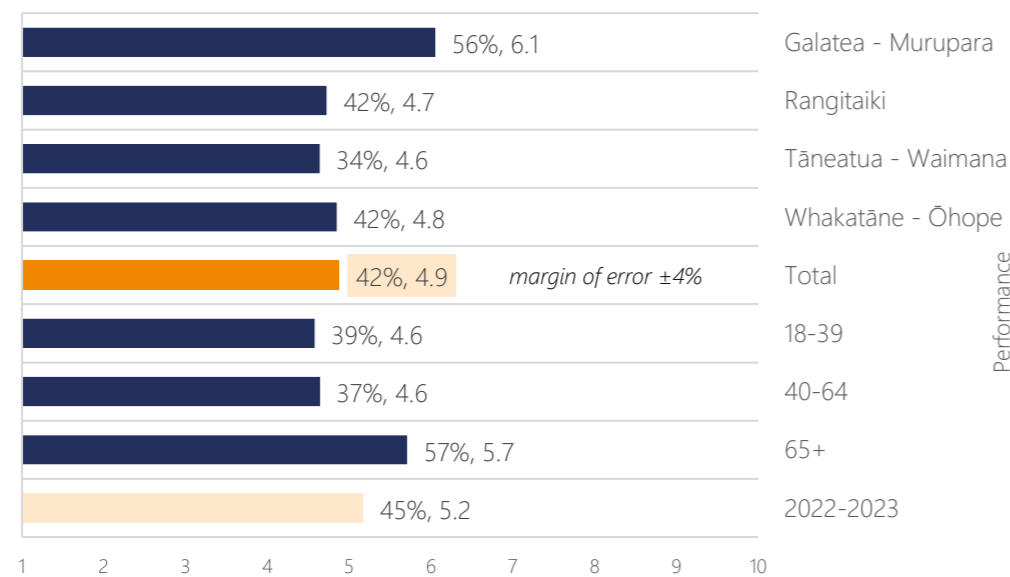
7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

COMMUNICATION

Overall satisfaction with performance in communicating with residents and ratepayers

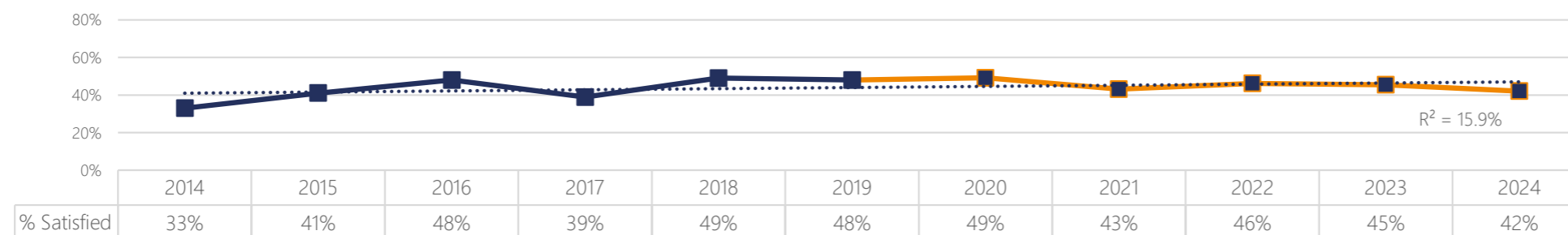
LTP MEASURE

Overall satisfaction by area and age (% satisfied and average score)



- Overall in 2024, 42% of residents were satisfied with Council’s performance in communicating and consulting with the public (45% in 2023), with no significant trends over time. However, there were noted differences based on both age and area.

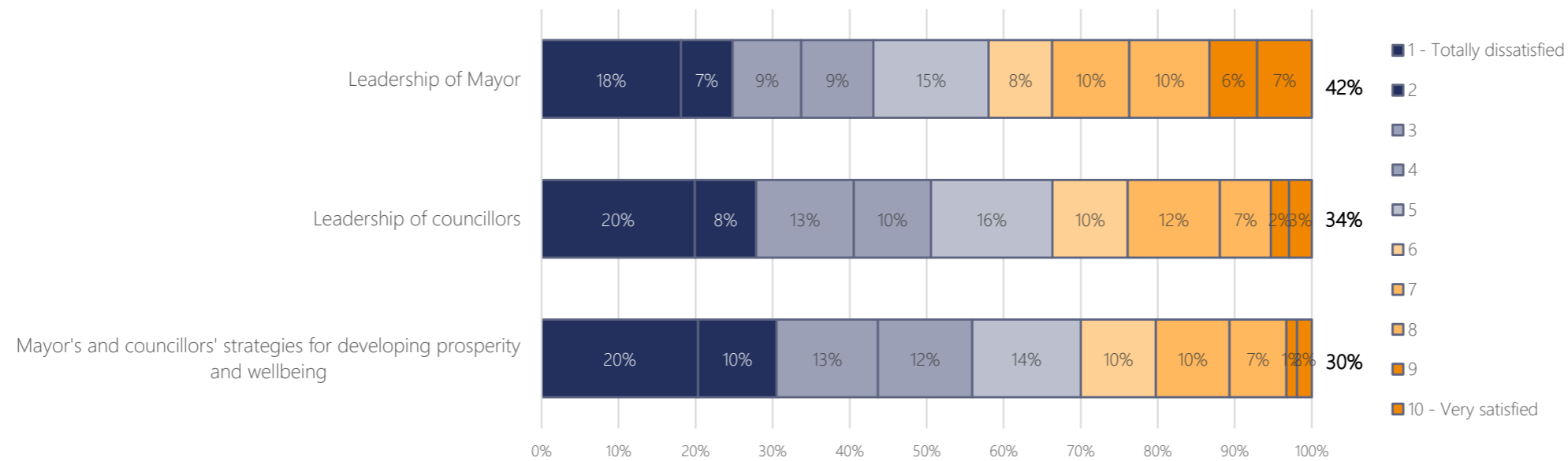
- Four statements relating to communication contributed significantly towards overall satisfaction.
- ‘Listens to and acts on the needs of the people’ (due to lowest performance but still high relative importance) continues to be a key factor that would benefit from further improvement to enhance resident sentiment and increase performance ratings.



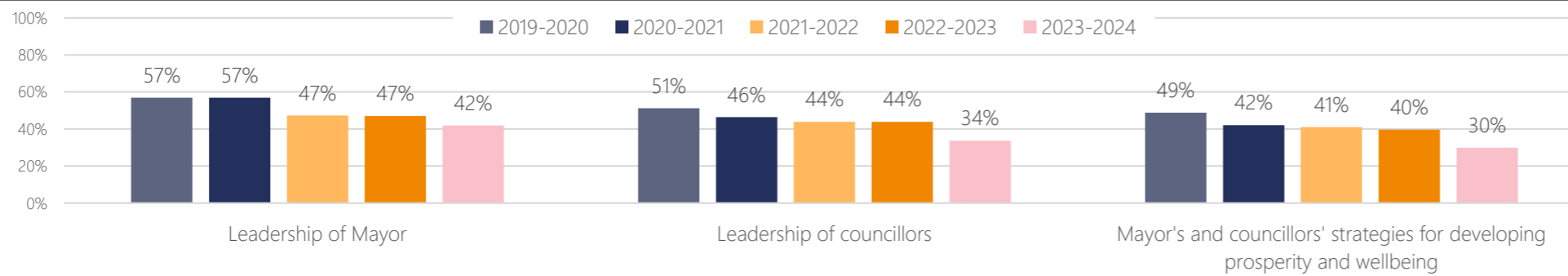
7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

COUNCIL LEADERSHIP

Performance in terms of Council leadership



- Satisfaction with Council leadership overall saw decreases in 2024 compared with previous years.
- All three attributes, on average, saw satisfaction decline through the 2023-24 tracking year.
- Satisfaction with Council leadership tended to be lower among younger residents (aged under 65 years), and longer term residents (living in the District for 5+ years).
- Satisfaction with leadership of the mayor was lower in Galatea-Murupara and Tāneatua-Waimana, on average.

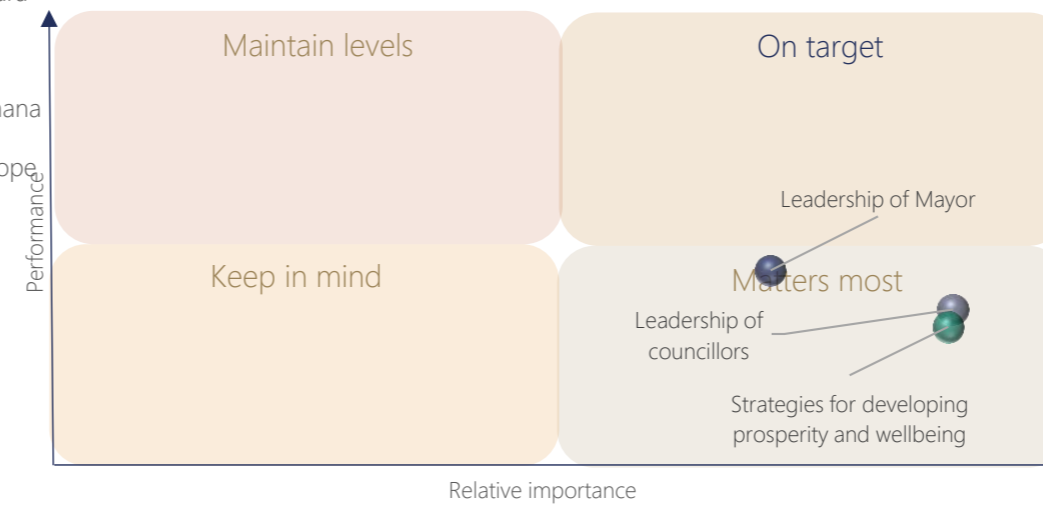
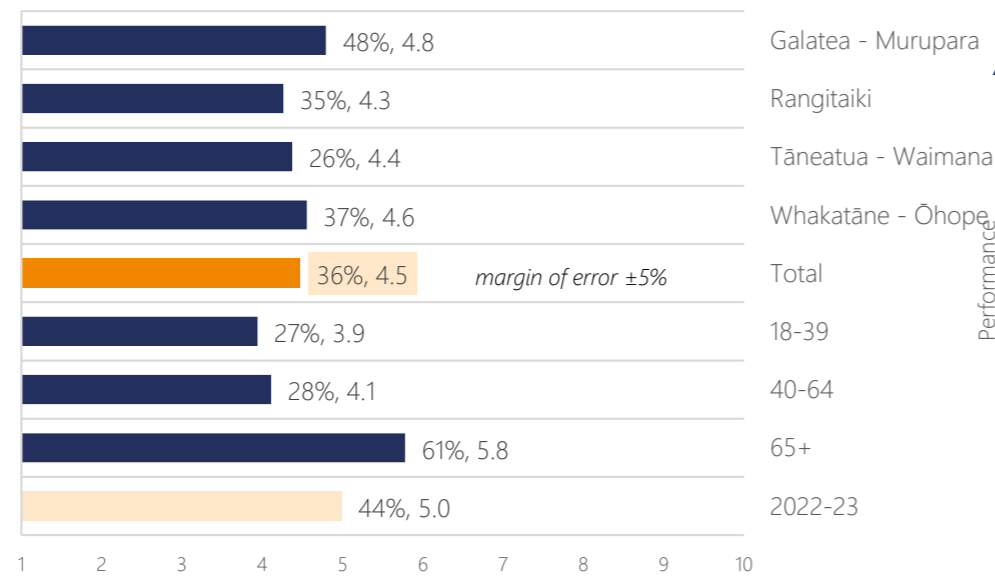


7.5.1 Appendix 1 - Whakatane District Council Resident Survey Report 2023-24(Cont.)

COUNCIL LEADERSHIP

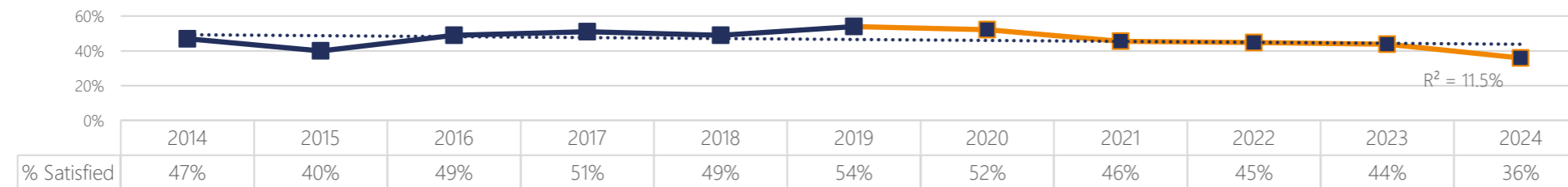
Overall satisfaction with Council leadership

Overall satisfaction by area and age (% satisfied and average score)



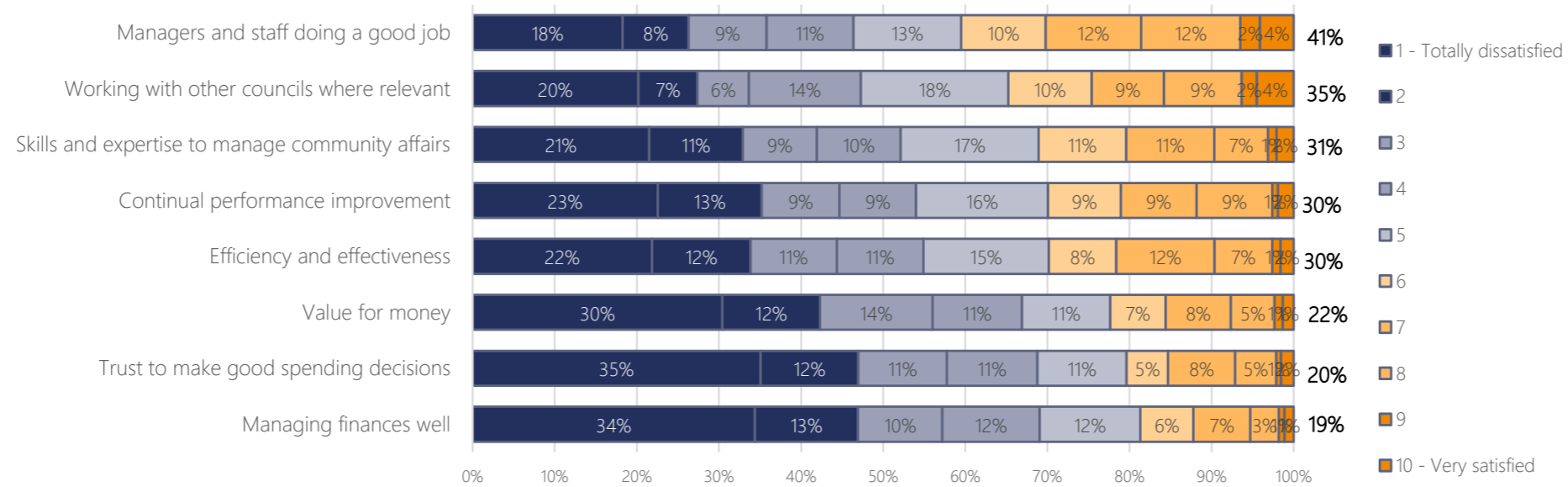
- In 2024, 36% of residents were satisfied with the overall performance of Council leadership (down from 44% in 2023).
- Older residents aged 65+, and females generally, were significantly more satisfied with Council leadership overall.

- All three leadership-related attributes contributed significantly towards overall satisfaction. In the current economic climate, 'Mayor's and councillors' strategies for developing prosperity and wellbeing' takes on particular importance and additional benefit would be gained from further improvement to enhance resident sentiments of performance in this regard.

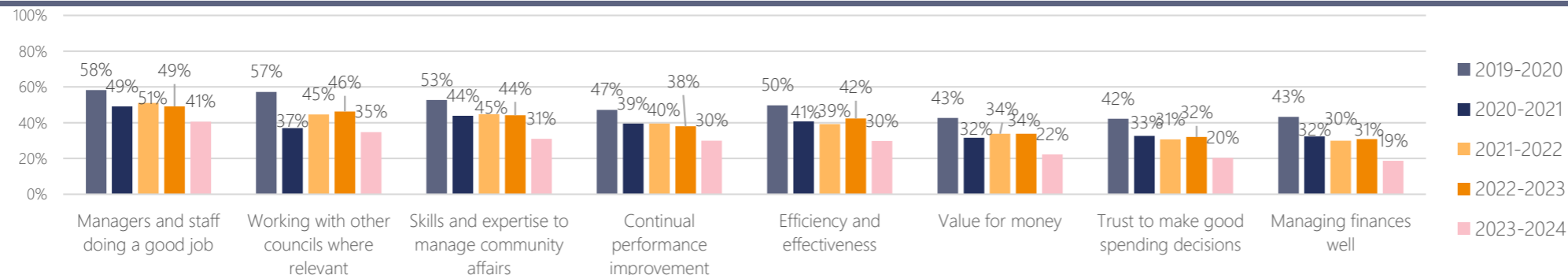


MANAGEMENT

Managing day-to-day business



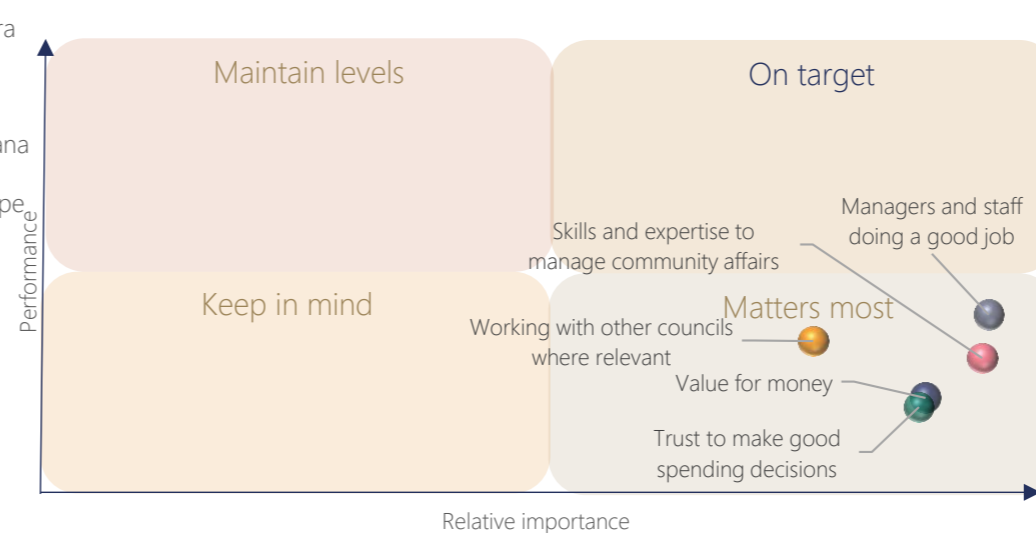
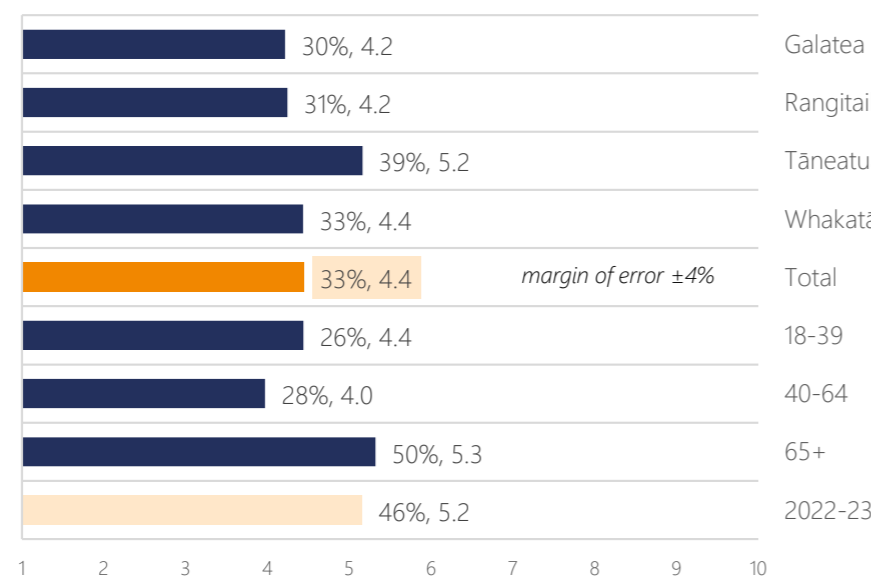
- In 2024, satisfaction with all eight management attributes registered decreases compared to 2023 and previous years.
- Nevertheless, residents in 2024 remained most satisfied with managers and staff doing a good job; 41% rating this 6 or above (49% in 2023).
- Residents continued to be least satisfied with financial management: value for money (22%), trust to make good spending decisions (20%), and managing finances well (19%).
- Financial management was one of the key themes emerging in the community's feedback regarding Council spending.
- Older residents (65+) remained more satisfied with Council management, including financial matters, on average.
- Females were more satisfied than males across many attributes.
- There were no significant differences by area in 2024.



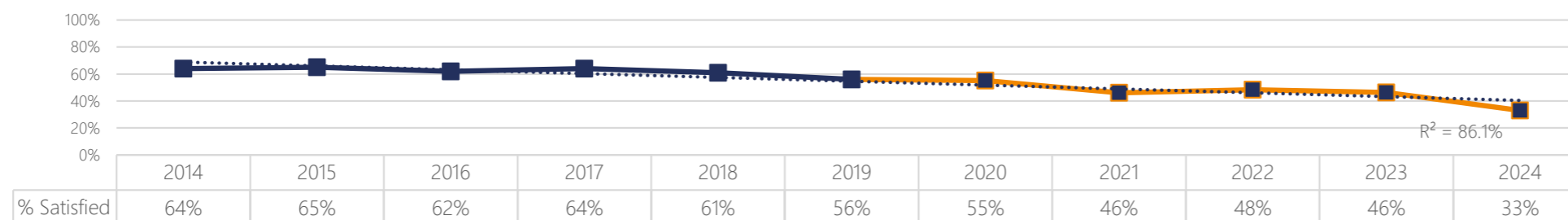
MANAGEMENT

Overall satisfaction with performance in managing day-to-day business

Overall satisfaction by area and age (% satisfied and average score)

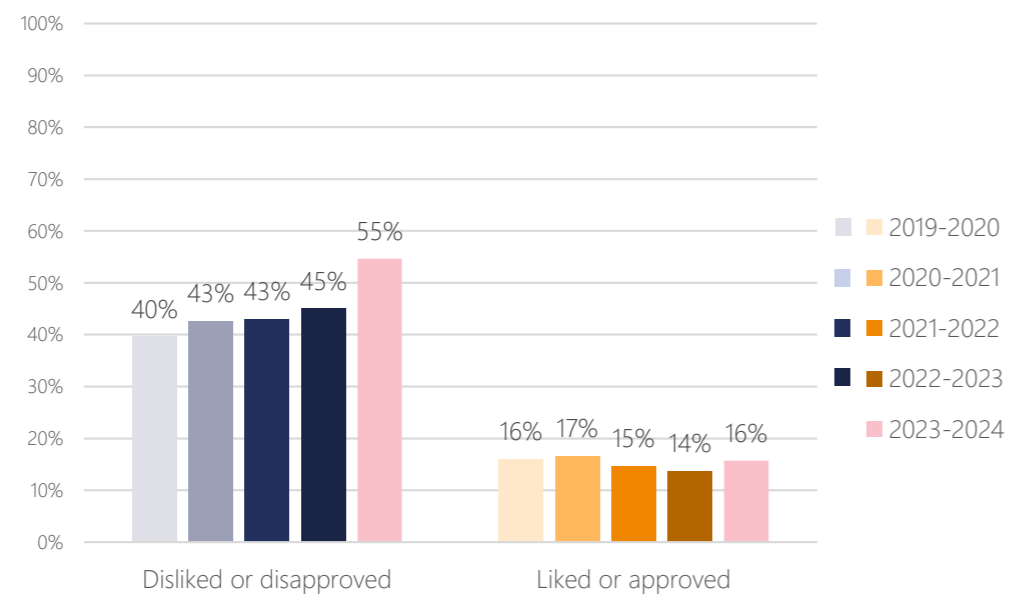


- 1-in-3 (33%) of residents in 2024 provided high satisfaction ratings (6 or above) for Council’s overall management of day-to-day business; notably down from 2023 (46%).
- Older residents (aged 65+) remained most satisfied with Council management overall (50%), though down from 65% in 2023.
- Longer term residents (10+ years) also tended to be less satisfied with overall Council management (31%).
- Five attributes significantly contributed towards overall satisfaction with Council performance in managing day-to-day business. In light of resident concerns around Council spending, value for money and trust in spending decisions exhibited particularly strong opportunity for improvement.



POLICY AND DIRECTION

Council policy and direction approval or disapproval



- Overall, 16% of residents in 2024 recalled a recent Council action, decision, or management experience they **approved** of (similar to 14% in 2023). These residents mainly referred to Council’s road maintenance/repairs (particularly the new Landing Road roundabout), the Rex Morpeth Park upgrade, other maintenance and infrastructure works, and general satisfaction with Council.
- Over half (55%) of residents recalled a recent action, decision, or management experience they **disapproved** of, an increase on previous years (and up from 45% in 2023). Rates increases (and related spending) was the key target of concern (43%, up from 18% in 2023). Other key concerns were roading and roundabout changes, and boat harbour/wharf development.
- Older respondents (65+) (22%) and Galatea-Murupara residents (25%) were more likely to approve of any Council policies or directions; 40-64 year olds (61%) and longer term residents (10+ years) (60%) were likely to disapprove.

- Roading / roundabout / layout changes / speed limits – 41%
- General satisfaction with Council / communication – 18%
- Maintenance / repairs / infrastructure provision – 15%
- Rex Morpeth Park upgrade – 10%
- Under 10%:
 - Specific plans / policies / strategies
 - Boat harbour / wharf / waterfront issues
 - LTP engagement
 - Events / tourism / regional promotion
 - Reduced rates increase / rates rebate

Approved

- Rates / Council spending – 43% (18% in 2023)
- Roading / roundabout / layout changes / speed limits – 24%
- Boat harbour / wharf / waterfront development – 13%
- Under 10%:
 - Rex Morpeth park / Memorial Hall upgrade
 - Council building upgrade
 - Council communication / democracy / members
 - Maintenance / repairs / infrastructure provision
 - Insufficient / lack of service provision
 - Lack of second bridge
 - Tidal pool / Heads development
 - Long Term Plan
 - Water management / bottling
 - Consents process / delays
 - No comment
 - Pathways
 - Strand / CBD / parking development / other projects

Disapproved