



# Finance and Performance Committee

## *Te Komiti Pūtea Mahi*

Thursday, 28 August 2025

*Rāpare, 28 Hereturikōkā 2025*

Totara Room, Whakatāne District Council  
14 Commerce Street, Whakatāne  
Commencing at 9:00 am



Chief Executive: Steven Perdia | Publication Date: 22 August 2025

[whakatane.govt.nz](http://whakatane.govt.nz)





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**A Membership - *Mematanga***

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Mayor Dr Victor Luca

Councillor Julie Jukes - Chairperson

Deputy Mayor Lesley Immink - Deputy Chairperson

Councillor Toni Boynton

Councillor Gavin Dennis

Councillor Andrew Iles

Councillor Wilson James

Councillor Tu O'Brien

Councillor John Pullar

Councillor Nándor Tánczos

Councillor Ngapera 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.

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**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***

No apologies have been received at the time of compiling the agenda.

**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*****4 Conflicts of Interest - *Ngākau kōnatunatu***

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](#)

Members are reminded of the need 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. Elected Members are also reminded to update their register of interests when changes occur.

**Financial Conflict**

- Members present must declare any direct or indirect financial interest that they hold in any matter being discussed at the meeting, other than an interest that they hold in common with the public.
- Members cannot take part in the discussion, nor can they vote on any matter in which they have a direct or indirect financial interest, unless with an approved exception.
- Members with a financial interest should physically withdraw themselves from the table. If the meeting is public excluded, members should leave the room.

**Non-Financial Conflict**

- If a member considers that they have a non-financial conflict of interest in a matter they must not take part in the discussions about that matter or any subsequent vote.
- Members with a non-financial interest must leave the table when the matter is considered but are not required to leave the room.

**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***

The minutes from the Council meeting held on Thursday, 15 May 2025 can be viewed via the Council website. Click on the link below in order to view the 'unconfirmed minutes'.

- [Finance and Performance Committee minutes - 15 May 2025](#)

**6.1 Actions**

6.1 Actions

Council & Committee Meeting Actions

smartsheet

Meeting Date	Subject	Task Name	Due Date	General Manager	Status	Comments
28/11/24	Wairaka Centennial Park	Staff to report back to Council regarding the Wairaka Centennial Park and the improvement work previously identified as required to alleviate the debris buildup at the rock formation.	27/02/25	Hone Patrick	Complete	The remedial work at the Wairaka Steps was completed in December 2024. The purpose of this work was to improve accessibility for our community and reduce debris build up. The works have largely addressed these issues however ongoing cleaning work is required to keep the area fully free from debris.
28/11/24	Pool heat pump replacement at Murupara Aquatics centre	Clarification required as to whether the Murupara aquatics centre pool heat pump replacement was scheduled for a replacement of for repairs	27/02/25	Hone Patrick	Complete	The Murupara heat pump has been repaired and is now fully functional.
28/11/24	Airport Debt	Staff to confirm if the Council is entitled to receive interest from the ministry on the outstanding airport debt.	27/02/25	Hone Patrick	Complete	MoT confirmed that in this case it would be unlikely that we would get interest, they have paid interest in the past when payments from the Ministry have been delayed. But this was an exception rather than the norm as the JV Deed does not reference interest on any outstanding arrears.
28/11/24	Water supply monitoring - health impacts	It was requested that staff examine if there is a measurable impact on health and the associated consequences of disease burdens as part of the water supply monitoring.	27/02/25	David Bewley	Complete	No health impact have been identified to date there would be health impact if one or more of our water supplies were to experience a protozoal incident, i.e. Giardia and Cryptosporidium. Symptoms from intestinal protozoa include diarrhea, dysentery and other health problems. Council has great water supplies which we treat and manage to delivery safe drinking water to our communities. Some of the performance measures that we have not met are based on systems data and others on treatment process. Where it is related to the treatment process, we have planned improvements to address or we have already addressed these but where it is system data, these are more difficult to achieve and we will still have 'not-met' under these circumstances. Council works closely with our regulators in reporting all incidents and to ensure we provide safe drinking water to our communities and meet our regulatory obligations
28/11/24	Organisational performance	Staff were instructed to provide for long term historical trends within the performance graphs provided within this report.	27/02/25	Emlyn Hatch	Complete	The Org Performance Framework report is designed to provide Clirs with a snapshot of info to give them an idea of how the org is performing. long term trends will not align with this purpose.
28/11/24	Cyber Security training	Councillors requested statistics to Councillors' completion rate of the Cyber Security training.	27/02/25	Emlyn Hatch	Complete	The councillors have not been included in our recent cybersecurity training. All councillors will be added to all future trainings from now on. Please note that, Mayor Victor Luca was included in past trainings as his account had been configured slightly differently to our councillors.
27/02/25	Unresolved and ongoing building matter	Mrs. Bronwyn Donaldson - 376 Ocean Road Ohope. Staff to provide elected members with an update in relation to progress regarding this ongoing matter.	28/08/25	David Bewley	Complete	There is no resource consent requirement on respect of any matter associated with the retaining wall between the two properties or in relation to any current use of the neighbouring property. The provision of fall protection at the top of the 1.3m high wall is not able to be enforced under the Building Act 2004 due to the 12 month limitation under s378 Building Act 2004 which expired in December 2020. Any disagreement between the two land owners concerning the retaining wall is a property law matter between the two parties and does not involve Council in any way.
15/05/25	Financial Reporting as at 31 March 2025	Clarification was requested on whether the decline in building consents had resulted in cost savings due to reduced reliance on contracted building inspectors	28/08/25	Justin McGeough	Complete	For the period ending Q3, the number of building consents processed decreased slightly (-6.32%), while the value of work increased modestly (+5.3%). Neither of these movements materially contributed to budgeted income being lower than forecast. [The primary reason for the variance is likely the progressive increase in budget forecasts, which have not been fully aligned with actual consent volumes and values. In addition, fees and charges have remained relatively static, without adjustments to account for the stable consent numbers compared with forecast income. It should also be noted that consent costs, and therefore income, are influenced by factors beyond volumes and values alone.]  Contractor use remains cost-neutral, as actual charges are invoiced directly to customers and captured within our fees and charges budget. Where consents are processed in-house, the cost is offset by our remuneration budget. Our ability to retain consents for internal processing has only been established within the past six months; it is therefore too early to confirm whether this will have any material impact on the overall budget position.
15/05/25	Financial Reporting as at 31 March 2026	No forecast for the Tāneatua School Hall refurbishment had been included in the report. Staff were asked to provide councillors with a progress update on the project, including expected timelines and funding status.	28/08/25	Justin McGeough	Complete	Our contribution to this project was \$69,500.00 and we have not further involvement as it is a MOE project. MOE have advised they are in the process of setting up an new lead designer for ongoing work and the contract for this is still being finalised.
15/05/25	Financial Reporting as at 31 March 2027	Staff were requested to report back to the committee with the actual cost and revenue associated with the Valley Road Tree Harvesting project.	28/08/25	Justin McGeough	Complete	The cost for this project was \$488,730.00 taking into consideration revenue from the stumpage.
15/05/25	Financial Reporting as at 31 March 2028	Additional explanation was requested to clarify variances for activities where the forecast was lower than budgeted, particularly those outlined in Section 4.3 on page 13.	28/08/25	Justin McGeough	Complete	This is explained in the Q4 reporting report at the F&P meeting on 28 August 2025
15/05/25	Health, Safety & Wellbeing Report 1 January – 31 March 2025	Page 23 'Workers who completed required external training'. The committee requested clarification to the type of external training the 39 workers completed.	28/08/25	Emlyn Hatch	Complete	Emlyn Hatch provided information and statistics directly to Councillors via email on 7 August 2025
15/05/25	Health, Safety & Wellbeing Report 1 January – 31 March 2026	A breakdown of external training completed by staff and full metric reporting was requested to be included in future reporting.	28/08/25	Emlyn Hatch	Complete	Emlyn emailed Clirs on 7/8/25.
15/05/25	Organisation Performance Report - Quarter 3 2024/25	Staff to include comparative data from previous quarters in future cyber security reporting to support trend analysis and performance tracking.	28/08/25	Leny Woolsey	Complete	The percentage of staff to complete cyber security training over the last 6 quarters: - 31% Q2 2023/24 - 41% Q3 2023/24 - 35% Q4 2023/24 - 37% Q1 2024/25 - 48% Q2 2024/25 - 48% Q3 2024/25 Staff will continue to monitor and report on completed cyber security training.
15/05/25	Long-Term Plan Non-Financial Performance Reporting, Quarter 3 2024/25	Staff were to provide clarification on the rationale behind the 60% target measure related to user satisfaction with Council's resource consent process.	28/08/25	Leny Woolsey	Complete	The resource consenting process is a significant activity within Council, and it is important to understand and monitor the level of customer satisfaction. The 60% target was reviewed and set with Councillors during the development and adoption of the LTP 24/34 and was set as a 'realistic target' as opposed to an 'aspirational target'. This key performance indicator has a 65% year to date result; however the low number of customer responses means it is difficult to accurately measure the level of user satisfaction over the year (e.g. Q3 2024/25 had a nil return from customers). It should be noted that this measure is complementary to another non-financial performance measure relating to the 'Percentage of non-notified resource consents processed within statutory timeframes'.

## 7 Reports - *Ngā Pūrongo*

### 7 Reports - *Ngā Pūrongo*

#### 7.1 Resident Survey 2024-25 Report



To: **Finance and Performance Committee**

Date: **Thursday, 28 August 2025**

Author: **A Naidoo / Strategic Policy Analyst**

Authoriser: **L Woolsey / General Manager Strategy and Growth**

Reference: **A2948312**

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

The purpose of this report is to provide the Finance and Performance Committee (the Committee) with the Resident Survey results for the full 2024/25 financial year (1 July 2024 – 1 July 2025).

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 Residents Survey 2024-25 report is attached as Appendix 1.

#### 2. Recommendation - *Tohutohu akiaki*

THAT the Finance and Performance Committee **receive** the Resident Survey 2024-25 Report.

#### 3. Background - *He tirohanga whakamuri*

Whakatāne District Council commissions a Resident Survey every quarter to determine levels of satisfaction with Council's services, communications, and management, and to identify opportunities for improvement. The survey is 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. This cover report summarises all quarters of the 24/25 year to July 2025.

This report aims to highlight Council's overall performance and areas which have had the most significant changes outside of the margins of error, particularly in comparison to the previous years (2023/24) overall score.

Key considerations when reading the report:

- Due to the small sample size (150 per quarter) and limitations around the methodology for data collection the margin of error should also be considered.
- Where applicable, results are compared with a New Zealand Benchmark Survey which has a sample size of 400.

**7.1 Resident Survey 2024-25 Report(Cont.)****4. Discussion – Kōrerorero****4.1. Summary of Findings**

Overall resident satisfaction with Whakatāne District Council services remained broadly consistent with the previous year, with some longer-term downward trends in some areas. The context of sustained economic pressures – especially in terms of cost of living increases and rising rates – may influence perceptions of Council performance, particularly in areas linked with financial management and governance.

Overall, about half of residents (49%) surveyed in the Whakatāne District were satisfied with services received from Council over the 2024-25 year, similar to the 2023-24 result of 53%, and on par with the New Zealand national and district council benchmark (50%).

While satisfaction with many core services remains strong (with 62% of services rated at or above 60%), and in many cases at or above national benchmark levels, notable declines were seen in areas such as noise control, dog control, and business promotion.

Remaining fairly consistent over recent years, the five highest rated services by survey respondents were the Whakatāne Exhibition Centre, Kerbside Waste Collection, Whakatāne Crematorium, Sports Fields, and the Whakatāne Museum and Research Centre.

Services with declining levels of resident satisfaction, reflecting the five lowest-rated services were Noise Control, Dog Control, Business Promotion, Event Promotion and Tourism Promotion.

Furthermore, satisfaction with Council leadership, communication, and financial management dropped significantly, reflecting growing concerns about transparency and value for money in a fiscally sensitive environment.

**4.1.1. Overall Performance**

	<b>2024-25 Result (1 July 2024 – 30 June 2025)</b>	<b>New Zealand Benchmark Survey</b>	<b>Previous Year Result</b>	<b>Margin of Error</b>
<b>Overall Performance</b>	<b>49%</b> 2024/25	<b>50%</b> NZBS (both District and Local Council average)	<b>53%</b> 2023/24	<b>4%</b> Margin of error
<b>Management Comment</b>	<p>Whilst overall satisfaction with Council's performance has declined from previous years, it is on par with both the New Zealand national and District Council benchmarking average figures.</p> <p>18 out of 29 Council Services rated by Whakatāne District residents achieved satisfaction ratings of 60% or above, with 6 services achieving 80% satisfaction or higher.</p> <p>N.B This is no longer an LTP measure.</p>			

**7.1 Resident Survey 2024-25 Report(Cont.)****4.1.2. Services that are tracking well**

The following areas tracked well over the last year.

	2024-25 Result (1 July 2024 – 30 June 2025)	New Zealand Benchmark Survey	Previous Year Result	Margin of Error
Whakatāne Exhibition Centre	86% YTD	67% NZBS	73% 2023/24	7% Margin of Error
Kerbside Waste Collection	83% YTD	74% NZBS	77% 2023/24	8-9% Margin of Error
Whakatāne Crematorium	83% YTD	67% NZBS	89% 2023/24	3% Margin of Error
Whakatāne Museum and Research Centre	82% YTD	N/A	73% 2023/24	8% Margin of Error
Sports Fields	82% YTD	74% NZBS	77% 2023/24	5% Margin of Error

**4.1.3. Services to monitor**

The following areas need to be monitored. It is noted in the SIL Report that these service areas are typically among the least used/accessed, consequently with lower resident knowledge with wider variations in satisfaction scores.

	2024-25 Result (1 July 2024 – 30 June 2025)	New Zealand Benchmark Survey	Previous Year Result	Margin of Error
Noise Control	24% YTD	N/A	26% 2023/24	19% Margin of Error
Management Comment	<p>Variability in satisfaction with noise control is evident over time due to low sample sizes and greater margins of error reducing comparability. Additionally, relatively few residents (4%) contact the Council about noise issues. Staff have noted and identified specific areas or properties that continue to receive multiple RFS for after-hours noise complaints. Once an address in question has been identified, staff visit these properties to discuss ongoing issues. As a result, some of the RFS relating to those specified properties have stopped.</p> <p>Whilst the perception of noise control results in a Year-to-Date average result of 24%, there are limitations within current legislation in how we respond to this measure. After hour contractors are also being met with a level of hostility when attending certain jobs which may be a prevalent factor.</p>			

**7.1 Resident Survey 2024-25 Report(Cont.)**

	<b>2024-25 Result (1 July 2024 – 30 June 2025)</b>	<b>New Zealand Benchmark Survey</b>	<b>Previous Year Result</b>	<b>Margin of Error</b>
<b>Dog Control</b>	<b>29% YTD</b>	<b>57% NZBS</b>	<b>40% 2023/24</b>	11% Margin of Error
<b>Management Comment</b>	Alongside the review of the Dog Policy and Bylaw an education campaign targeting the general community and schools is planned. This may include providing more information to the public around the knowledge of this service, as well as encouraging anyone experiencing issues relating to dog control to contact the Council, rather than through other forums such as social media. Two new Animal Control Officers who started in Q2 and Q4 2024-25 will also provide more time patrolling areas.			
<b>Business Promotion</b>	<b>37% YTD</b>	<b>N/A</b>	<b>52% 2023/24</b>	5% Margin of Error
<b>Tourism Promotion</b>	<b>47% YTD</b>	<b>N/A</b>	<b>52% 2023/24</b>	5% Margin of Error
<b>Event Promotion</b>	<b>49% YTD</b>	<b>61% NZBS</b>	<b>56% 2023/24</b>	5% Margin of Error
<b>Management Comment</b>	<p>The District's economic development function has recently moved from Toi-EDA to Council. It is anticipated that economic development will improve with this becoming core council business. The development of an action plan will be the first stage in growing this function. It should be noted that the promotion of individual businesses is not Council's function and there is an opportunity to revisit that measure in the next LTP development.</p> <p>Community sentiment towards tourism and events dropped over the past year although support for Council investment in these areas remains strong. Just under a third of respondents believe Council should spend more on tourism and events promotion and around 40% consider investment should remain the same. Furthermore, Tourism and Events promotion ranks reasonably highly by respondents in terms of spending priorities for Council, indicating the value that Tourism and Events bring to the District.</p> <p>Sentiment in relation to tourism has declined nationwide, and heightened economic challenges may account for this decline. The Tourism and Economic Development Team will continue to plan and deliver a variety a high-quality events and tourism opportunities to attract locals and visitors.</p>			

**5. Options Analysis - Ngā Kōwhiringa**

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

**7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report****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.

**6.2. Engagement and Community Views**

Engagement on this matter is not being undertaken in accordance with Section 6.0 of the Council's Significance and Engagement Policy. This states that the Council will not consult when the Council already has a sound understanding of the views and preferences of the persons likely to be affected or interested in the matter.

**7. Considerations - *Whai Whakaaro*****7.1. Strategic Alignment**

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

**7.2. Legal**

No legal requirements have been identified.

**7.3. Financial/Budget Considerations**

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

**7.4. Climate Change Assessment**

There are no significant or notable impacts associated with the matters of this report.

**7.5. Risks**

There are no significant or notable risks associated with the matters of this report.

**8. Next Steps – E whai ake nei**

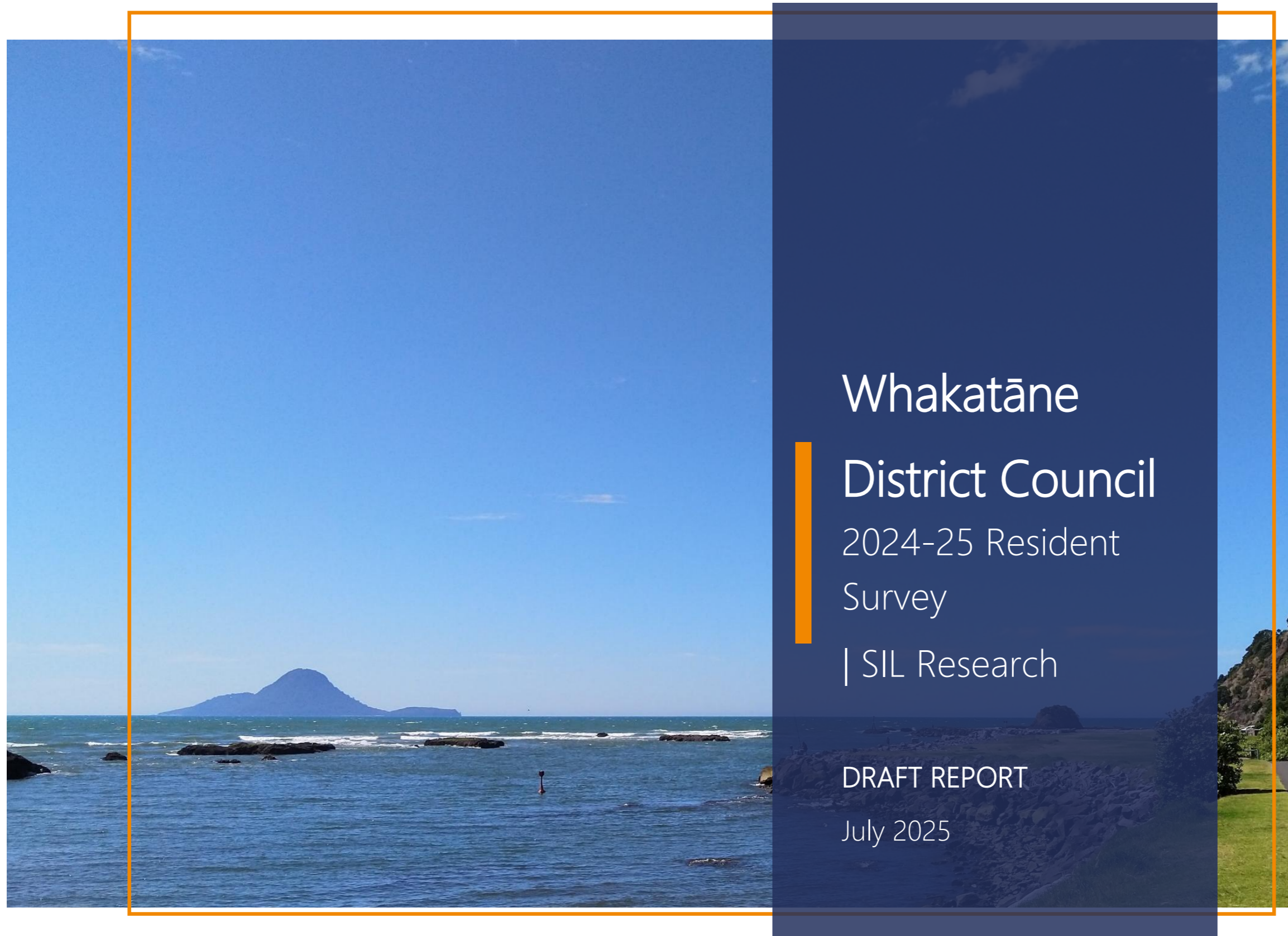
All of the Long-Term Plan measures in the Resident Satisfaction Survey will be reported in the Council's Annual Report 2024-25.

**Attached to this Report:**

- Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report

**7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report**

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)



**7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)**

Contact: Dr Virgil Troy 06 834 1996 or [virgiltroy@silresearch.co.nz](mailto:virgiltroy@silresearch.co.nz)

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7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

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7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

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Public swimming pools .....	24	Kerbside waste collection service .....	41
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Footpaths .....	26	Council roads overall.....	43
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7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(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 2024-25 year (data collected between October 2023 and June 2024). A total of n=600 surveys were used in the final analysis. The 2025 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.

Considering the importance of national and regional contextual conditions, and the impact these play on local experiences, remains necessary when evaluating satisfaction levels and ability of the Council to meet its community’s needs in 2024-25. Many critical factors have had a notable and ongoing impact in recent years, and the influence of these conditions continues to be felt across the community: the cost of living in New Zealand; a propensity for local Whakatāne District residents to feel ongoing financial pressure; increasingly conscious responses to personal financial impacts and wider District-wide civic spending. In this context, Council spending and financial management remain at the forefront of residents’ minds, with rates increases and general value for money a persistent concern – the relative priorities of Council spending decisions become more 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 current year has seen Whakatāne District Council continuing to operate in an environment marked by these and other challenging factors; taken together, these factors have played a notable influence on the community and potentially influenced residents’ perceptions of Council performance.

The main findings in 2025 were as follows:

- 1

Overall, about half of residents (49%) were satisfied with services received from the Whakatāne District Council over the 2025 year. While similar to 2024 (53%), current overall satisfaction has declined from previous years (lower than 61% in 2023) – despite remaining on par with both the New Zealand national (50%) and district council (50%) benchmarking average figures.
- Supporting these overall perceptions, 18 out of 29 Council services (62%, also 62% in 2024) rated by Whakatāne District residents achieved satisfaction ratings of 60% or above, with 6 services achieving 80% satisfaction or higher.



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

- Across the 2025 survey year, the five top-rated services were the Whakatāne Exhibition Centre (86% satisfaction), kerbside waste collection (83%), Whakatāne crematorium (83%), sports fields (82%) and the Whakatāne Museum and Research Centre (82%) – this top five has remained fairly consistent in recent years.
- In contrast, the five lowest-rated services in 2025 (all below 50% satisfaction) were: noise control (24%), dog control (29%) and three areas aimed at promoting the local district - business promotion (33%), event promotion (45%), and tourism promotion (47%).
- Playing a detrimental role on overall satisfaction, several services saw declines in satisfaction in the current year. The largest drops among users in 2025 were measured for the aforementioned noise control (-32 points), business promotion (-19 points), dog control (-11 points), and event promotion (-10 points). These service areas are typically among the least used/accessed, consequently with lower resident knowledge and subject to greater variations in satisfaction scores.
- In contrast, increased satisfaction in 2025 was measured for cemeteries (+11 points), sports fields (+5 points) and public toilets (+5 points).

2 3-in-4 residents (75%) in 2025 agreed (somewhat or strongly) that the Whakatāne District is generally a safe place to live. While remaining above the New Zealand Benchmarking Survey result of 53%, this continues a gradual decline in safety perceptions in recent years, with the proportion who agreed they feel ‘safe’ (currently 62%) falling to its lowest level since 2019-20 (76%). Just over half (54%) of residents in 2025 believed the quality of their life was ‘good’ to ‘very good’ – this has also been subject to falling perceptions in recent years (from 76% in 2020).

- In this context, residents in 2025 were again less inclined to recommend Whakatāne District as a place to live (NPS - 25%) – the second consecutive year of negative net recommendation (from -16% in 2024) while continuing a longer declining trend over recent years. In addition, the propensity to recommend the District as a holiday destination also fell into negative territory in 2025 (anecdotal NPS -8%), following decline positivity in recent years.
- Contact with specific Council representatives increased slightly in 2025 compared to 2024. Almost half (46%) of residents had contacted the customer service front desk (up from 36% in 2024, and 30% in 2023), with 73% satisfied with this contact (similar to 2024). While only 15% had contact with a Community Board Member, this was up slightly

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

from 2024 (10%), with 80% satisfied. Overall, half (50%) of all residents stated they had contacted the Council in 2025 (46% in 2024) – the highest rate since 2021; although satisfaction was lower (48%) for these residents.

- Community engagement remained positive in 2025 – overall and across specific activities – with half (51%) of respondents engaging with Council in some way (54% in 2024, but up from 43% in 2023 and 40% in 2022). Most typically, engaged residents reported talking to Council reps at public events (39%, compared to 25% in 2024), or providing feedback on social media (36%, 37% in 2024). However, the increase in residents who report making a formal submission continued this year (36%, up from 29% in 2024, and 21% in 2023) – possibly reflecting engagement with a range of Council-led consultations. Engagement overall remained more likely for younger residents (under 65 years).
- ‘*Social media*’ remained the most preferred method of Council communication in 2025; for 60% of residents overall, and 79% of 18-39 year olds; with an ongoing increase among older residents (65 or older) – 33% in 2025, from 30% in 2024, and 14% in 2023. Traditional media (e.g. newspaper, radio) remained important, especially for older residents.

3 The decreases in satisfaction across a range of services in 2025 were particularly reflected in more negative sentiment around Council governance – in terms of communication, leadership and management. Each of these areas saw marked declines in satisfaction this year, overall and across specific attributes. Overall, 30% of residents were satisfied with Council’s communication and consultation with the public – significantly below 42% in 2024 (similar to 2023). ‘*Listening to and acting on the needs of the people*’ (22%) remained the least satisfactory communication attribute (falling to a new low from 27% in 2024 and 35% in 2022). However, all other communication attributes also fell this year; ‘keeping people informed’ (43%) still elicited the greatest satisfaction, but below 2024 levels (52%) and earlier.

- Satisfaction with Council leadership saw an overall drop in 2025 (29%, from 36% in 2024 and 44% in 2023) – with similar falls in terms of mayoral (37%) and councillor leadership (26%), and strategies for developing prosperity and wellbeing (24%). Overall satisfaction with Council’s day-to-day business management also declined to 29% (from 33% in 2024, 46% in 2023) – perceptions of Council financial management were particularly low, as even fewer residents in 2025 expressed trust in WDC’s management around making good spending decisions (18%), value for money (17%), and managing finances well (15%).



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

In 2025, overall resident satisfaction with Whakatāne District Council services remained broadly consistent with the previous year, although it continues a longer-term downward trend from earlier periods in some key areas. The context of sustained economic pressures - especially around cost of living and rising rates - appears to be influencing more critical perceptions of Council performance, particularly in areas tied to financial management and governance. While satisfaction with many core services remains strong (with 62% of services rated at or above 60%) – and in many cases at or above national benchmark levels - notable declines were seen in lower engagement areas such as noise control and business promotion. Furthermore, satisfaction with Council leadership, communication, and financial management dropped significantly, reflecting growing concerns about transparency and value for money in a fiscally sensitive environment.

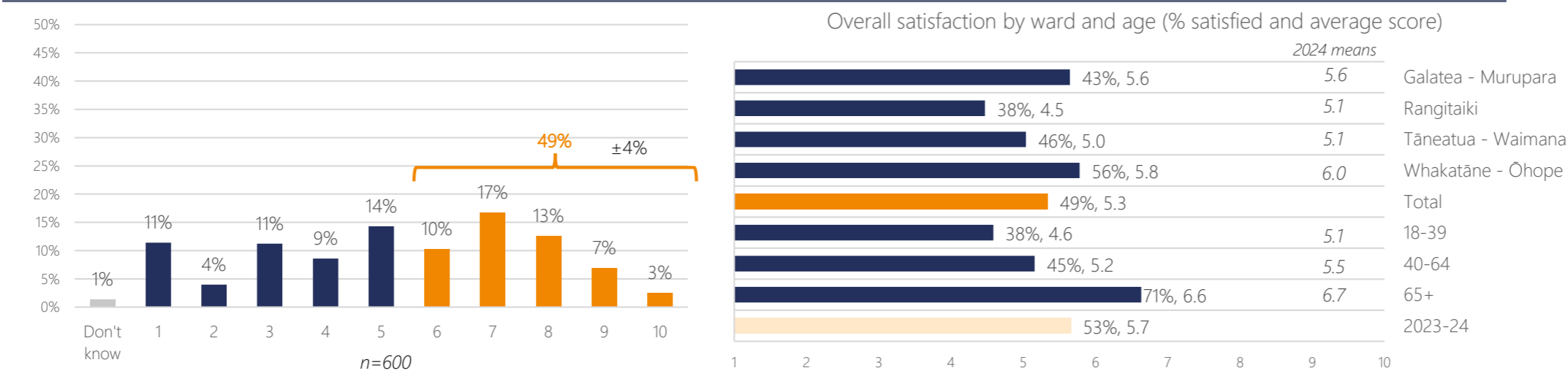
Given the current climate, improving resident satisfaction will require the Council to prioritise visible, cost-effective service delivery and strengthen community trust in its governance. Clearer, more transparent communication - particularly regarding how and why spending decisions are made - will be critical. This should include enhanced engagement on priority setting and better feedback loops, especially as reported formal submission rates are rising. Continued emphasis on effective communication through social media and targeted efforts to reach diverse age groups through a robust channel mix can help bridge gaps. Rebuilding confidence in Council leadership will also require a renewed focus on responsiveness, accountability, and inclusive decision-making to align civic planning more closely with the financial realities residents are facing. Targeted attempts to boost promotion of the District internally and externally – through business, event and tourism promotion – may encourage a renewed sense of positivity and a pathway to grow confidence in the economic prospects of the region moving forward.

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

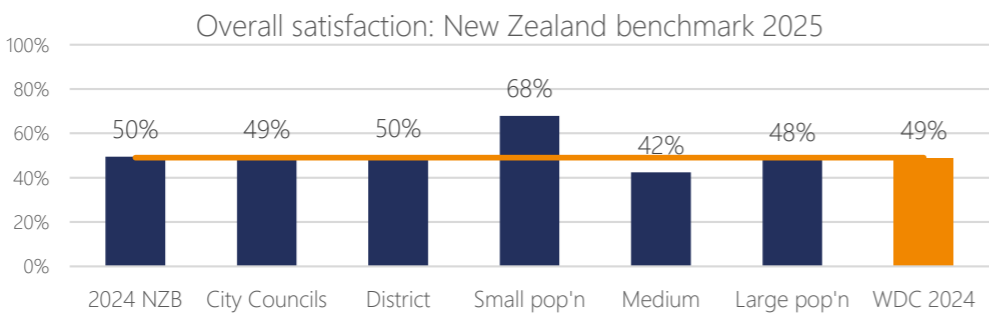
OVERALL SATISFACTION WITH THE COUNCIL

Overall satisfaction with services received from the Whakatāne District Council

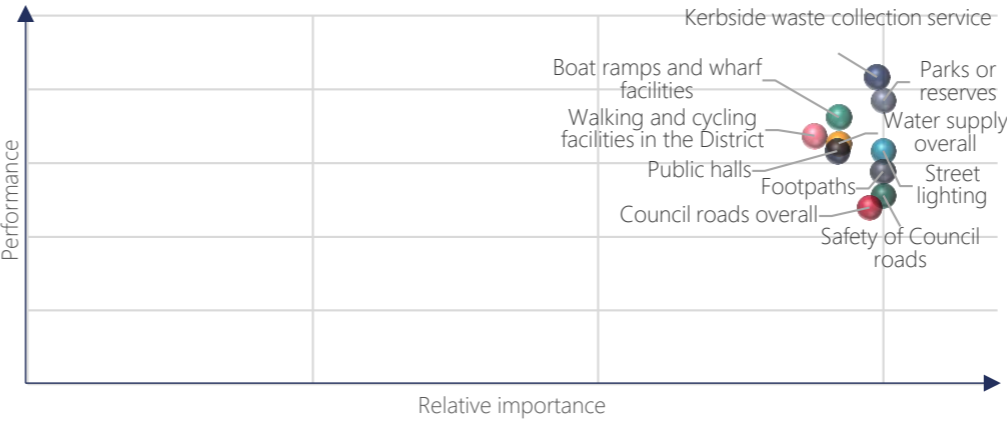
LTP MEASURE



- In 2025, half of residents (49%) were satisfied with overall services received from the Whakatāne District Council (on average rating 5.3 out of 10).
- The current result was similar to 2024 (53%, average 5.7 rating) but showed decline from previous years, including 2023 (61% satisfied, average 6.1 rating). However, the current result was on par with both the national (50%) and District Council (50%) benchmark averages.
- Residents aged under 65 remained less satisfied overall than older residents (aged 65+), although satisfaction ratings across age groups were only slightly lower compared to 2024 – but significantly lower than 2023.
- Satisfaction differed significantly by area, remaining highest in Whakatāne than in other areas, and lowest in Rangitakei in 2025. Satisfaction levels saw some recovery in Tāneatua-Waimana in 2024-25 (46%) compared to 2024 (34%).
- Out of all services surveyed, ten showed stronger influence on overall satisfaction.
- Assessing relative importance (strength of relationship) against measured performance of these ten services, Council roads, footpaths, street lighting and water supply represented the greatest improvement opportunity (with significant importance but relatively low performance).




2024-2025 WHAKATĀNE DISTRICT COUNCIL RESIDENT SURVEY - SIL RESEARCH | 9



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION AT A GLANCE

























Overall satisfaction

WDC 2025: 49% / 5.3





















WDC 2024: 53% / 5.7

NZB 2025: 54% / 5.5

 <div>LTP MEASURE</div> Waste collection service	 <div>LTP MEASURE</div> Art and culture <sup>1</sup>	 <div>LTP MEASURE</div> Cemeteries <sup>2</sup>	 <div>LTP MEASURE</div> Recreation facilities <sup>3</sup>	 <div>LTP MEASURE</div> Refuse transfer station	 <div>LTP MEASURE</div> Swimming pools
WDC 2025: 83% / 7.7	WDC 2025: 83% / 8.0	WDC 2025: 81% / 7.9	WDC 2025: 76% / 7.1	WDC 2025: 76% / 7.1	WDC 2025: 76% / 6.8
WDC 2024: 89% / 8.2	WDC 2024: 81% / 8.1	WDC 2024: 77% / 7.6	WDC 2024: 76% / 7.1	WDC 2024: 78% / 7.4	WDC 2024: 77% / 6.9
NZB 2025: 67% / 6.5	NZB 2025: 78% / 7.5	NZB 2025: 78% / 7.3	NZB 2025: 75% / 7.0	NZB 2025: 64% / 6.5	NZB 2025: 56% / 6.1
 <div>LTP MEASURE</div> Sewerage	 <div>LTP MEASURE</div> Wharf facilities	 <div>LTP MEASURE</div> Stormwater	 <div>LTP MEASURE</div> Walking and cycling	 <div>LTP MEASURE</div> Street lighting	 <div>LTP MEASURE</div> Public halls
WDC 2025: 74% / 7.3	WDC 2025: 72% / 6.8	WDC 2025: 68% / 6.6	WDC 2025: 67% / 6.6	WDC 2025: 63% / 6.2	WDC 2025: 63% / 6.6
WDC 2024: 75% / 7.5	WDC 2024: 72% / 7.0	WDC 2024: 65% / 6.6	WDC 2024: 71% / 6.9	WDC 2024: 69% / 6.5	WDC 2024: 67% / 6.7
NZB 2025: 74% / 7.0	NZB 2025: n/a	NZB 2025: 51% / 5.4	NZB 2025: 52% / 5.8	NZB 2025: 64% / 6.3	NZB 2025: n/a
 <div>LTP MEASURE</div> Water <sup>4</sup>	 <div>LTP MEASURE</div> Footpaths	 <div>LTP MEASURE</div> Public toilets	 <div>LTP MEASURE</div> Parking	 <div>LTP MEASURE</div> Roads <sup>5</sup>	 <div>LTP MEASURE</div> Tourism
WDC 2025: 60% / 6.2	WDC 2025: 58% / 6.0	WDC 2025: 55% / 5.9	WDC 2025: 52% / 5.5	WDC 2025: 50% / 5.4	WDC 2025: 47% / 5.4
WDC 2024: 63% / 6.4	WDC 2024: 56% / 5.9	WDC 2024: 50% /	WDC 2024: 60% / 5.9	WDC 2024: 50% / 5.4	WDC 2024: 52% / 5.7
NZB 2025: 62% / 6.3	NZB 2025: 55% / 5.7	NZB 2025: 69% / 6.7	NZB 2025: 51% / 5.5	NZB 2025: 43% / 4.9	NZB 2025: n/a
 <div>LTP MEASURE</div> Promoting events	 <div>LTP MEASURE</div> Business promotion	 <div>LTP MEASURE</div> Dog control	 <div>LTP MEASURE</div> Noise control	<div><div></div><div>- Good performance (70% and above)</div><div></div><div>- Services with positive performance (at least 50% but below 70%)</div><div></div><div>- Services for improvement</div><div></div><div>- Overall performance indicators</div><div>LTP MEASURE</div><div>- Long Term Plan measure</div></div>	
WDC 2025: 45% / 5.3	WDC 2025: 33% / 4.6	WDC 2025: 29% / 4.1	WDC 2024: 24% / 3.5		
WDC 2024: 56% / 5.8	WDC 2024: 52% / 5.5	WDC 2024: 40% / 4.7	WDC 2024: 56% / 5.7		
NZB 2025: 61% / 6.3	NZB 2025: n/a	NZB 2025: 57% / 5.7	NZB 2025: n/a		

Aggregated average ratings for: <sup>1</sup> libraries, Whakatāne Exhibition Centre and Whakatāne museum; <sup>2</sup> cemeteries and crematorium facilities; <sup>3</sup> parks or reserves, sports fields and playgrounds; <sup>4</sup> water supply and quality; <sup>5</sup> roads and road safety.

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

 Keeps people informed	 Provides sufficient opportunities for people to have their say	 Leadership of Mayor	 Makes it easy for people to transact with Council	 Makes it easy for people to interact and engage
WDC 2025: 43% / 4.9	WDC 2025: 38% / 4.7	WDC 2025: 37% / 4.7	WDC 2025: 36% / 4.6	WDC 2025: 35% / 4.5
WDC 2024: 52% / 5.5	WDC 2024: 46% / 5.2	WDC 2024: 42% / 5.0	WDC 2024: 44% / 5.1	WDC 2024: 44% / 5.0
NZB 2025: 46% / 5.1	NZB 2025: 43% / 4.9	NZB 2025: 45% / 4.8	NZB 2025: n/a	NZB 2025: 43% / 4.9
 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 2025: 30% / 4.3	WDC 2025: 27% / 4.0	WDC 2025: 26% / 3.9	WDC 2025: 25% / 3.9	WDC 2025: 24% / 3.8
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
NZB 2025: 43% / 5.0	NZB 2025: 41% / 4.7	NZB 2025: 39% / 4.5	NZB 2025: 38% / 4.5	NZB 2025: 33% / 4.1
 Efficiency and effectiveness	 Continual performance improvement	 Listens to and acts on the needs of the people	 Trust to make good spending decisions	 Value for money
WDC 2025: 22% / 3.5	WDC 2025: 23% / 3.8	WDC 2025: 22% / 3.4	WDC 2025: 18% / 2.9	WDC 2025: 17% / 3.2
WDC 2024: 30% / 4.1	WDC 2024: 30% / 4.1	WDC 2024: 27% / 3.9	WDC 2024: 20% / 3.4	WDC 2024: 22% / 3.5
NZB 2025 35% / 4.3	NZB 2025: 33% / 4.1	NZB 2025: 31% / 4.0	NZB 2025: 30% / 3.7	NZB 2025: 30% / 3.9
 Managing finances well	 <small>LTP MEASURE</small> Customer Service front desk	 Overall performance in managing day-to-day business	 Overall performance in terms of communication	 Overall performance in terms of leadership (Mayor and Councillors)
WDC 2025: 15% / 2.9	WDC 2025: 73% / 7.0	WDC 2025: 29% / 4.0	WDC 2025: 30% / 4.3	WDC 2025: 29% / 4.1
WDC 2024: 19% / 3.3	WDC 2024: 73% / 7.3	WDC 2024: 33% / 4.4	WDC 2024: 42% / 4.9	WDC 2024: 36% / 4.5
NZB 2025: 28% / 3.7	NZB 2025: n/a	NZB 2025: 37% / 4.5	NZB 2025: 37% / 4.5	NZB 2025: 37% / 4.4

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(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.

RESEARCH PROCESS

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 2024-25 survey year, the data was collected from September (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.

CHANGES IN 2024-25

While the questionnaire remained unchanged in 2024-25 to ensure consistency and comparability with previous years, changes were made to how some service measures were analysed – specifically, how measures were combined into service groups for quarterly tracking purposes. As such, the following adjustments were made to service groups in 2024-25:

- ‘Recreation facilities’ – ‘Boat ramps and wharf facilities’ was removed from Quarter 1 2024-25 (the service group now includes ‘Parks or reserves’, ‘Playgrounds’ and ‘Sports fields’).
- ‘Community facilities’ – this service group was removed from Quarter 1 2024-25 (previously included ‘Public toilets’, ‘Public halls’, ‘Crematorium’, ‘Cemeteries’).

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

- ‘Cemeteries & Crematorium facilities’ – this service group was introduced from Quarter 1 2024-25.

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.

A total of n=150 surveys were used in the final analysis each quarter, providing a combined annual sample of n=600 for the 2024-25 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	13 (2%)	8%
Rangitāiki	168 (28%)	27%
Tāneatua - Waimana	41 (7%)	10%
Whakatāne - Ōhope	378 (63%)	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. The 2018 Census population benchmarks were used in 2024-25 because the latest 2023 Census figures were not available until later in the 2024-25 year; 2018 figures were used by necessity from the start of the

year’s data collection and retained throughout 2024-25 for consistency. The 2023 Census benchmarks will be used from the start of the 2025-26 survey year.

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.

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. Based on the Whakatāne district’s population, the maximum margin of error for the annual sample of n=600 is +/- 4%. The margin of error varies based on the number of responses for each service area and depends on general awareness/knowledge about each service. Higher proportions of ‘Don’t know’/‘Don’t receive this service’ responses reduce the effective sample sizes and result in a larger margin of error.

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

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. R<sup>2</sup> 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 R<sup>2</sup> 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.

Due to rounding, figures with percentages may not add to 100%. Reported percentages were calculated on actual results not rounded values.

RESPONDENT PROFILE

Table 1 Responses by age

	Frequency	Percent
18-39	182	30.9
40-64	266	45.0
65+	142	24.1
Total	590	100.0

Table 2 Responses by time lived in the District

	Frequency	Percent
Less than 1 year	11	1.9
1 year to just under 2 years	19	3.3
2 years to just under 5 years	41	6.9
Five years to just under 10 years	59	9.9
10 years or more	455	77.1
I'd rather not say	5	0.9
Total	590	100.0

Table 3 Responses by income

	Frequency	Percent
\$20,000 or less	12	2.0
\$20,001-\$30,000	36	6.0
\$30,001-\$50,000	40	6.8
\$50,001-\$70,000	53	9.0
\$70,001-\$100,000	78	13.2
\$100,001 or more	210	35.7
Other	13	2.2
I'd rather not say	143	24.3
Total	590	100.0

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

Table 4 Responses by home ownership

	Frequency	Percent
Owned	498	84.4
Rented	27	4.5
Private trust	26	4.5
Other	4	0.7
I'd rather not say	34	5.8
Total	590	100.0

Table 5 Responses by ethnicity (multi-choice)

	Frequency	Percent
New Zealand European	450	77.0
Māori	178	30.4
Pacific people	9	1.6
Asian	4	0.6
Middle Eastern, Latin American or African	6	1.0
New Zealander/Kiwi/Not stated	29	4.9
Other	28	4.8
Total	590	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 2025. The data is collected using a 1-10 scale; satisfaction percentages are aggregated 6-10 ratings.

Benchmarking results are reported at the 95% confidence level, +/- 5%.

\*Excludes Auckland, Wellington, Christchurch and Dunedin.

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 2024-25 include:

Q1 factors (July-September 2024):

1. In early July 2024, Councillors adopted 'Our Climate Pathway' — Whakatāne District’s Climate Change Strategy 2024-27 along with the accompanying Climate Change Action Plan. This strategy, developed through a community-led process, marks a significant move towards collective, community-wide action on climate change. The Council’s adoption of the strategy signifies a commitment to supporting and facilitating the actions rather than asserting ownership. 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.
2. In early August 2024, Whakatāne District Council adopted its Long Term Plan 2024-34 and associated supporting documents at an Extraordinary Council Meeting. The Plan has been described as one of the most challenging in decades as councils throughout New Zealand have grappled with how to manage the impact of deferred rates increases, followed quickly by record-high inflation and interest rates meaning the cost to continue delivering the same services is significantly higher. Council received almost 1,000 submissions from individuals and groups and heard from approximately 80 submitters during public hearings. There was a very clear message from many submitters that ‘times are tough’.
3. In mid-August 2024, Whakatāne District Council unanimously decided to retain Māori Wards for the 2025 triennial elections. The decision means voters in the 2025 Local Elections will be asked to vote on the Mayor,

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

Councillors and three Māori Ward Councillors, whilst at the same time voting on the retention or disestablishment of Māori Wards for the 2028-31 triennium through a binding poll. Council members included a resolution to seek legal advice on what the implications would be if Whakatāne District Council chose not to proceed with the binding poll.

4. From late August 2024, Whakatāne District Council implemented changes to its meeting processes to align with recommendations from the Chief Ombudsman's recent report on best practice for council workshops. The Council will adopt several new measures to ensure compliance with legislation and improve transparency, in response to the Chief Ombudsman's investigation into council meeting practices across eight councils, although Whakatāne District Council was not part of this initial investigation.
5. In September 2024, the government announced a significant initiative to improve the use of mobility parking spaces and update parking fines, impacting councils nationwide, including Whakatāne District Council. From 1 October 2024, parking fees in the district will increase as part of a government effort to align penalties and fees with inflation. This initiative aims to ensure the parking system remains efficient and fair, address accessibility issues and support local councils in managing parking more effectively.

Q2 factors (October-December 2024):

6. In early October 2024, Council adopted the Whakatāne District Tree Strategy – Ngā Taonga a Tāne; aiming to address the challenges associated with the Council's amenity trees which provide environmental, recreational, and aesthetic value to local streets and parks. The Strategy outlines a comprehensive framework for managing, protecting, and growing the district's tree population, recognising the vital role urban trees play in improving the wellbeing of communities.
7. In October 2024, applications opened for two key funding opportunities designed to support local community initiatives and water-related projects in the Whakatāne District. The first fund of multi-year grants is designed to

provide long-term support to non-profit organisations and charitable trusts offering essential services to the local community. The Te Puaha Fund also opened its second round of applications this year, aimed at supporting non-profit organisations, charitable trusts and individuals working on water-related initiatives.

8. In October 2024, Council invited residents to help shape a new service aimed at improving access to Council services for those living in outlying communities. The Honoa Hapori Community Connections Service will feature two specially equipped vans designed to act as mobile hubs of engagement. The project is being externally funded with \$500,000 from the Department of Internal Affairs Better Off Funding.
9. In October 2024, Council announced that its ability to deliver on local roading projects has been severely hampered following a decision by Central Government to significantly reduce external funding. This decision will impact the delivery of key improvements and planning activities outlined in the 2024-2027 Long Term Plan. Despite newly announced funding for two local resilience projects, there remains an overall shortfall of \$13.4 million for planned local roading projects.
10. In October 2024, the Wharfside upgrade project at Port Ōhope officially commenced. Construction was expected to be completed by December 2024, and will transform Wharfside into a more flexible and appealing venue for both locals and visitors.
11. In October 2024, the Council's proposed Our Places – Eastern Bay Spatial Plan to address growth and guide the future of the Eastern Bay of Plenty sub-region was presented for community feedback. The plan will set out where the Eastern Bay wants to head in the next 30-plus years and provide a roadmap, or spatial plan, for how to get there. Community consultation is open through to November 2024.
12. In late October, Council took a significant step toward addressing long-standing environmental and public health challenges in Matatā by securing a key piece of land for a centralised wastewater system. The purchase will provide the necessary land for both a treatment plant and the disposal of treated wastewater. This long-term infrastructure investment will help

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

ensure the environmental and public health needs of Matatā are met, while also supporting future growth in the area.

- 13. In November and December 2024, significant road maintenance and improvement works were undertaken on several main streets as part of Council’s ongoing road maintenance programme. The Strand, Kakahoroa Drive Service Lane and Commerce Street were scheduled for road re-sealing, including tree removals and minor parking amendments to CBD disability parking to better cater to community needs.
- 14. In November 2024, the Whakatāne District Tourism and Events team announced hopes that a significant amount of work to encourage visitors for the summer and autumn seasons would result in a much-needed boost for local businesses, following a challenging year. Annually visitors to the Whakatāne District spend around \$68 million in the retail sector (excluding fuel and automotive) and approximately \$29 million in hospitality services. Over 1200 people in the district are employed in the tourism sector. Tourism data shows it’s been a challenging winter to attract the visitor dollar, corresponding with a tight economy across the country.

Q3 factors (December 2024-February 2025):

- 15. In December 2024, public hearings held for feedback on Plan Change 8 (Huna Road), with implications for the future of the district’s housing stock. Significant progress has been made to date on the proposal, which seeks to amend the Whakatāne District Plan to address the district’s housing demand by rezoning land from Deferred Residential to Residential to allow for housing to be developed, encouraging the development of a diverse range of housing. Additionally, the proposal includes a coordinated approach to the development of infrastructure, ensuring that necessary facilities and services accompany the growth in residential areas.
- 16. In December 2024, Whakatāne District Council considered options to protect and provide the community’s water services under the Government’s new ‘Local Water Done Well’ (LWDW) legislative requirements, to ensure sustainable and efficient water services for the community. As part of this programme, all councils must develop and

submit Water Services Delivery Plan (WSDPs) by early September 2025. This process allows councils to design the structure, delivery method, and funding arrangements for their water services. Following consultation, elected members will make their final decision on the delivery model, with the Plan submitted to the Department of Internal Affairs by 3 September 2025

- 17. In December 2024, Council identified potential budget savings for 2025’s Annual Plan, thanks to cost-saving measures and a slight easing of interest rates and inflation pressures. The Annual Plan draft budget report presented five options for allocating the savings identified; councillors indicated to staff to prepare a draft Annual Plan budget based a ‘mixed model’ approach; reducing rates increases up to 1%. Councillors opted not to undertake full consultation for this year’s Annual Plan, as this is not a legislative requirement for Year 2 of a Long Term Plan, and because variations were not significant in terms of service change. Instead, information will be shared with communities to explain how the rates were set and implications for households.
- 18. In February 2025, Council sought community input on Plan Change 4 (PC4): Building Platform Level. The proposed change to the Whakatāne District Plan aims to better manage flood risk to buildings and simplify the consenting process.

Q4 factors (March – June 2025):

- 19. In March 2025, Council’s draft 2025/26 Annual Plan budget was presented to the Mayor and Councillors, outlining a budget that keeps costs down while still investing in the district’s future. The budget achieved a 2.2% reduction in the proposed operating expenditure for Year Two of the Long Term Plan (2025/26) while still delivering essential services and investing in the future; with an average rate increase of 11.7%, down from the forecast 12.7% for Year Two, with savings helping to reduce Council’s deficit faster.
- 20. In March 2025, Council signalled its willingness to collaborate with other councils through a Council Controlled Organisation (CCO) for the future delivery of water, wastewater and stormwater services. Under the

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

Government’s Local Water Done Well legislation, all councils must submit a Water Services Delivery Plan by 3 September 2025, either individually or jointly. The Council planned to make a final decision on its preferred option in April 2025, with community consultation scheduled before a final plan is confirmed.

- 21. In April 2025, Council launched a trial of an electronic parking management system to improve parking warden safety. The technology aims to protect parking staff from confrontational situations while also improving parking efficiency for residents and visitors.
- 22. In May 2025, Council approved a key plan change to unlock new housing in Whakatāne has been, paving the way for around 175 new homes, including papakāinga and medium-density options. Council confirmed that Plan Change 8, which rezones around 15 hectares of land near Huna Road, will be fully operative by the end of the month.
- 23. In May 2025, Council adopted a revised Procurement Policy to bring its approach in line with modern best practices, support local outcomes, and strengthen financial and risk management. The revised policy sets out a clear and consistent framework that prioritises value for money, fairness, and strong local and environmental outcomes, and aligns with the New Zealand Government Procurement’s five principles – including managing for great results, being fair to suppliers, and securing the best deal for everyone involved.
- 24. In May 2025, Council approved Plan Change 5: Accessible Parking, following extensive community consultation. This decision ensures accessible parking is required for key facilities such as medical centres, libraries, and shopping centres, despite the removal of general minimum parking requirements from the District Plan.

- 25. In May 2025, Council invited the community to share its views on proposed speed limit changes across several local roads, as part of a district-wide consultation process. The proposed changes aim to make roads safer and more suitable for how they’re used today – particularly around schools, marae, residential areas, and popular recreational spots. Many of the proposed changes have been shaped by community input, safety assessments and requests from residents, schools, and local organisations.
- 26. In June 2025, Council announced solar installations were set to begin at three key Council facilities. Between June and September, grid-tied solar systems were to be installed at the Dog Pound, Whakatāne Resource Recovery Centre, and the Main Council Building on Commerce Street. These will be the first Council-owned buildings to transition to solar energy, marking a significant milestone in Council’s sustainability journey.
- 27. In June 2025, Council formally adopted its Annual Plan for the 2025/26 financial year, confirming an average rates increase of 11.7% (aligning with the average across councils nationwide). The increase represents a reduction from the previously forecast 12.7% for Year 2 of the Long Term Plan 2024-34 – and regarded as a necessary response to a difficult economic environment. Compared to the forecast for 2025/26, operating expenditure has been reduced by 2.2%. The number of planned new full-time equivalent roles over the 10-year period has also been reduced from 32 to 26, with no new staff being added in Year 2.

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)



TOP PERFORMING

- Whakatāne Exhibition Centre - 86%
- Kerbside waste collection service - 83%
- Whakatāne Crematorium - 83%
- Sports fields - 82%
- Whakatāne Museum and Research Centre- 82%



LOWEST PERFORMING

- 24% - Noise control
- 29% - Dog control
- 33% - Business promotion
- 45% - Event promotion
- 47% - Tourism promotion



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

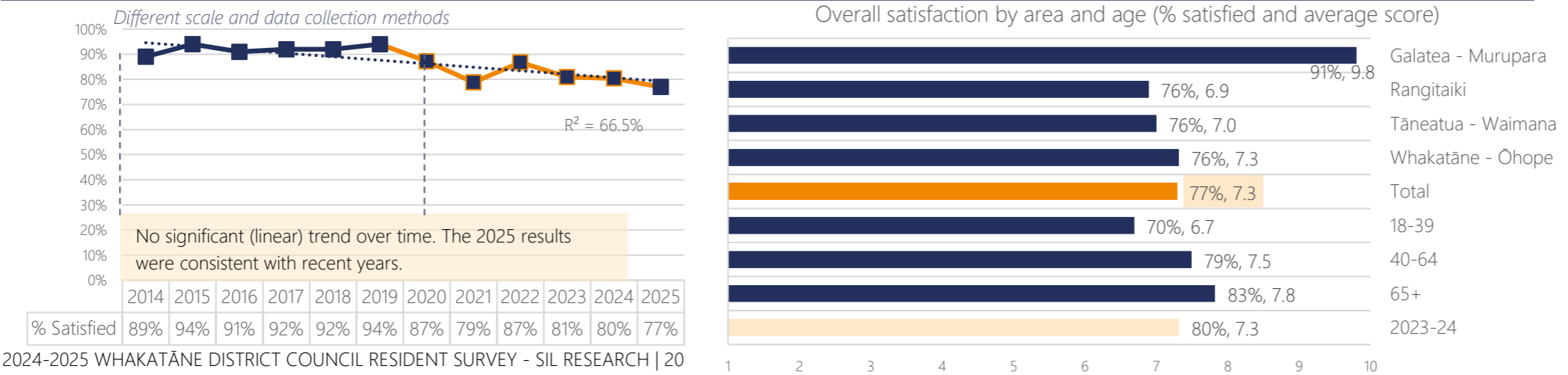
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Parks and reserves



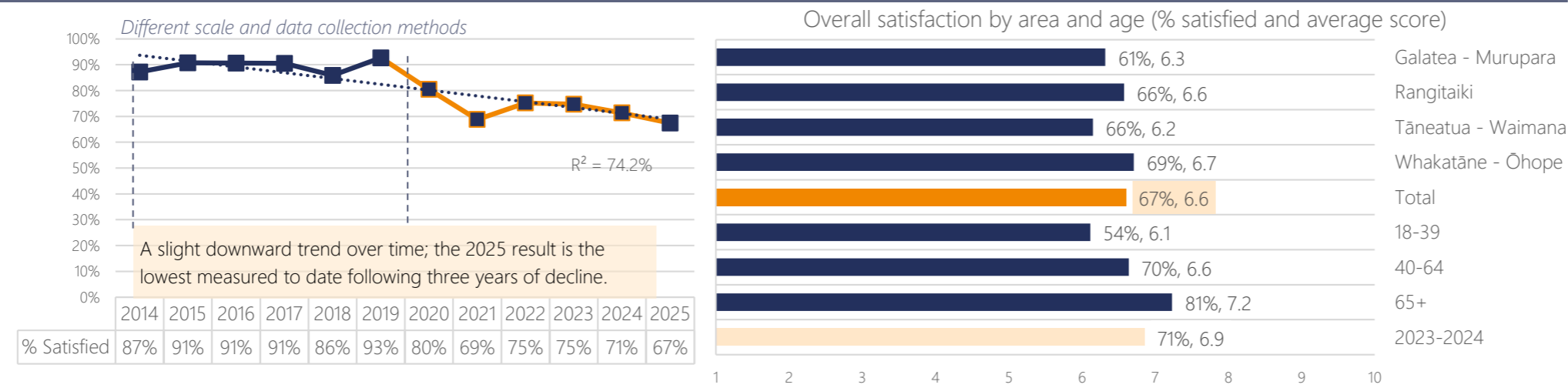
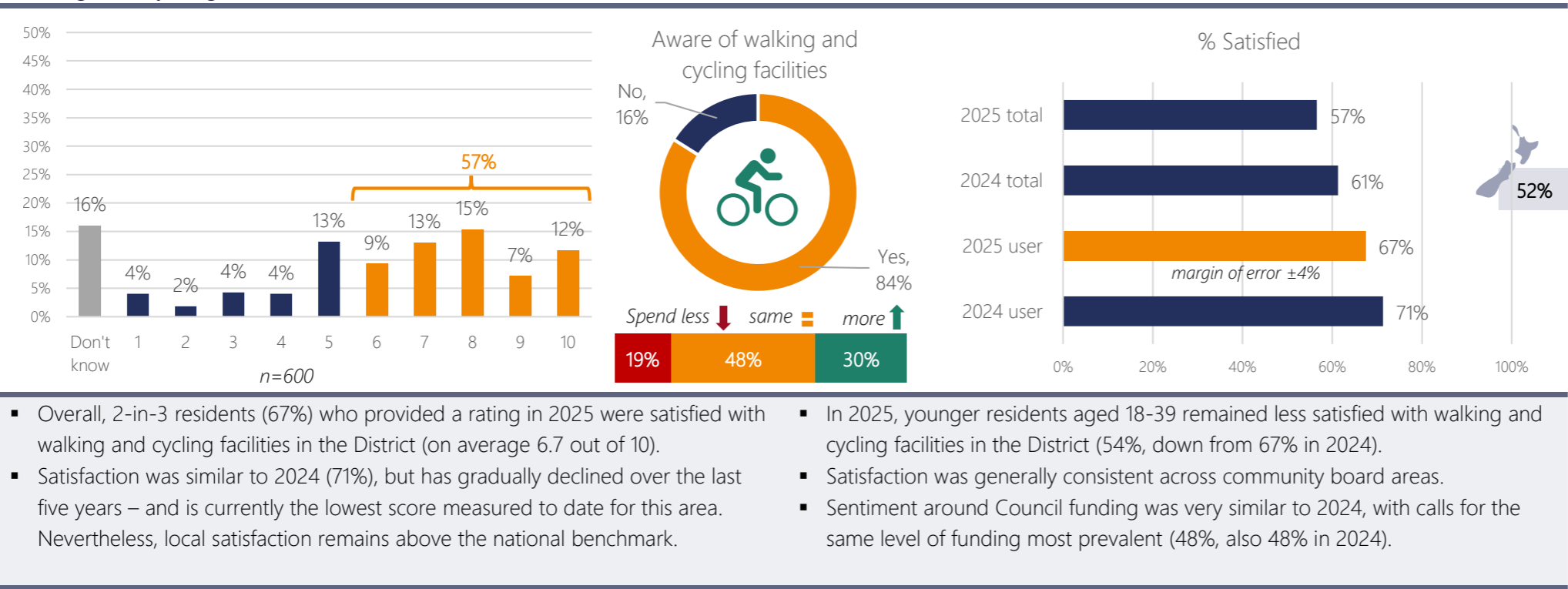
- In 2025, 60% of residents stated they had visited parks or reserves in the District (down from 71% in 2024 and 2023).
- 77% of these residents were satisfied with their parks or reserves, which was similar to 2024 (80%) and 2023 (81%), but still below the 2022 level (87%) – despite remaining on par with the national benchmark.
- The average satisfaction rating score (7.3 vs. 7.3 in 2024) remained consistent over the last few years.
- There were significant differences by age and area in 2024. Satisfaction continue to rise with age, older residents (aged 65+) remaining most satisfied – with all age groups achieving high satisfaction (70% or above).
- On average, satisfaction was highest in the Galatea-Murupara community board area (albeit limited by a smaller sub-sample). Other areas scored consistently.
- Overall, residents typically preferred seeing similar levels of Council funding spent on parks or reserves (67%, similar to 71% in 2024).



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Walking and cycling facilities in the District

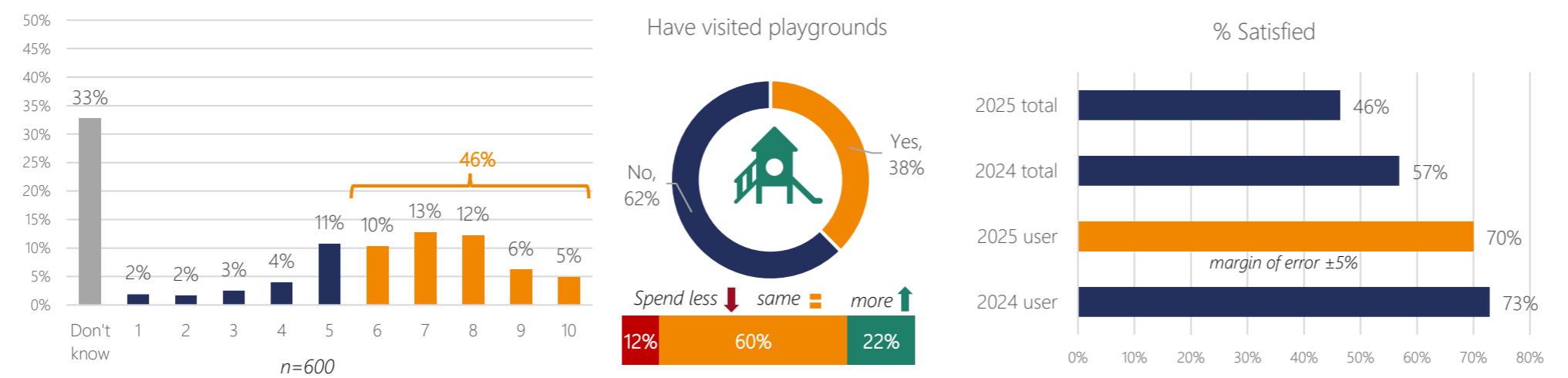


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

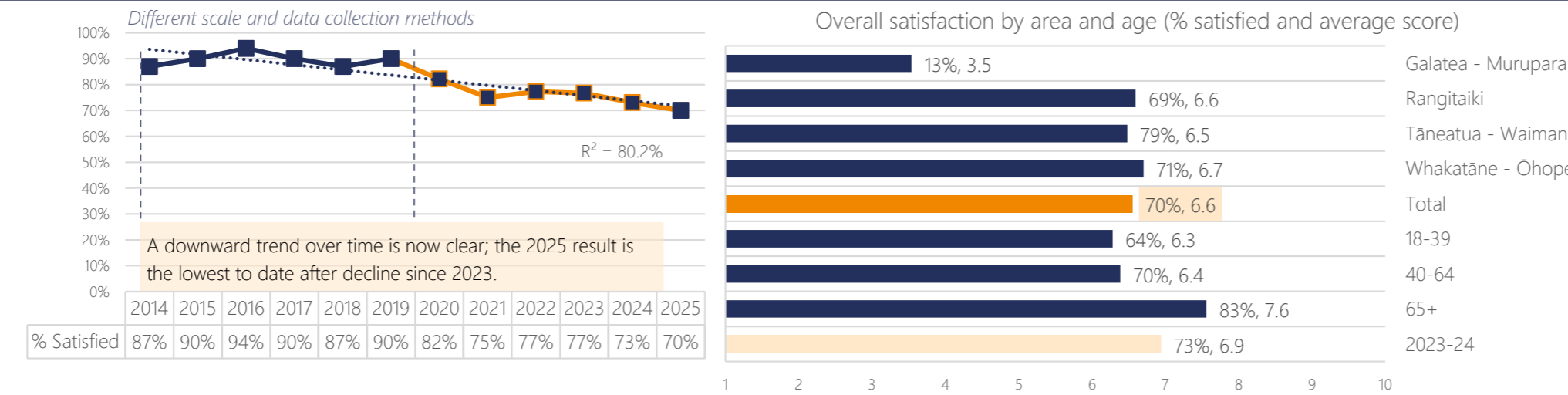
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Playgrounds



- In 2024, 38% of residents reported visiting a playground - down from 48% in 2024, but similar to 2022 (42%).
- Among playground visitors, satisfaction in 2025 (70%) was slightly lower than 2024 (73%) but has declined gradually in recent years to a new historical low level.
- Satisfaction with playgrounds remained lower among younger respondents, though similar to 2024. Results were generally similar across location (with low subsample in Galatea-Murupara contributing to the lower score there).
- The majority (60%) of residents preferred seeing the same level of Council funds spent on playgrounds (similar to 65% in 2024).

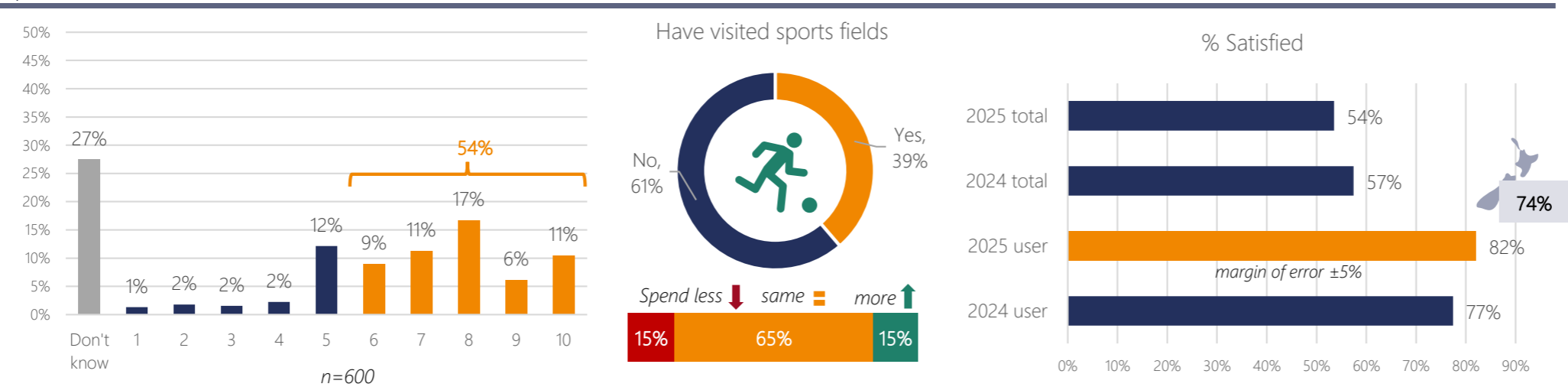


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

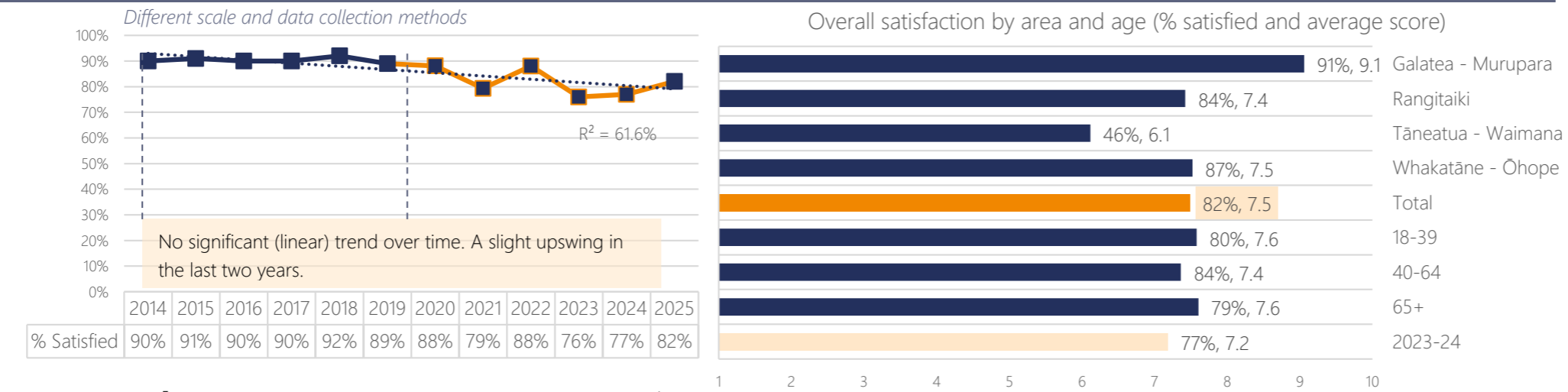
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Sports fields



- In 2025, 2-in-5 residents (39%) reported visiting sports fields (consistent with 42% in 2024 and 2023, and 39% in 2022).
- Satisfaction with sports facilities has seen an upswing in the last two years, currently at 82% among users (reversing the low of 76% in 2023) – one of the more positive improvements in 2025, and above the national benchmark. 1-in-10 residents provided the highest satisfaction rating for this service area.
- Satisfaction remained similarly high across age groups, and particularly for 18-39 year olds (80% in both 2025 and 2024).
- Scores were also similar high (above 80%) across locations, except for Tāneatua-Waimana (small subsample of users).
- The majority (65%) of residents preferred seeing the same funding levels for sports fields (similar to 64% in 2024) – moreso than most other areas in 2025.

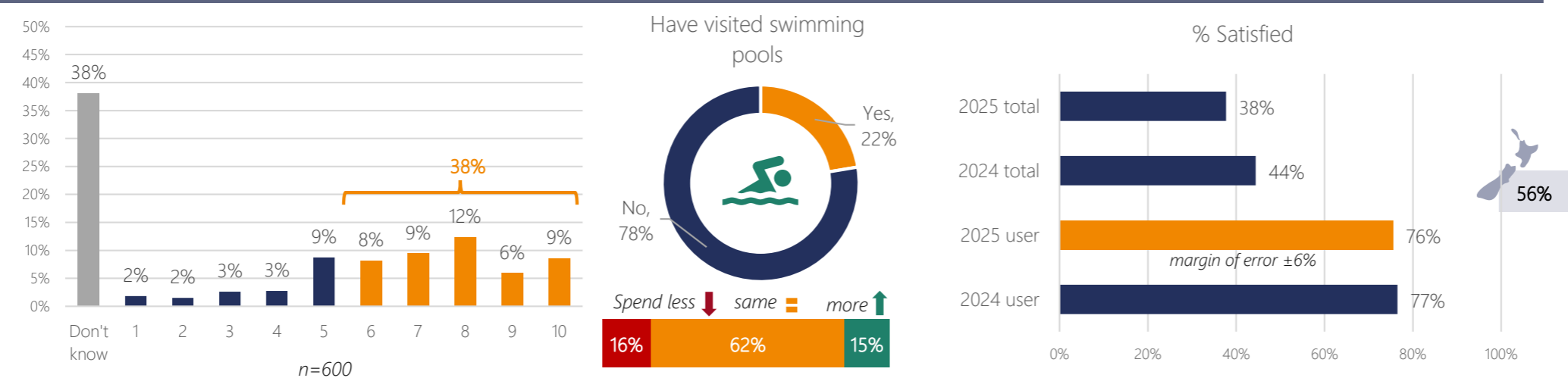


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

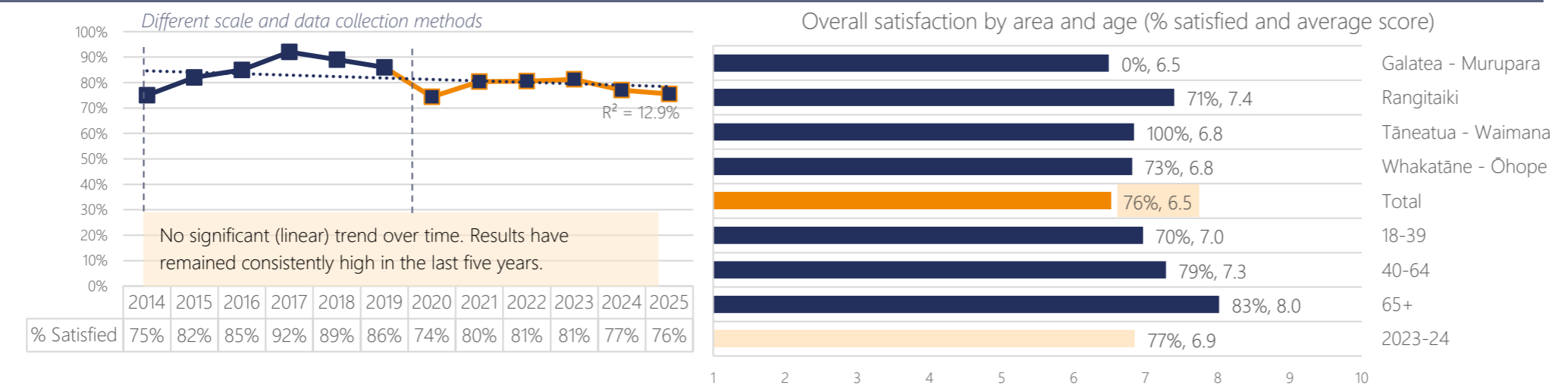
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Public swimming pools

LTP MEASURE



- 1-in-5 residents (22%) reported visiting a District swimming pool in 2025 (down from 32% in 2024, but similar to 26% in 2023 and 25% in 2022).
- Satisfaction among pool users in 2025 (76%) remained high and consistent with recent years – and now 20%-points above the national benchmark.
- In 2025, satisfaction was similar across age groups, but slightly lower for 18-39 year old users (although still high at 70%).
- Overall, 3-in-5 residents (62%) preferred the same level of Council funds applied to public swimming pools (64% in 2024).

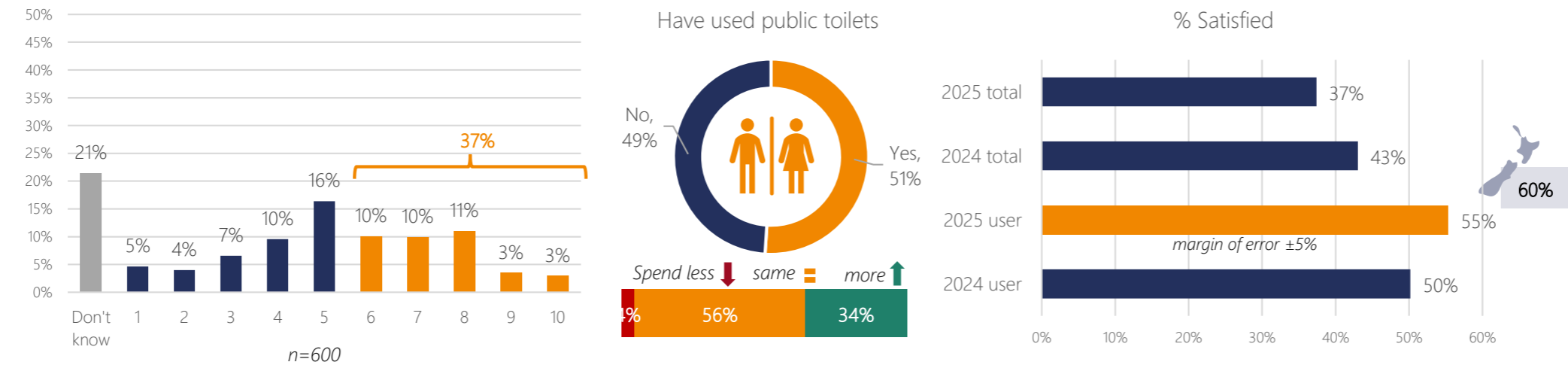


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

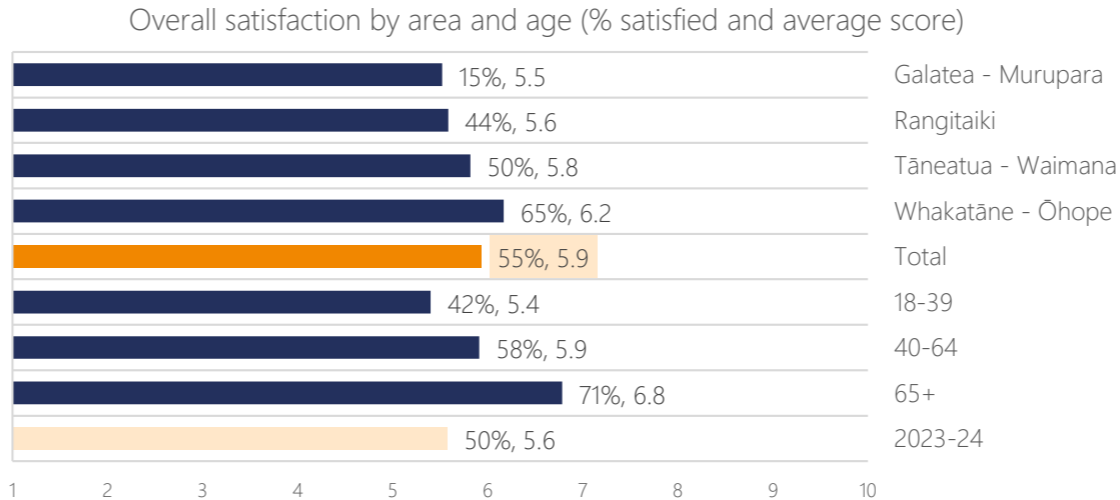
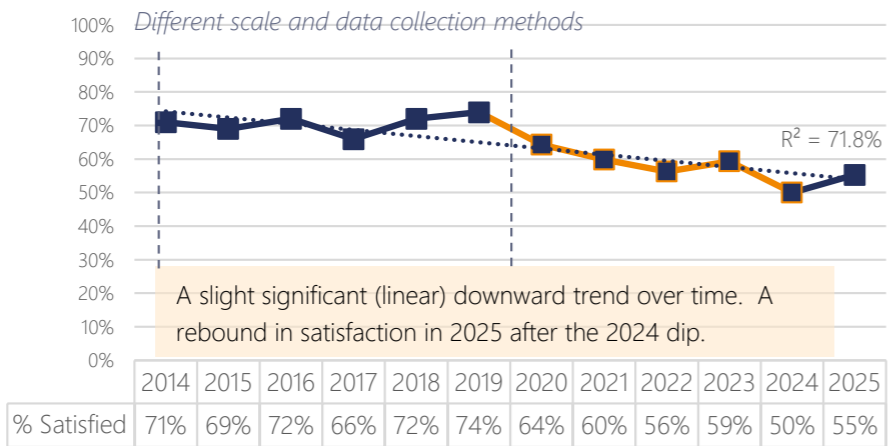
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Public toilets

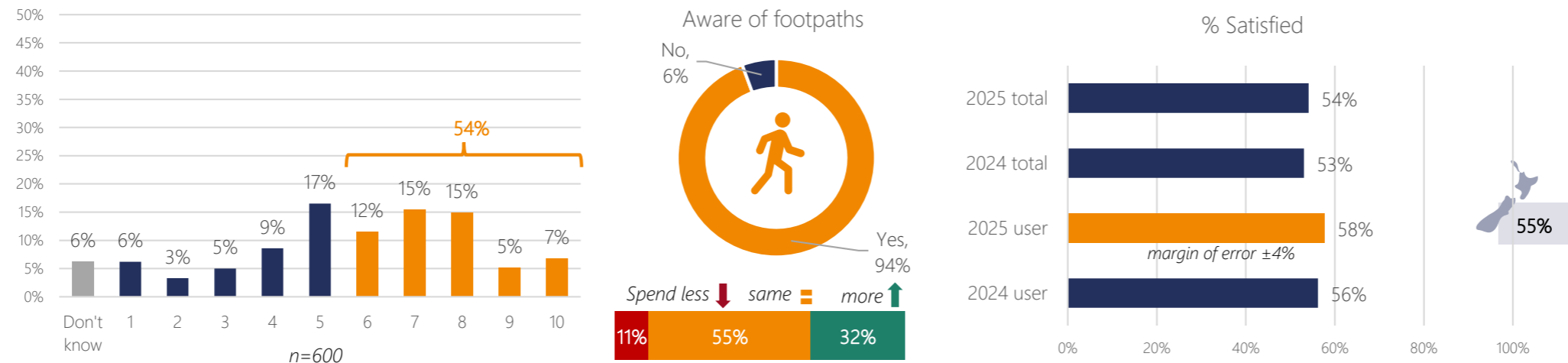


- In 2025, half of residents (51%) reported using a public toilet in the District (similar to 61% in 2024).
- Among public toilet users, satisfaction recovered slightly in 2025 (55%) from the historical low in 2024 (50%) after several years of stability (down from 59% in 2024) – just below the national benchmark average (60%).
- Satisfaction with public toilets remained lower among younger respondents (also typically higher users); and in areas outside Whakatāne-Ōhope.
- While the majority (56%) preferred the same funding levels for public toilets, these also remained a very high priority for more Council spending in 2025 (34% - the fifth-highest spending priority this year).

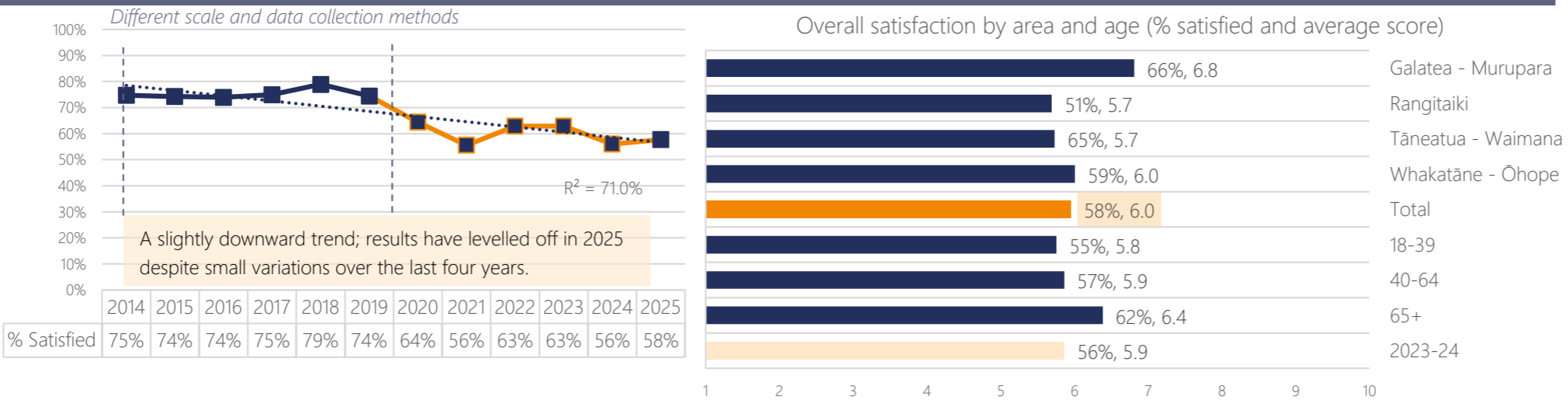


SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Footpaths



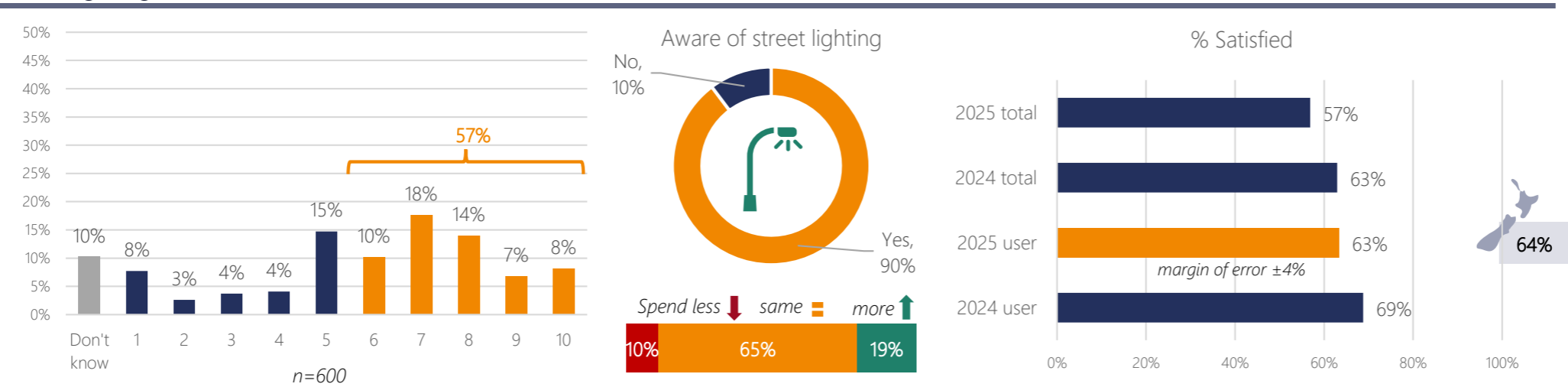
- Most residents (58%) who provided a rating were satisfied with footpaths in the District in 2025 (average rating 5.9 out of 10).
- Despite some small variations, satisfaction with footpaths has remained around the same level in the last four years – and just above the national benchmark.
- Satisfaction was also similarly high across community subgroups.
- Over half (55%) of residents preferred seeing Council funding of footpaths to remain the same (52% in 2024), although this also remained a higher priority for more funding (32%, 35% in 2024).



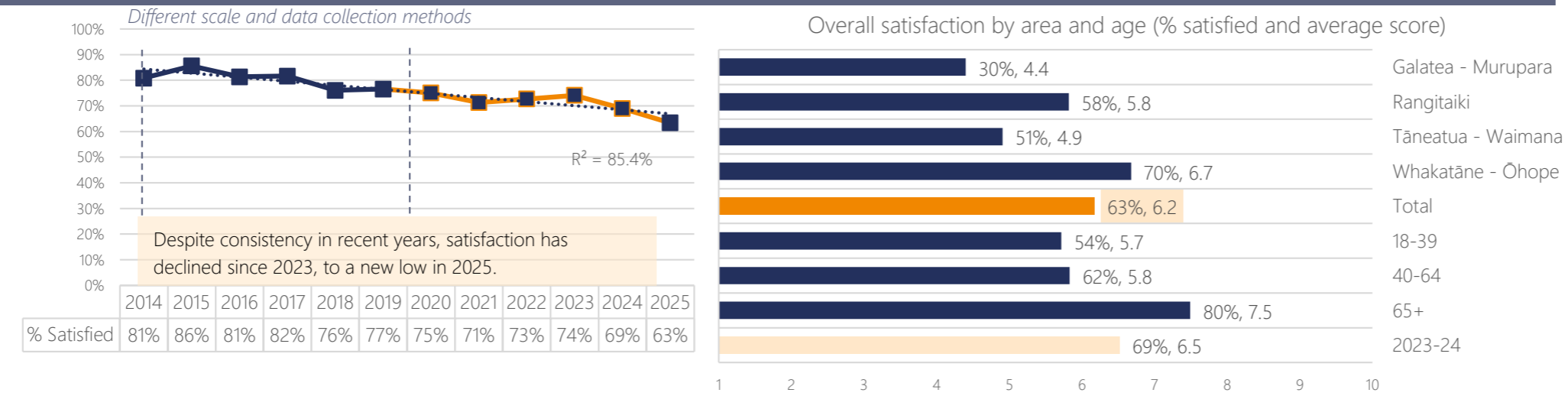
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Street lighting



- Satisfaction with street lighting has seen gradual decline over the last two years, currently at an historical low (63%) - down slightly from 69% in 2024, but significantly below 74% in 2023. Nevertheless, it is level with the national benchmark (64%).
- Satisfaction remained notably lower in areas outside Whakatāne - Ōhope.
- There was also a stark difference across generations, with older adults (65+) significantly more satisfied (80%, 85% in 2024).
- Overall, 2-in-3 residents (65%) preferred the same funding levels assigned to street lighting – one of the highest proportions requesting the same funding for any service in 2025.

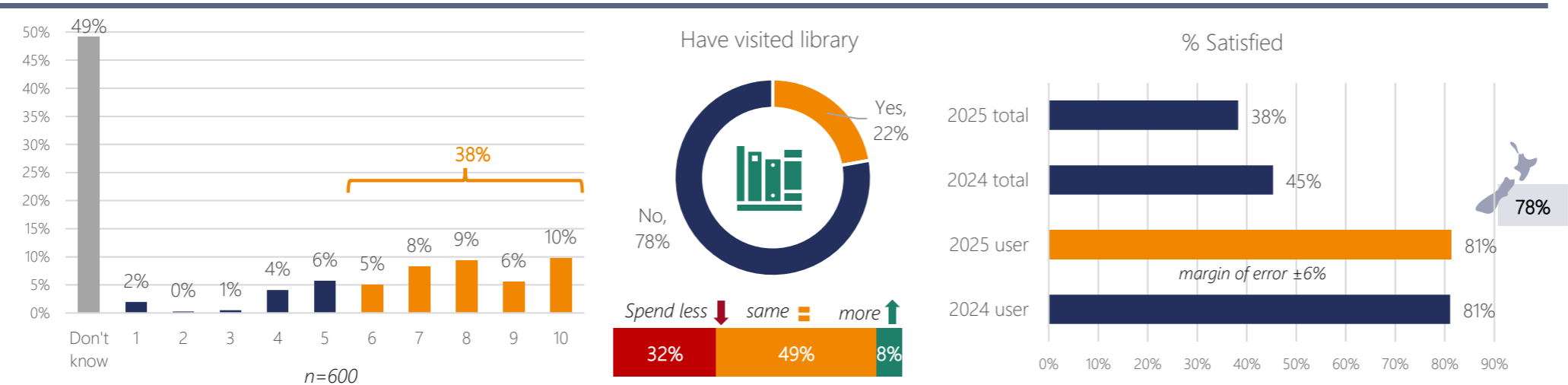


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

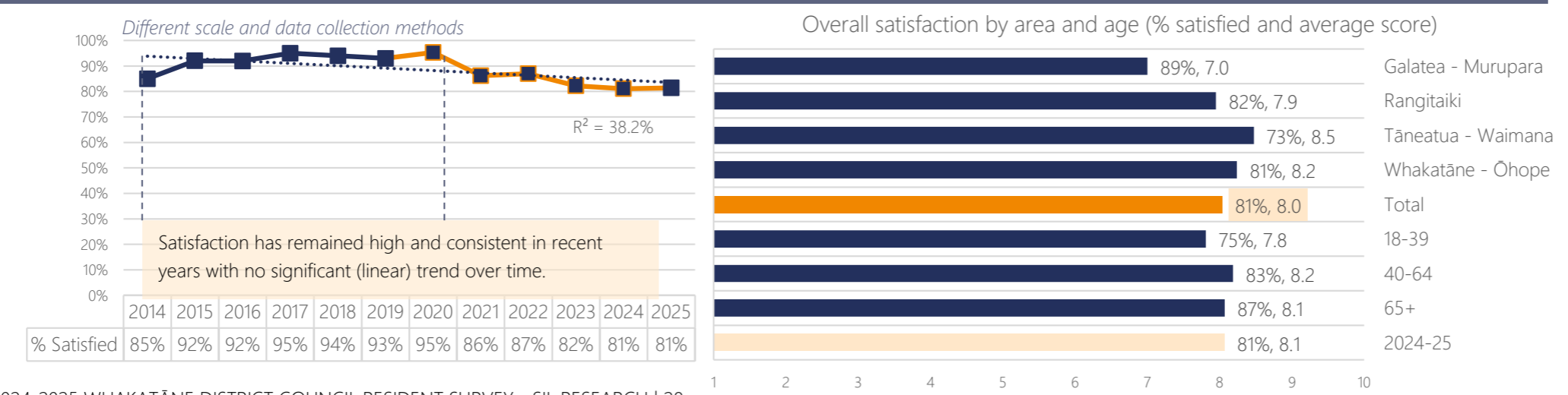
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Libraries in the District



- In 2025, 1-in-5 respondents (22%) reported visiting District libraries (down from 29% in 2024, but similar to 25% in 2023).
- Among users, satisfaction has remained at a consistently high level in recent years – currently the sixth-highest rated in 2025 (81%), and just above the national benchmark.
- Consequently, satisfaction was similarly high across community board areas.
- Satisfaction was also similarly high across age groups (75% or higher)..
- While half of residents (49%) preferred seeing the same level of Council funds spent on public libraries, this service remained the 2<sup>nd</sup>-highest area targeted for less spending – with this rising to 32% of residents (from 25% in 2024).



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

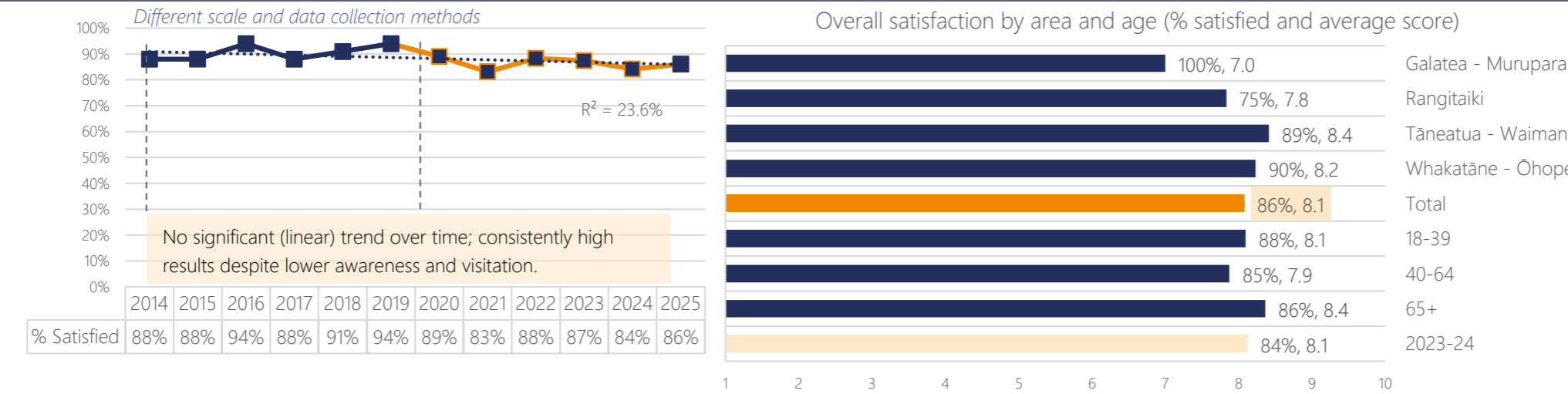
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Te Kōputu a te Whanga a Toi - Whakatāne Library and Exhibition Centre

LTP MEASURE  
(aggregated)



- 1-in-4 residents (26%) in 2025 reported visiting the Whakatāne Exhibition Centre (down from 31% in 2024).
- In line with low visitation levels, knowledge about the Centre also remained low with 2-in-5 residents not able to provide a rating (i.e. 'Don't know' responses).
- However, satisfaction remained high among Exhibition Centre visitors in 2025 (86%) – this was the highest-rated service/facility in 2025.
- Satisfaction was also typically high across community board areas, and age groups, despite low sub-samples of users across these segments.

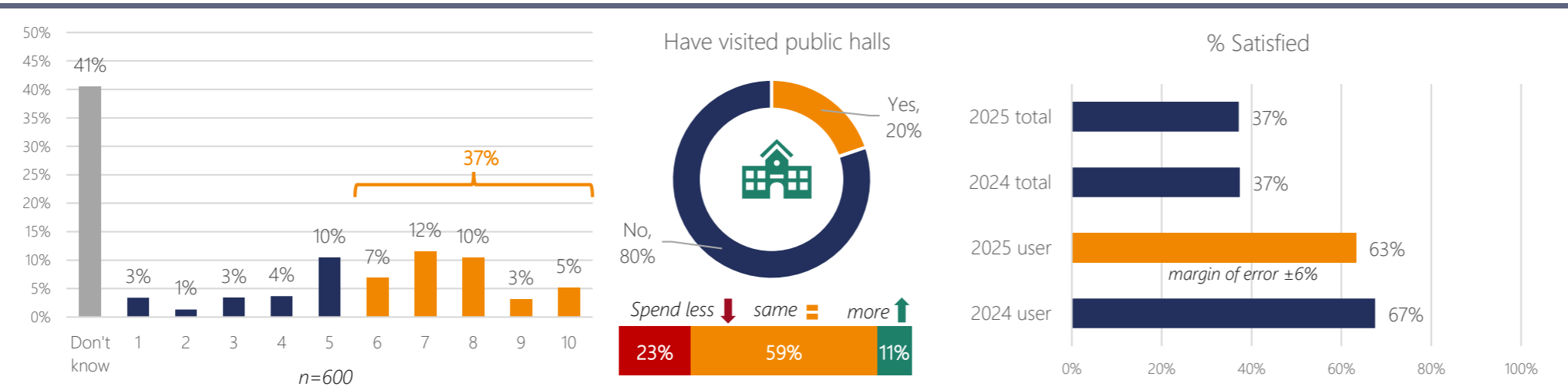


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

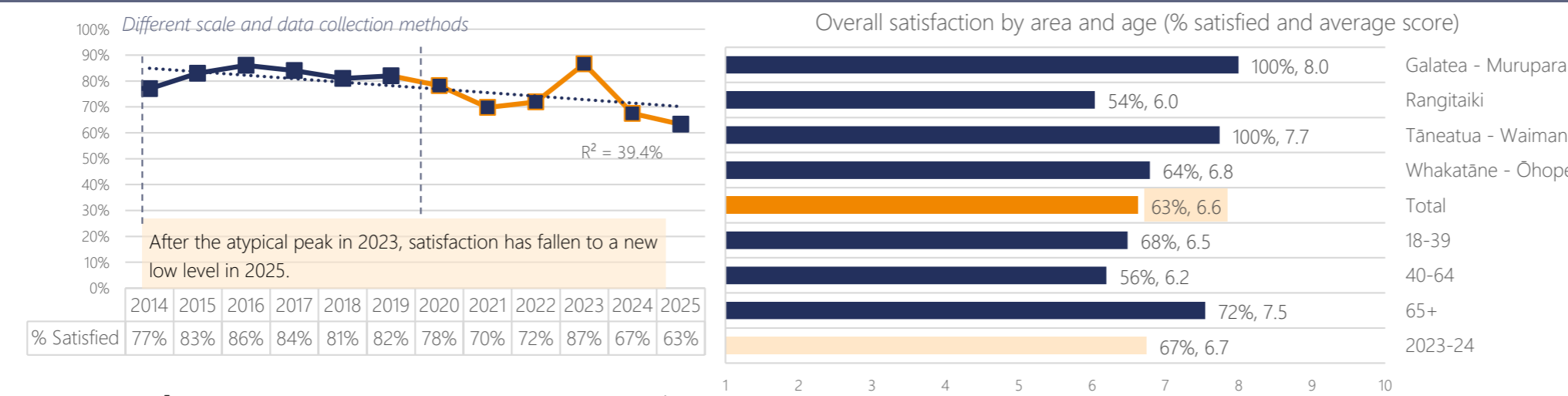
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Public halls



- As with the Whakatāne Exhibition Centre, many residents could not rate public halls in the district. Visitation of halls remained low in 2025 (20%), down from 2024 (27%) but similar to 2023 (also 20%).
- Despite low usage, satisfaction among public hall users (63%) fell to an historic low; down from 2024 (67%) and previous years (even accounting for the atypical peak of 2023).
- Community subsamples of users were low, nevertheless there was a rise in satisfaction for 18-39s (68%, 53% in 2024) despite greater satisfaction among 65+ year olds.
- Public halls remained a low spending priority - 59% of residents preferring the same level of Council funds spent on these facilities, with 1-in-4 (23%) wanting less spent.

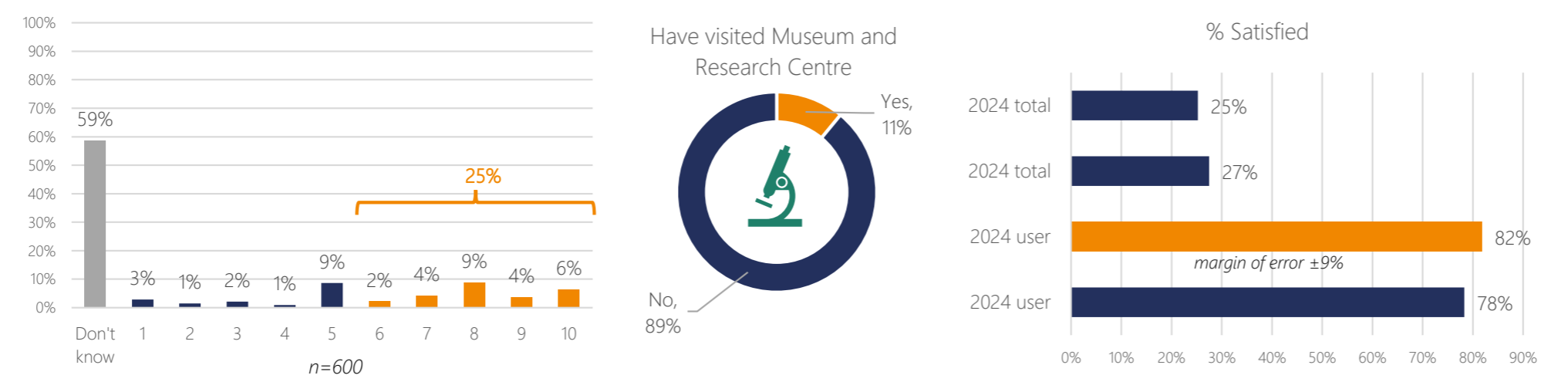


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

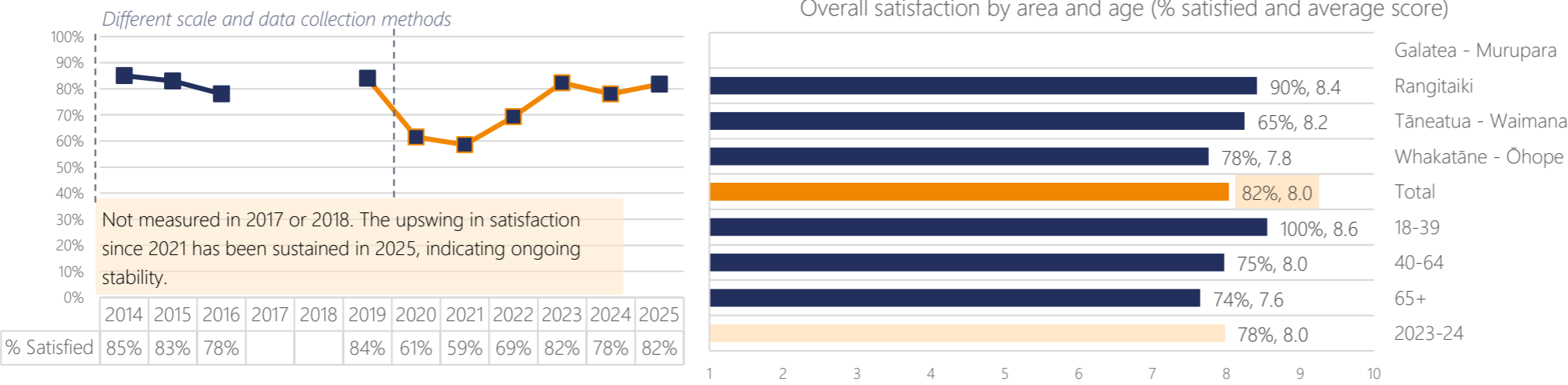
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Te Whare Taonga o Taketake - Whakatāne Museum and Research Centre

LTP MEASURE  
(aggregated)



- In 2025, just 1-in-10 residents (11%) reported visiting the Whakatāne Museum and Research Centre (similar to recent years) – with low levels of knowledge as a result once again (59% providing 'Don't know' ratings).
- However, visitors themselves were very highly satisfied at 82% in 2025 – the fifth-highest satisfaction level in 2025 – consistent with the previous two years.
- Reflecting these high overall results (and also low subsamples of users across community segments), satisfaction levels were consistently high across segments in 2025. Any observed differences particularly between community board areas were subject to small subsample sizes.

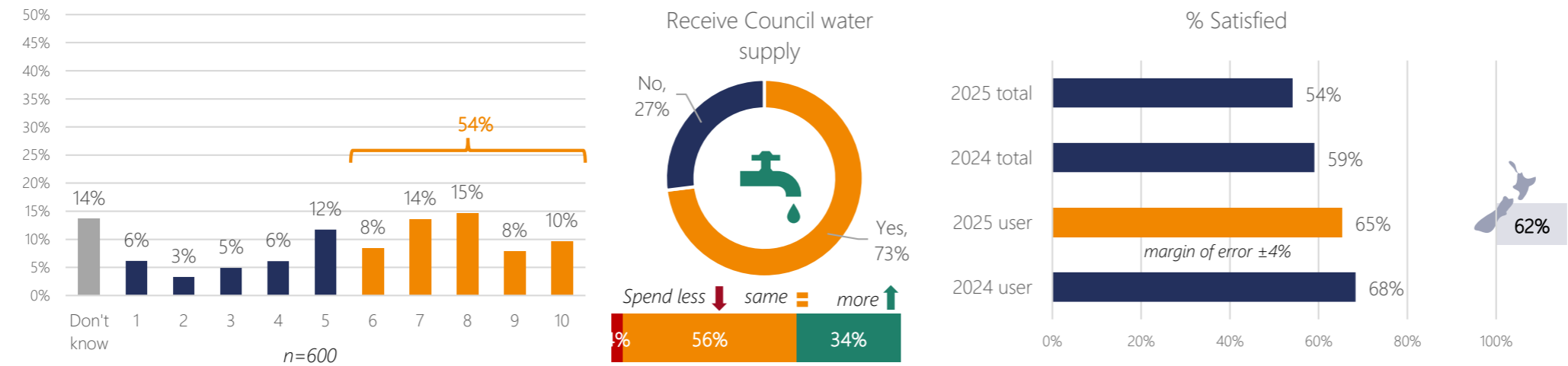


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

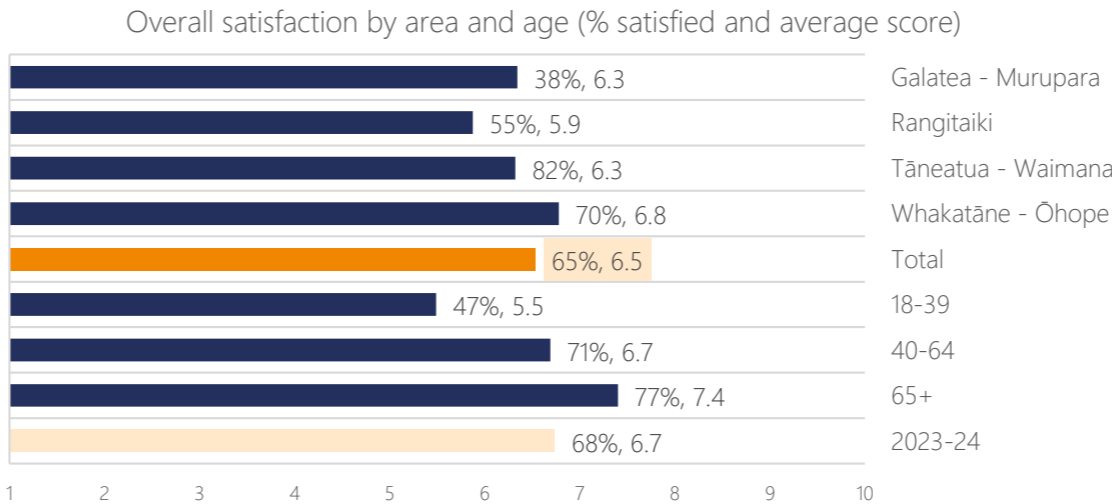
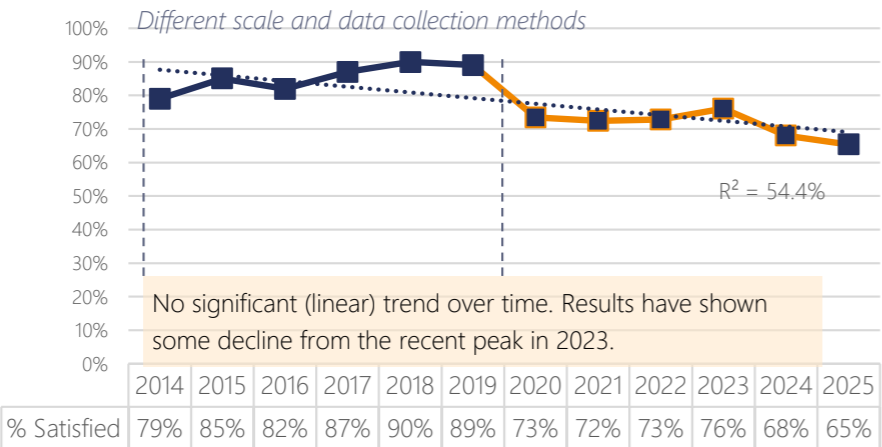
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Water supply



- In 2025, 3-in-4 residents (73%) reported being connected to Council's water supply (generally similar to previous years).
- Of residents on Council's water provision, 2-in-3 (65%) were satisfied with the supply overall (6.5 average rating). While similar to 2024, this has trended down since the recent peak of 2023 (76%) and higher levels of previous years.
- Overall satisfaction was driven mainly by Whakatāne-Ōhope residents (70%), with lower satisfaction levels measured in Rangitaiki (55%). Satisfaction was also notably lower among younger adults (18-39 (47%).
- Reflecting the importance of this service, water supply remained a high priority (4th-most) for more Council funding (34%, similar to 38% in 2024).

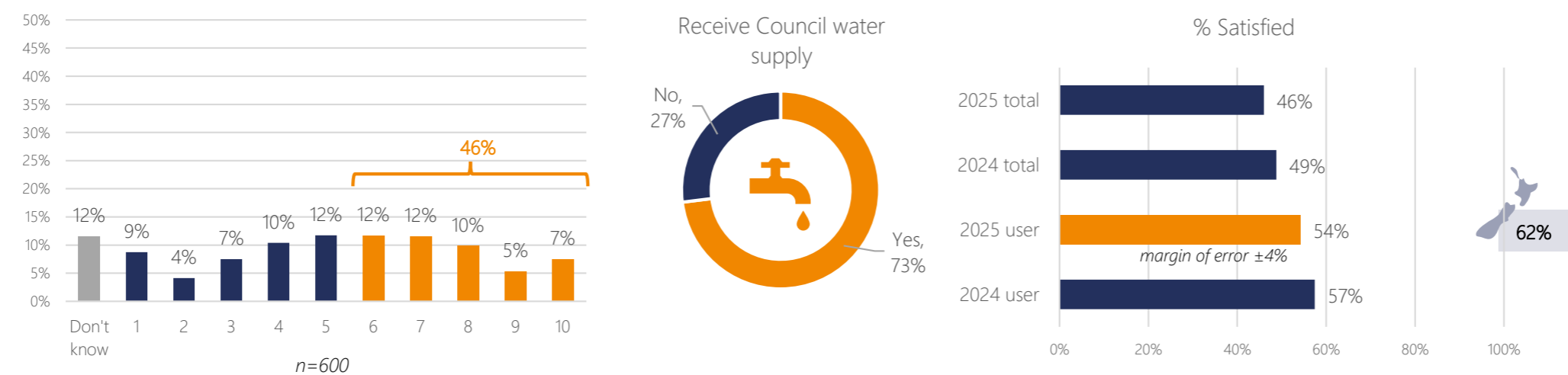


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

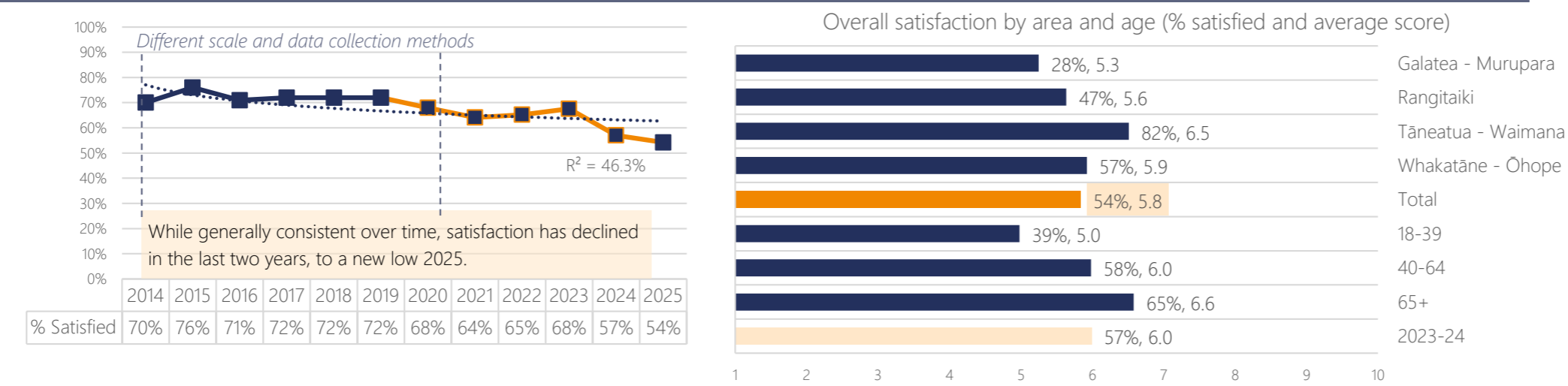
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Quality of drinking water



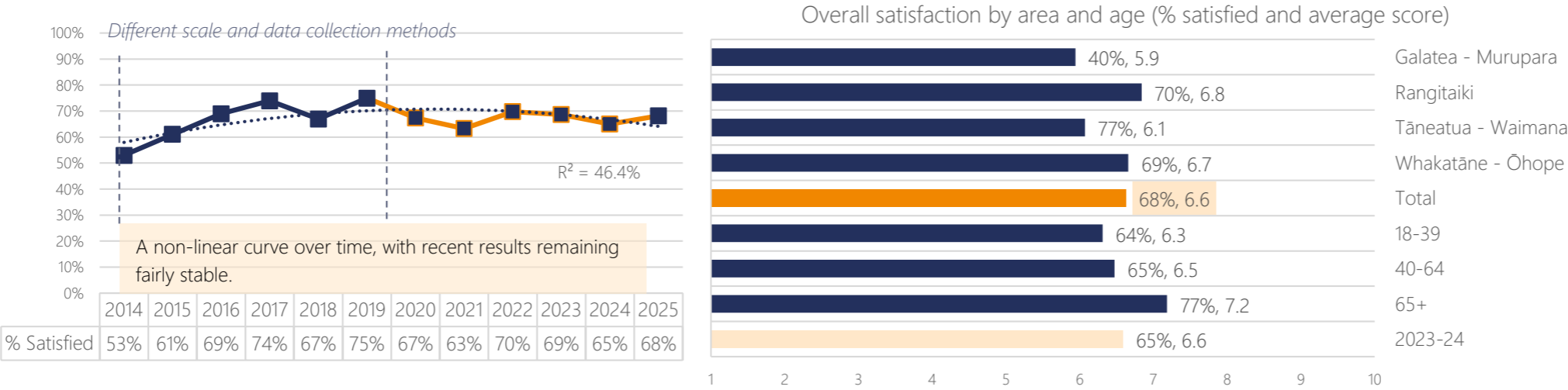
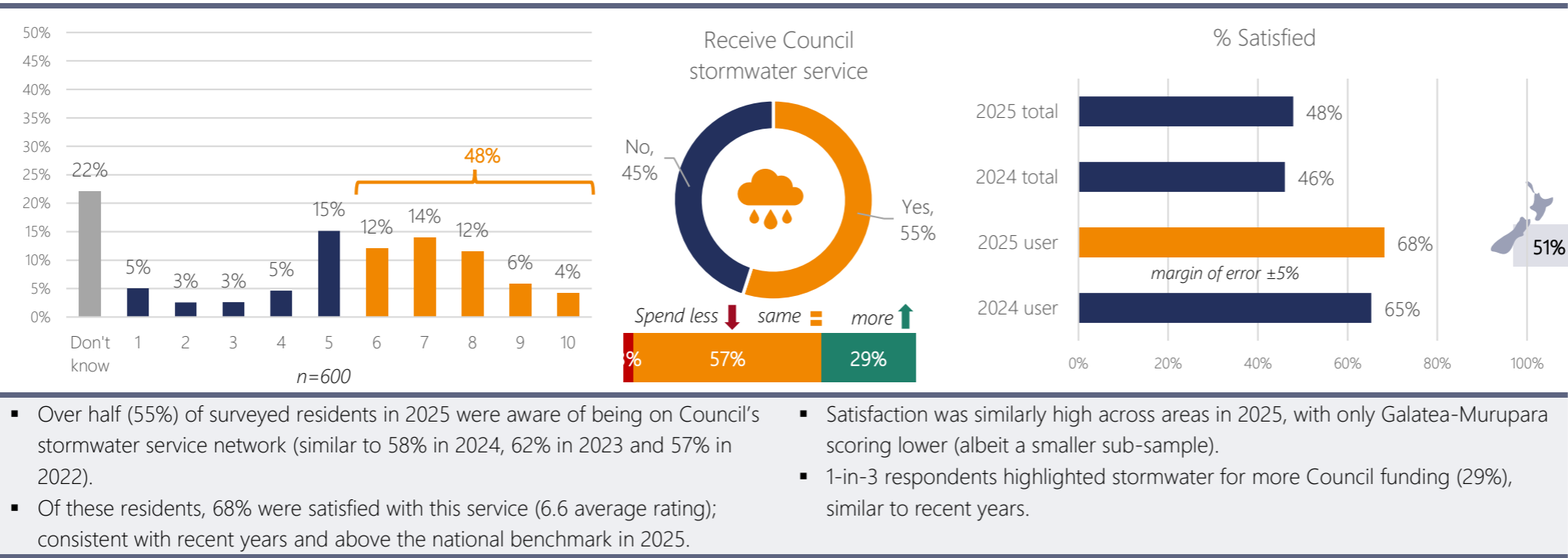
- Over half (54%) of residents on Council’s water supply in 2025 were satisfied with quality of their drinking water (5.8 average rating). However, this represented a notable decrease in satisfaction since 2023 (68%) and previous years – and a new historical low (after the previous low score of 2024). This was also below the national benchmark average.
- Quality concerns were highest in Galatea-Murupara and Rangataiki, with satisfaction below 50% in these areas.
- Satisfaction with water quality was also lower among younger adults, as it was for the water supply generally.



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

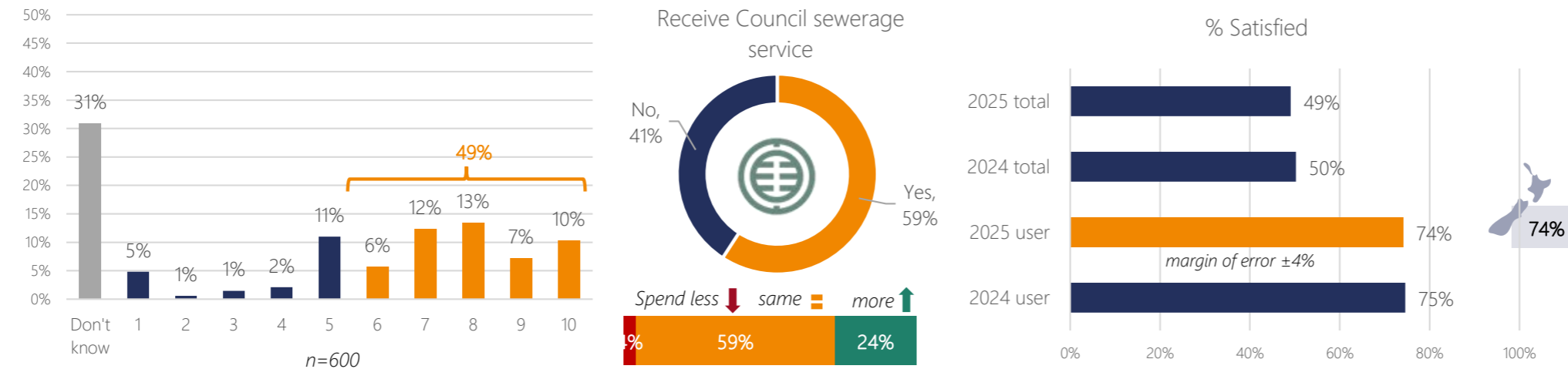
Stormwater service



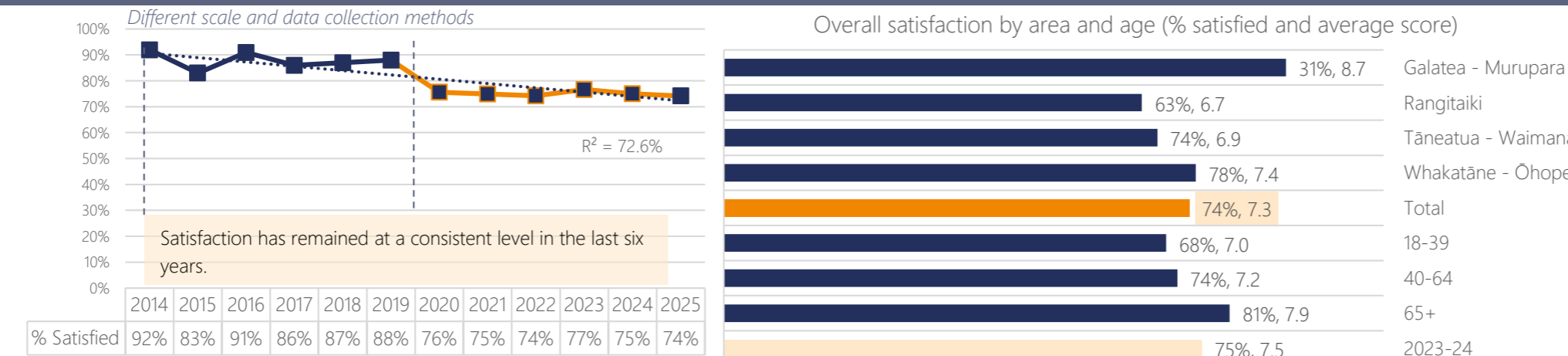
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Sewerage system LTP MEASURE



- Similar to stormwater, 3-in-5 (59%) surveyed residents reported being connected to Council sewerage services in 2025.
- 3-in-4 (74%) of these residents expressed satisfaction with the sewerage system (average rating 7.3); a result tha has stayed stable in recent years.
- Satisfaction was slightly lower outside the main centres of Whakatāne-Ōhope.
- Residents aged under 65 remained less satisfied with Council’s sewerage service on average compared to older respondents.
- Overall, 3-in-5 residents (59%) preferred the same funding levels spent on the sewerage system; 1-in-4 wanted more spending in this area (consistent with recent years).

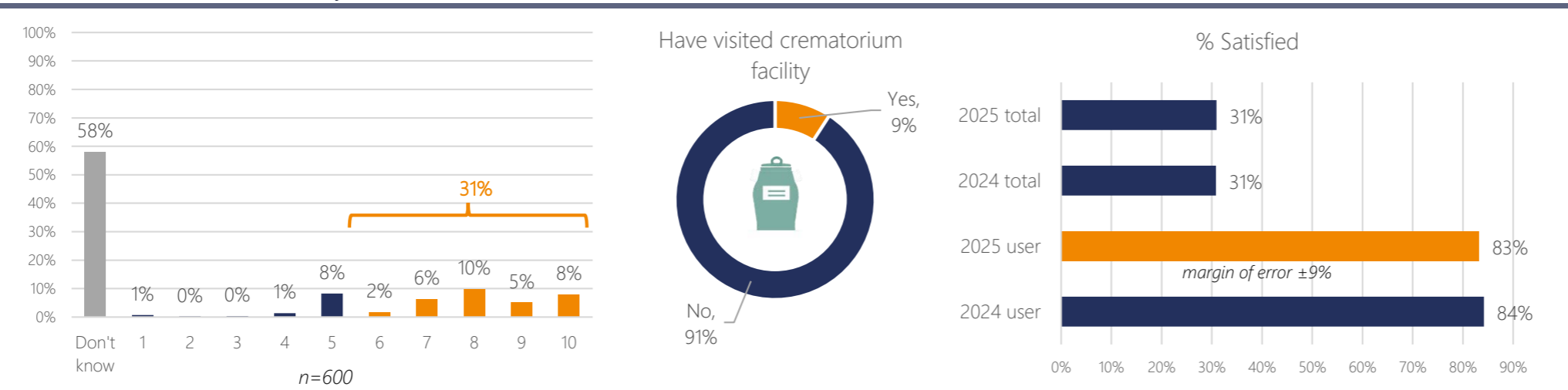


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

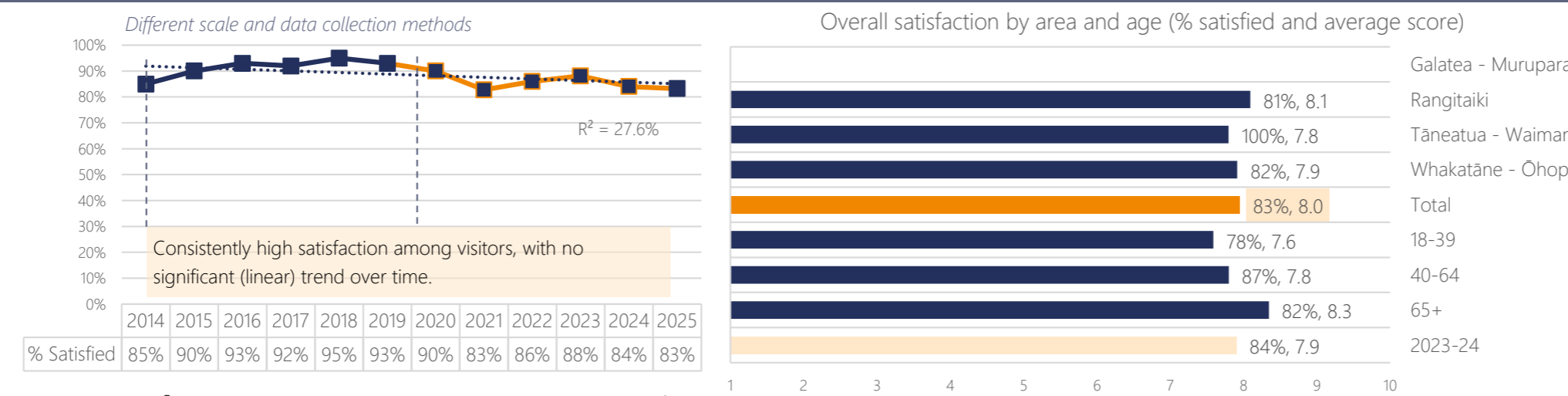
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Whakatāne crematorium facility



- Visitation of the Whakatāne crematorium has remained low historically; in 2025, just 1-in-10 (9%) residents reported visiting this facility (similar to recent years). As a result, knowledge of the facility remains low, with over half (58%) of residents unfamiliar with this in 2024 (62% in 2024).
- However, satisfaction among visitors remained very high in 2025 (83%, average rating 8.0), consistent with recent years.
- Due to the low sample of visitors to this facility and high margins of error, there were no significant differences between residents' demographic groups.

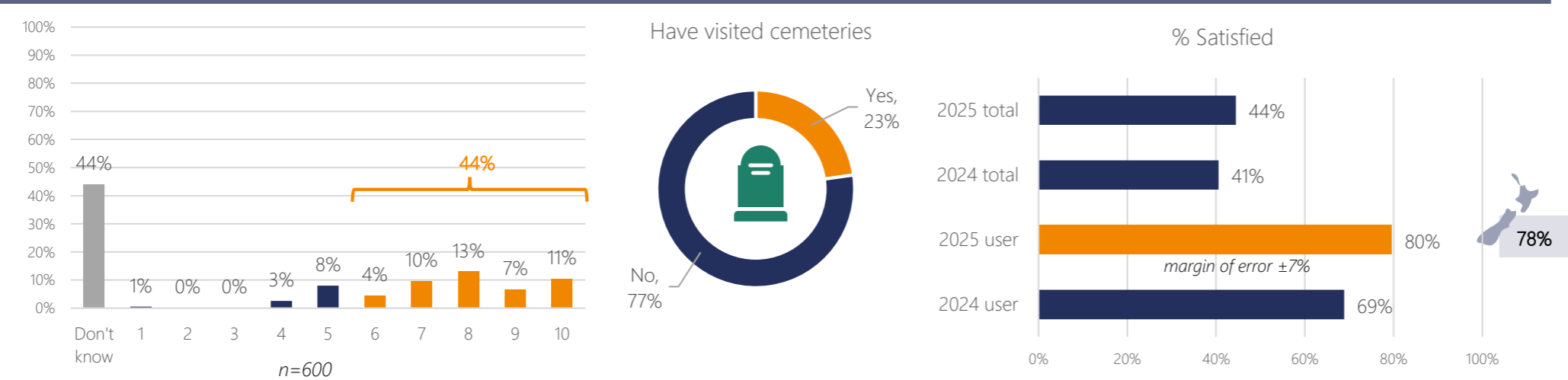


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

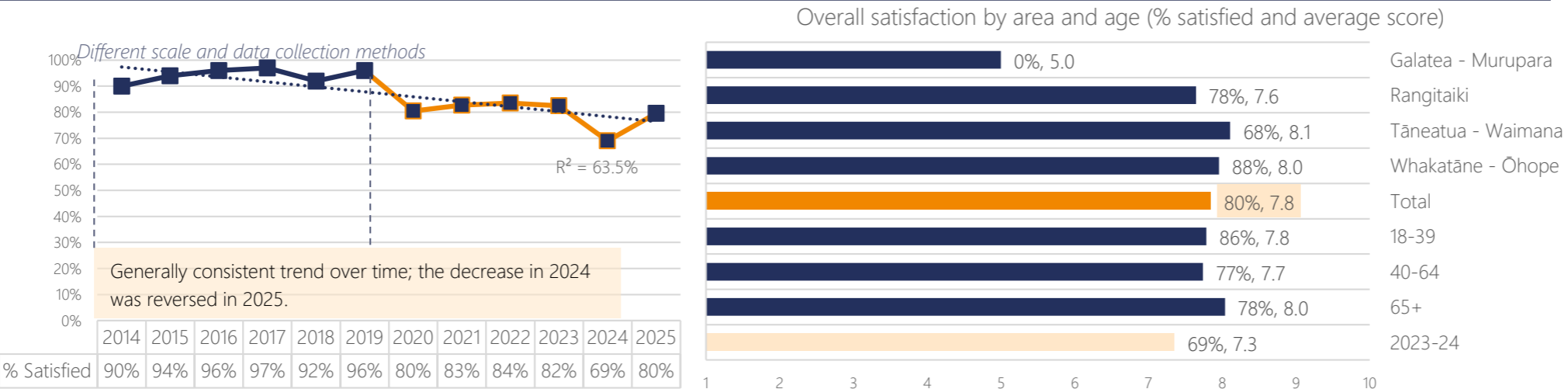
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Cemeteries overall



- Visits to cemeteries remained low in 2025, just 1-in-4 residents (23%) reporting this (similar to previous years).
- 4-in-5 (80%) of these residents were satisfied with cemeteries overall – rebounding back from the historical low of 2024.
- Low subsample sizes of visitors limit comparisons across segments; however satisfaction levels were similarly high across age groups in 2025.

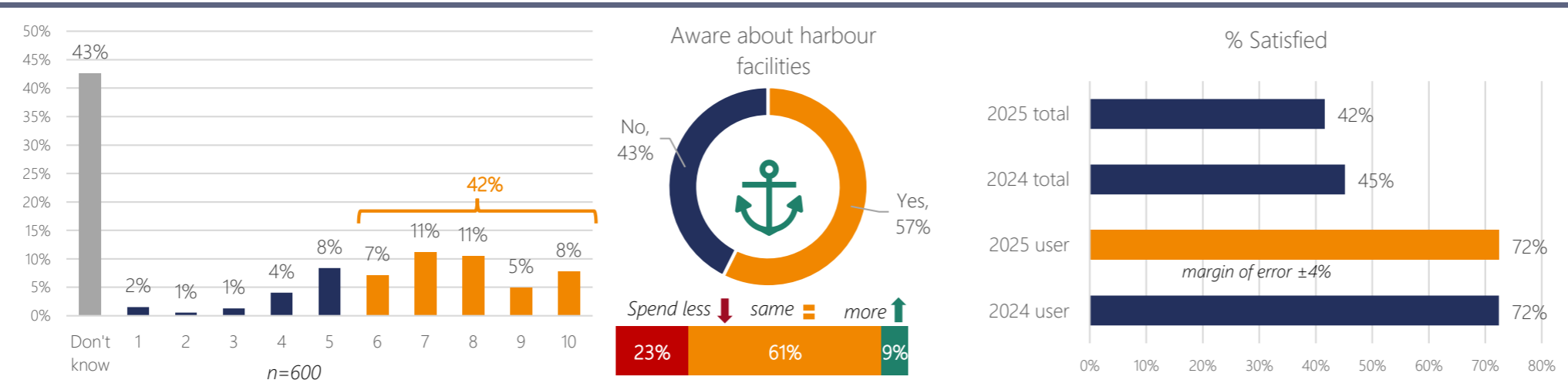


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

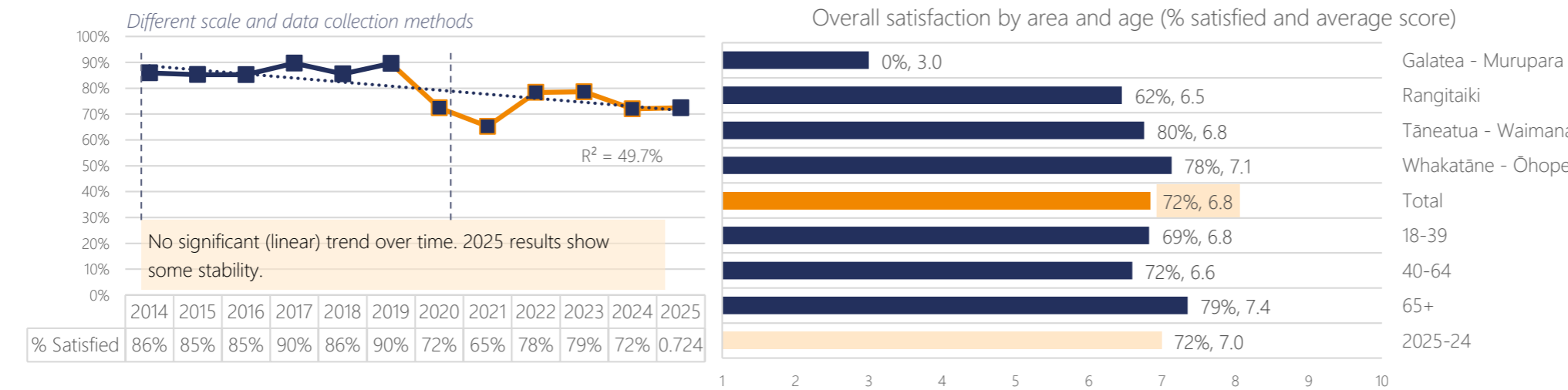
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Boat ramps and wharf facilities (new wording in 2022).



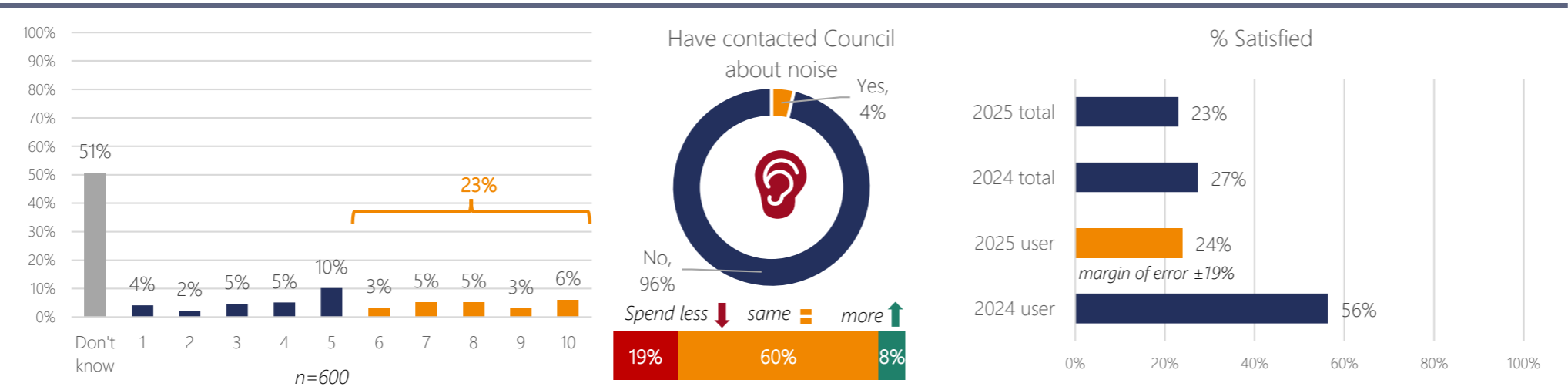
- Awareness of harbour and wharf facilities remained low in 2025, with 2-in-5 residents (42%) unsure about these, and just 57% providing a rating (similar to 2024).
- 72% of residents who were generally aware of these facilities were satisfied, similar to 2024 but still below 2022-23 levels.
- There were few significant differences across community segments in 2025.
- This remained a low priority for further Council spending in 2025; while 3-in-5 (61%) suggested the same funding levels were appropriate, 23% of respondents requested less spending – as such, remaining the 3<sup>rd</sup> most suggested service for lower spending.



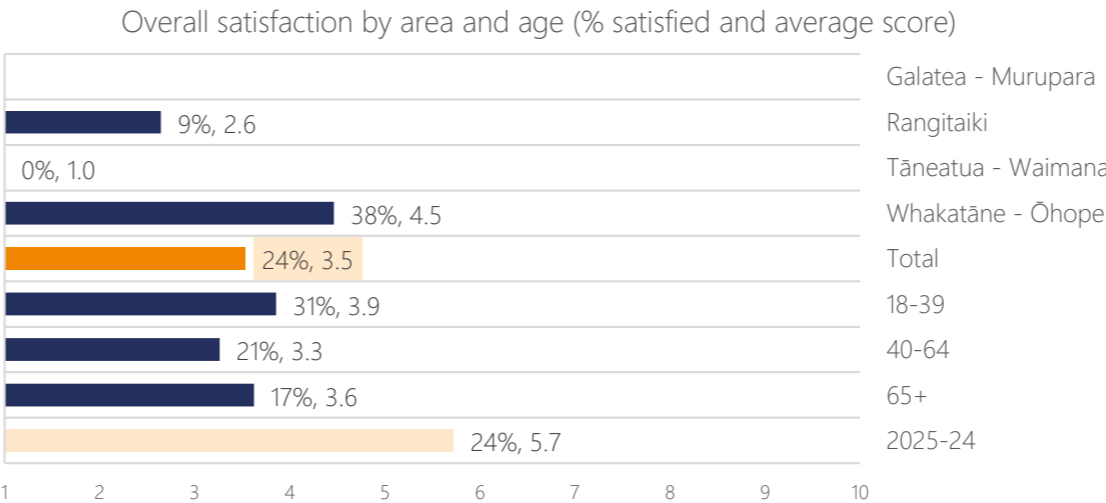
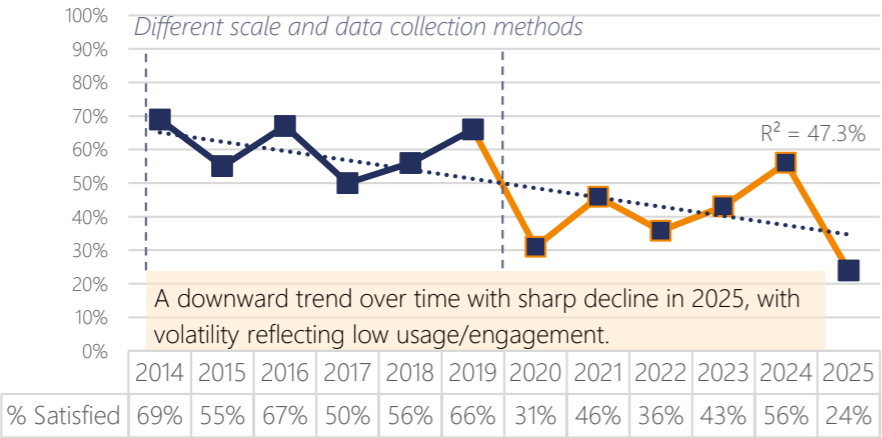
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Noise control



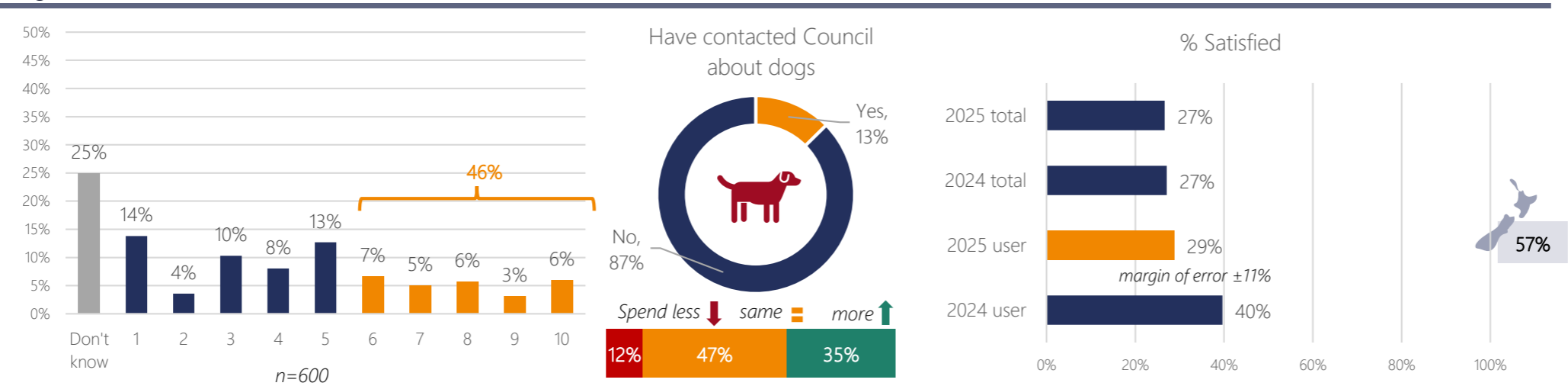
- Historically, relatively few residents contact the Council about noise issues – a trend continued in 2024 (4%, similar to 2024).
- Variability in satisfaction with noise control is evident over time due to low sample sizes and greater margins of error reducing comparability. As such, satisfaction among relevant residents fell again in 2025, to an historical low of 24%, following the recent peak of 56% in 2024.
- Observed differences between community segments were not significant due to noted low sample sizes.
- Overall, current funding levels for noise control were considered appropriate, with 60% of residents requesting no change. However, a higher percentage of residents were generally unsure about spending priorities for noise control (13%), with little change over time.



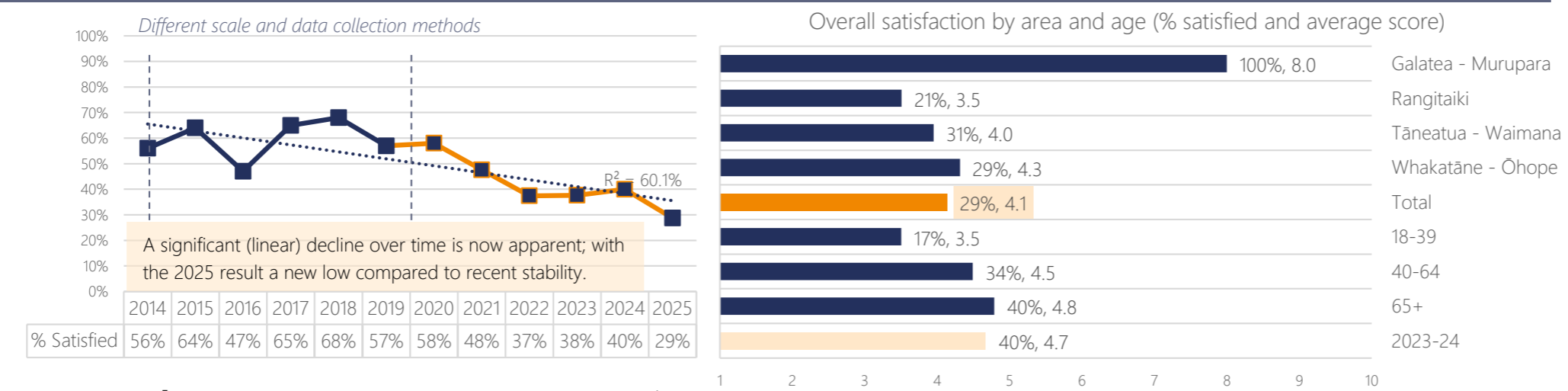
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Dog control



- In 2025, just 1-in-10 residents (13%) reported contacting the Council about dogs (similar to previous years), reflected in low knowledge about this service overall (25% unable to provide a rating).
- Of residents making contact about dog control in 2025, satisfaction (29%) fell to an historic low – the second-lowest rated service in 2025 - significantly below previous years and the current national benchmark.
- Low sample sizes of service users limited comparisons across community segments in 2025.
- This service remained a high target for more Council funding (third-highest in 2025), with 35% calling for more spending; similar to 2024 (34%) but above previous years (30% in 2023, 24% in 2022, 20% in 2021) – again reinforced by unprompted comments raising concerns about this issue in the District.

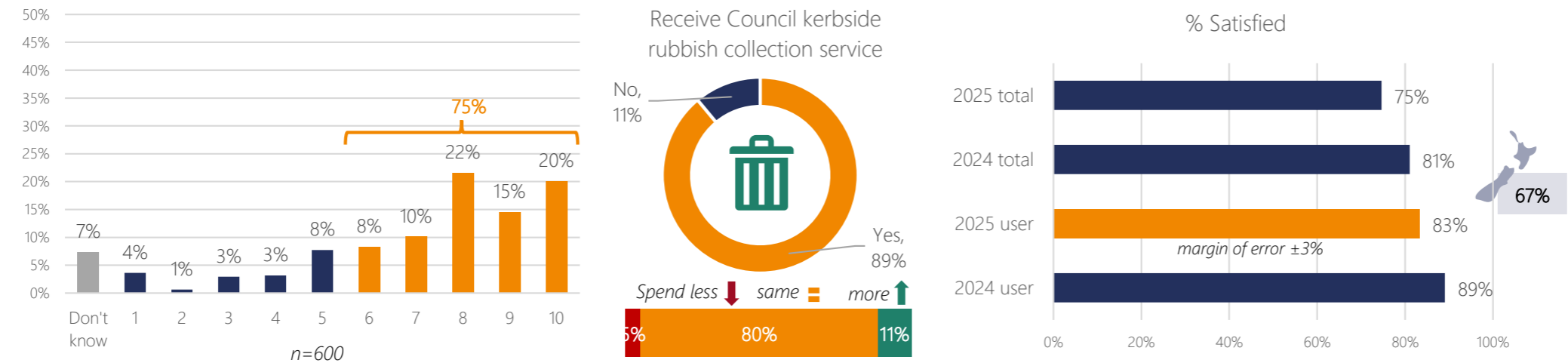


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

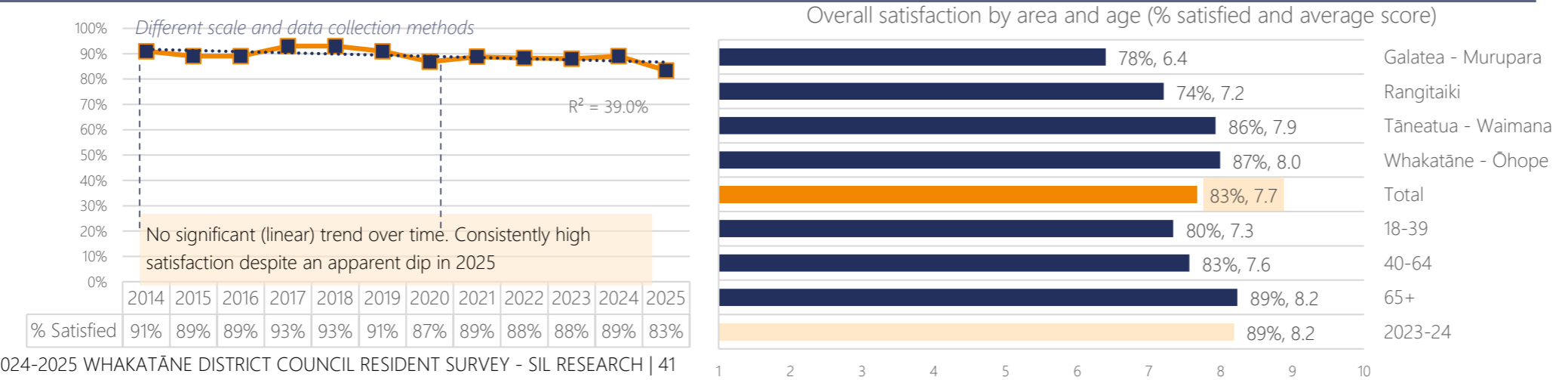
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Kerbside waste collection service

LTP MEASURE



- Most surveyed residents (89%) reported regular kerbside waste collection at their property in 2025 (consistent with previous years).
- As in 2023 and 2024, this remained a very highly rated service in 2025 (second-highest this year) with very high satisfaction (83%, 7.7 average rating) – still one of the most consistent results across all service measures historically, and exceeding the national benchmark.
- 1-in-5 (20%) rated this service the maximum 10-out-of-10 (32% in 2024).
- Satisfaction was generally consistent across community segments in 2025.
- High satisfaction levels were again reflected in the high proportion (80%) of residents preferring the same level of spending for waste collection services (77% in 2024), with the current service funding considered appropriate.

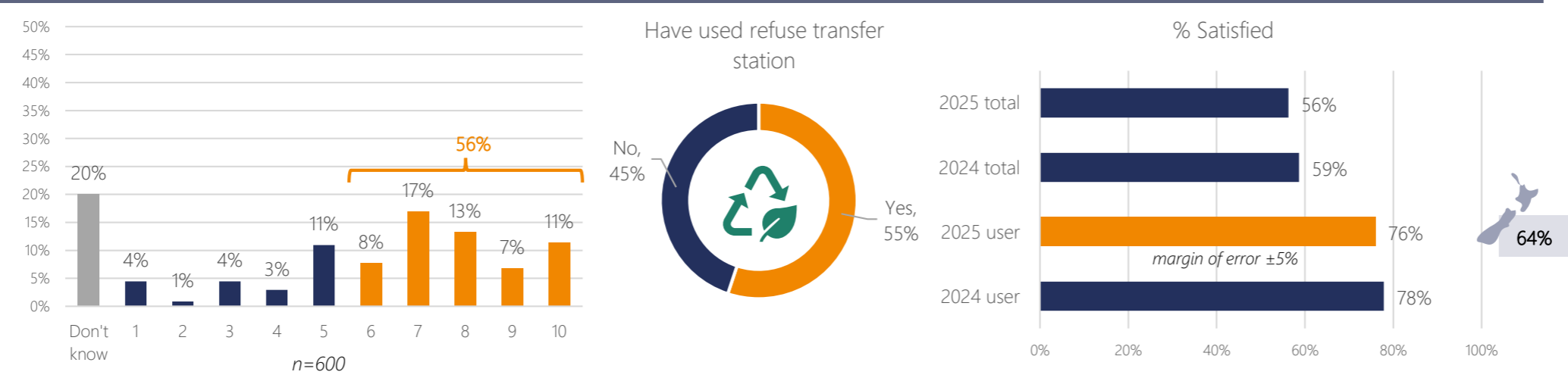


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

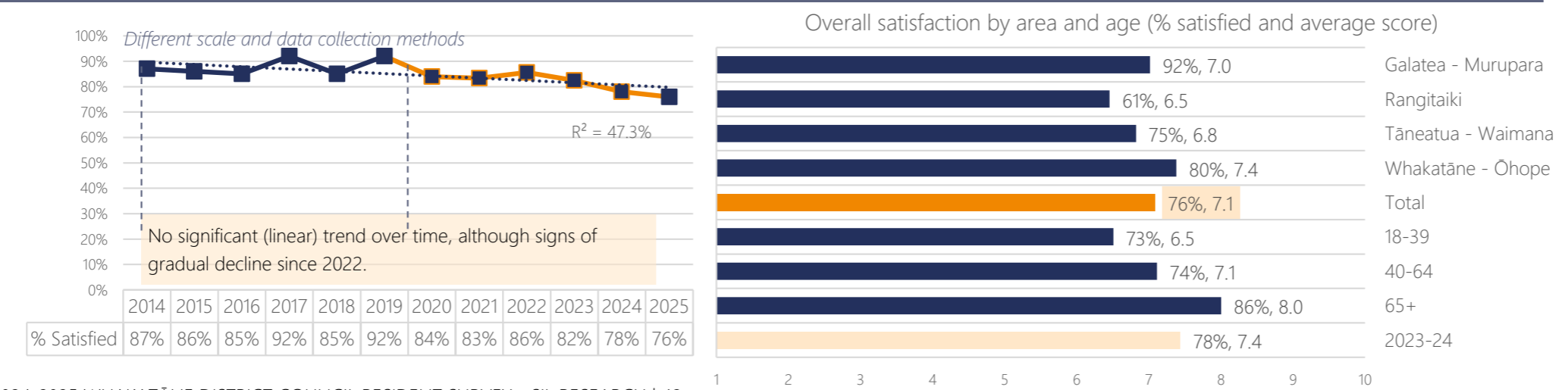
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Refuse transfer station facilities

LTP MEASURE



- In 2025, over half (55%) of residents reported using the District’s refuse transfer station facilities through the year (similar to 51% in 2024, up from 45% in 2023).
- 3-in-4 users (76%) were satisfied with these facilities (average rating 7.1) – however, this continued a gradual decline from 2022 (86%) despite remaining highly positive – and above the NZ benchmark – in absolute terms.
- Satisfaction was higher in Whakatāne-Ōhope and notably in Galatea-Murupara.

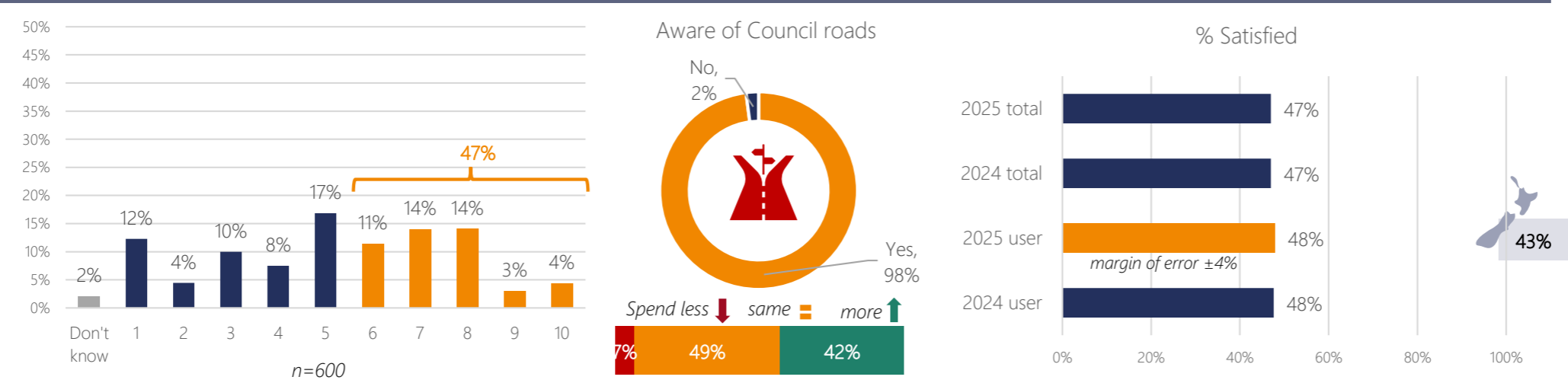


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

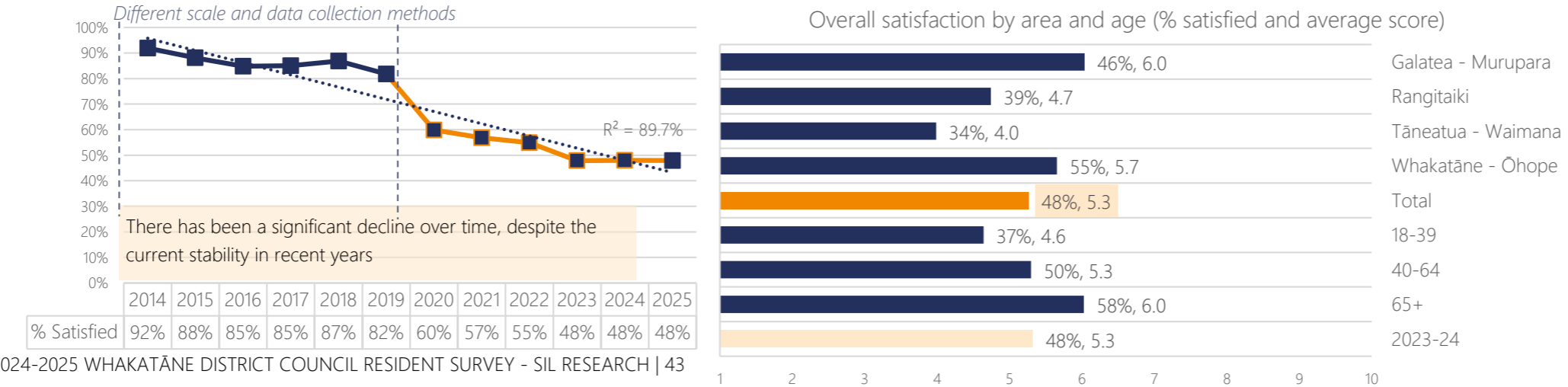
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Council roads overall



- Satisfaction with roads remained stable in 2025, with satisfaction at 48% for the third consecutive year – after the previous gradual decline from 2020.
- Note 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 – as reflected in the low national benchmark figure of 43% in 2025. Variations in satisfaction were also noted across the District, with lower ratings outside Whakatāne-Ōhope.
- Satisfaction with roads remained higher among older residents (aged 65+) (58%), especially compared to younger residents 18-39 (37%).
- Roads remained the highest spending priority, with 42% of respondents requesting more Council spending in this area in 2025 – however, this was lower than in previous years (48% 2024, 59% in 2023, 52% 2022). Roading issues continued to be raised in verbatim comments.

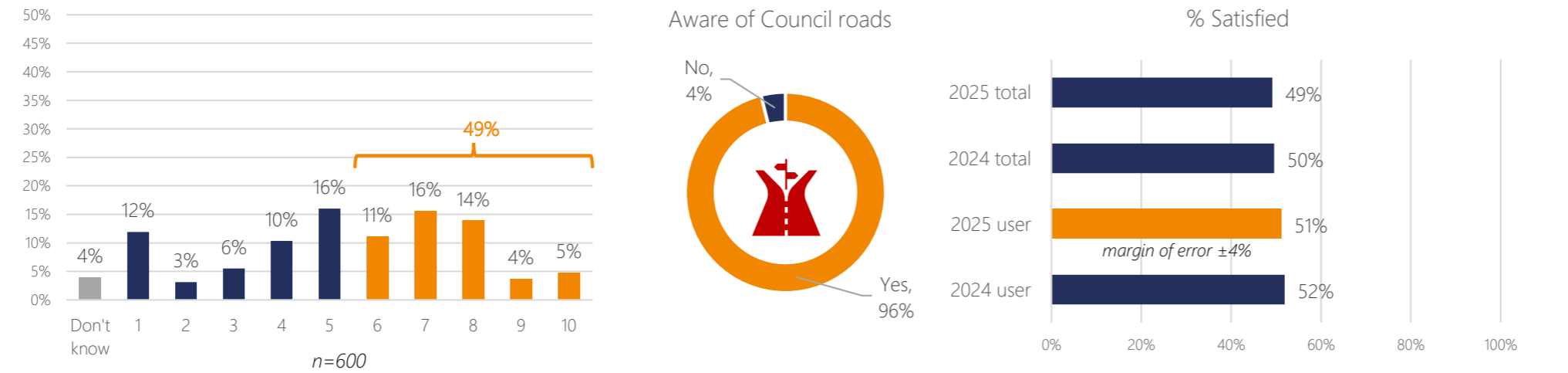


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

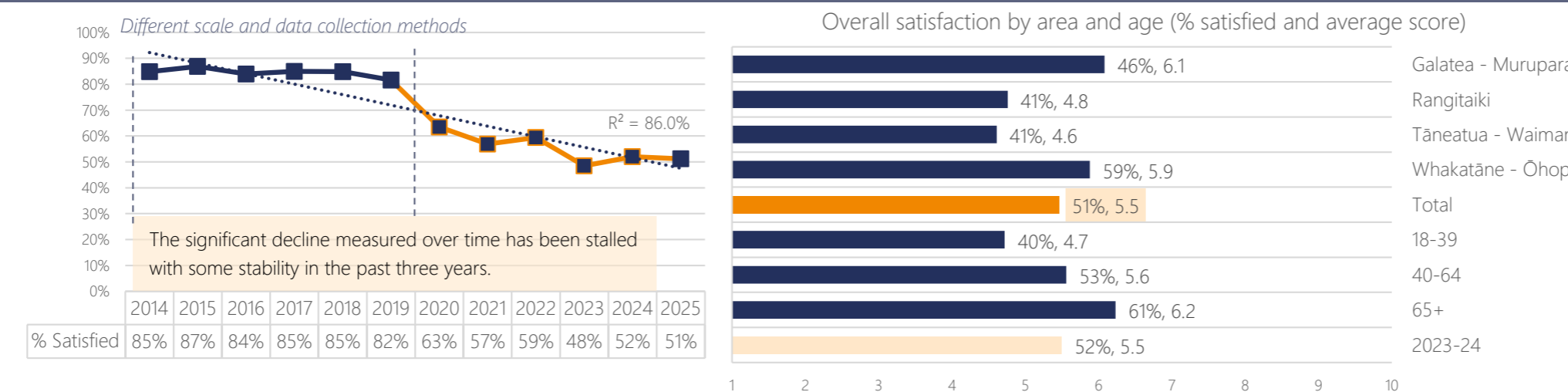
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

LTP MEASURE  
(aggregated)

Safety of Council roads



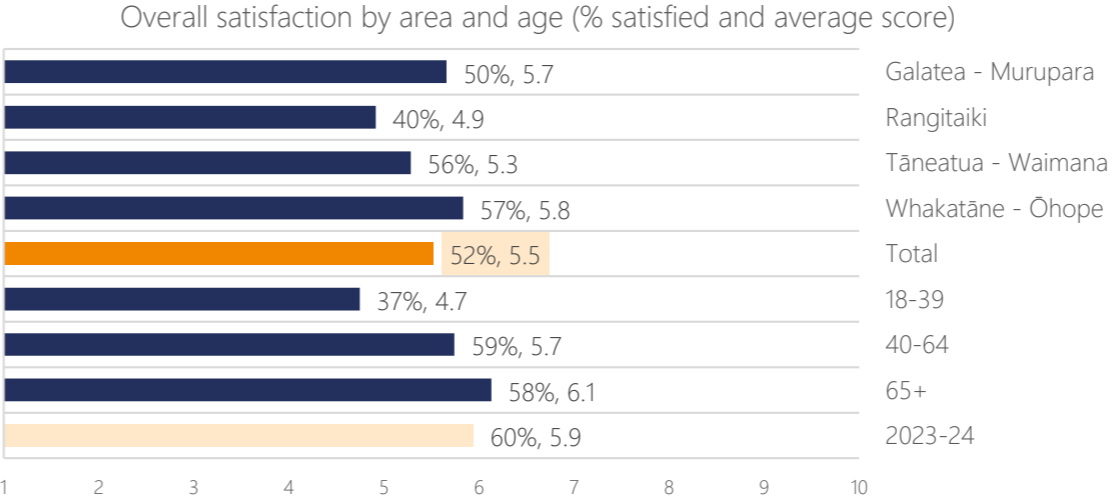
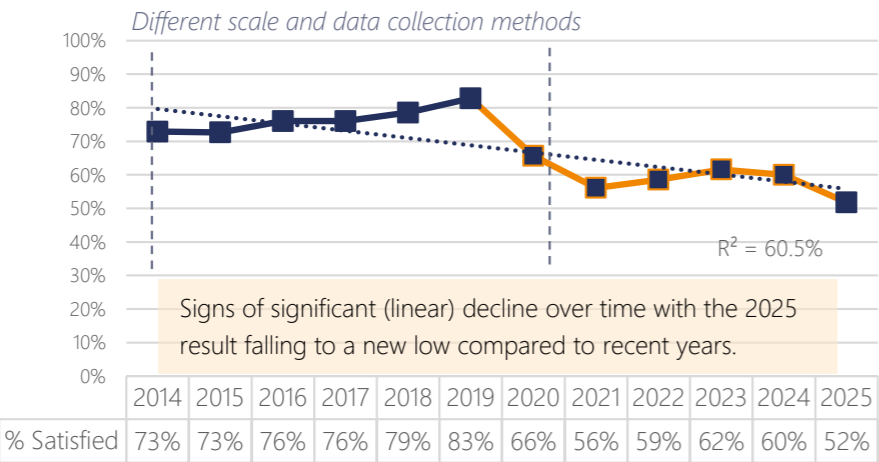
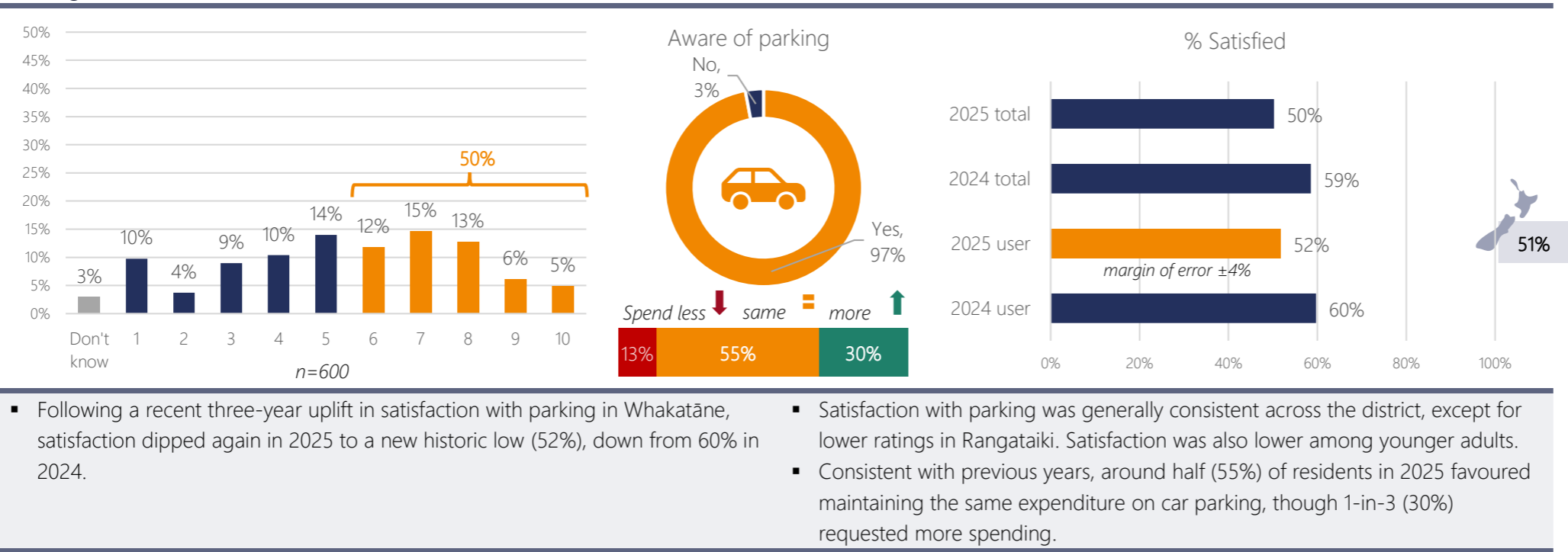
- Perceptions of road safety also saw a more stable three-year trend in 2025 (51%), compared to the previously measured decline from 2020.
- Again, satisfaction with road safety was lower in more rural areas outside Whakatāne-Ōhope.
- Overall, satisfaction with roads generally and safety of Council roads exhibited a strong correlation with provided ratings.
- Community feedback continued to highlight resident concerns about roading and related infrastructure needs and developments, particularly the ongoing demand for a second bridge in Whakatāne, the presence or need for speed calming, layout and speed limit changes, the condition of rural roads, and maintenance.



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Parking in Whakatāne

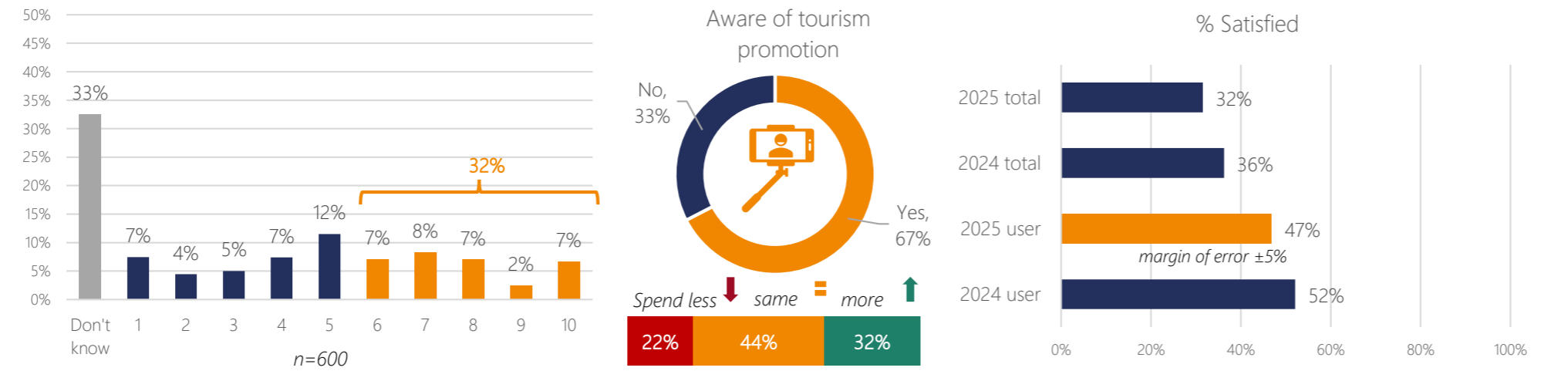


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

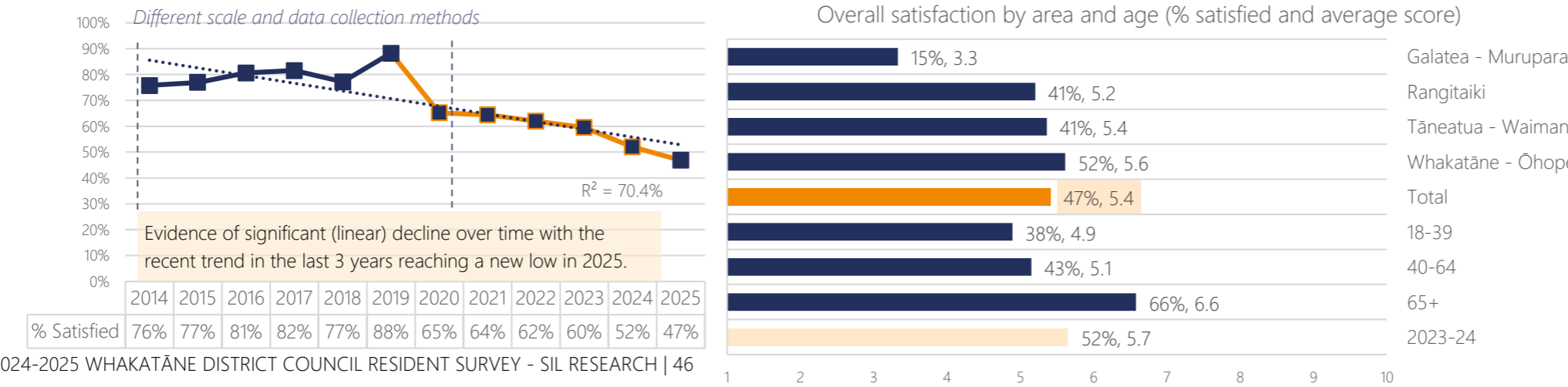
SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Tourism promotion

LTP MEASURE



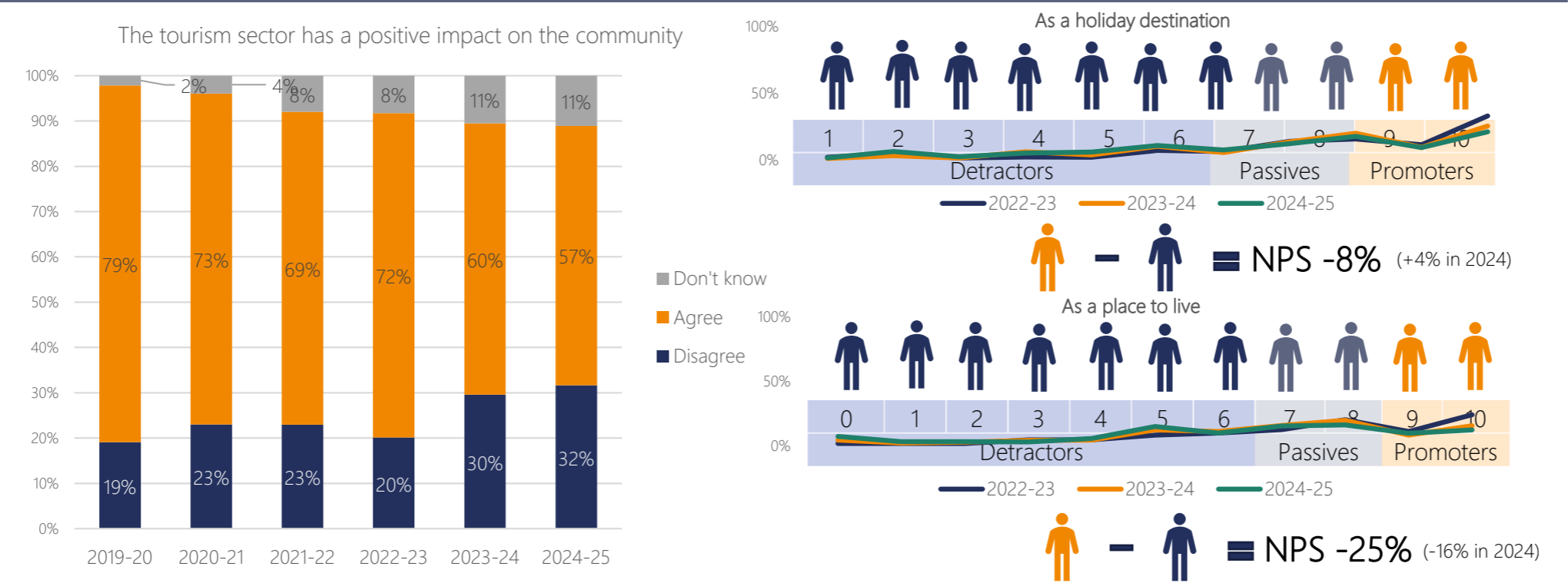
- In 2025, 2-in-3 respondents (67%) were able to rate Council’s support of tourism promotion. Just under half (47%) of these residents were satisfied with this service (5.4 average rating); nevertheless, this continued an ongoing downward trend measured since 2021 - reaching a new historic low following the previous low of 2024.
- Notable differences were apparent in attitudes towards tourism promotion – with lower satisfaction outside Whakatāne-Ōhope, and residents under 65.
- Reflecting these sentiments, Council spending preferences for tourism promotion remained divided – while 44% wanted the same level of funding maintained, this was the 7<sup>th</sup>-most requested area for an increase (32%, up from 26% in 2024), and also the 6<sup>th</sup>-most area highlighted for less spending (22%, no change from 2024).



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

# SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Whakatāne as a holiday destination and tourism impact on the community



- Overall, many residents were likely to recommend the Whakatāne District as a holiday destination; with 30% providing top ratings of 9 and 10 – although down from 35% in 2024 and 44% in 2023.
- However, the decline in these top ratings had a direct impact on the anecdotal NPS (Whakatāne District as a holiday destination), with this falling into negative territory for the first time, at -8% in 2025. This was, however, a continuing downward trend observed in recent years (+28% in 2021, +24% in 2022, +20% in 2023, +4% in 2024).
- Nevertheless, this score remained above the recommendation of Whakatāne District as a place to live - continuing to fall and remain negative for a second consecutive year (NPS -25%, from -16% in 2024, +3% in 2023, +7% in 2022).
- As seen on p.45, 47% of residents were satisfied with Council's support of tourism promotion – albeit declining in recent years (from 65% in 2020). In this context, while the majority (57%) of residents in 2025 continued to believe that tourism has a positive impact on the community, this optimism has also diminished more recently (down from 60% in 2024, and 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.

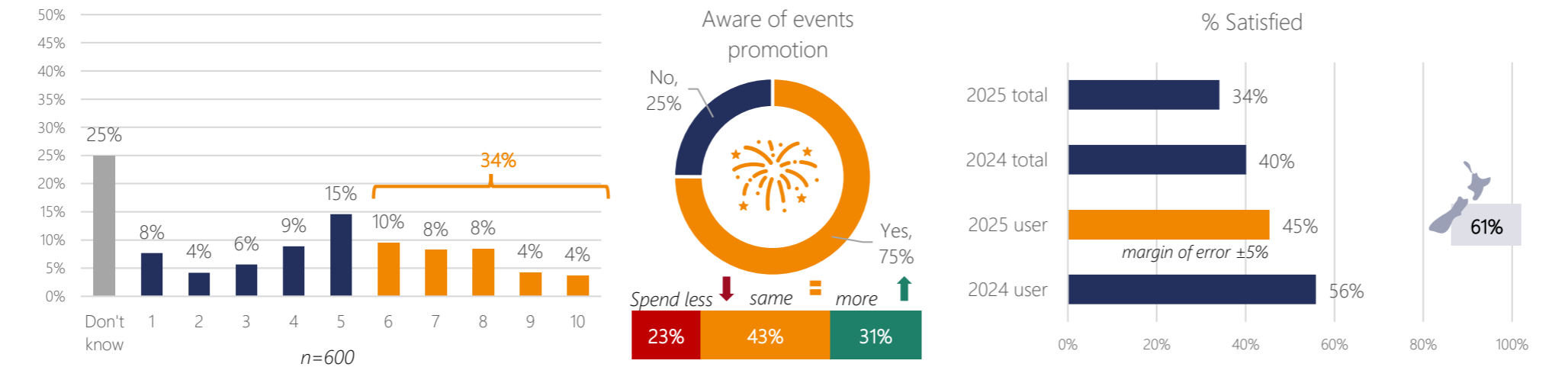
The Net Promoter Score (NPS) question asks respondents to rate the likelihood that they would recommend Whakatāne as a place to live on a scale from 0 ('not at all likely') to 10 ('extremely likely'). The reported score is calculated by subtracting the percentage of detractors (ratings 0 to 6) from the percentage of promoters (ratings 9 to 10).

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

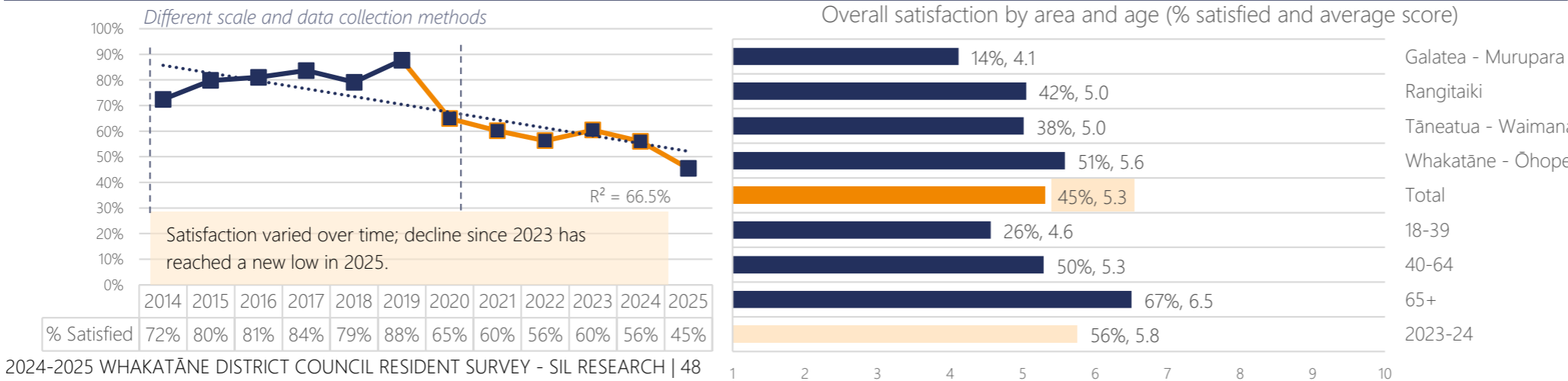
# SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Efforts to enable and promote events

LTP MEASURE



- In 2025, 3-in-4 residents (75%) rated Council's efforts to enable and promote events; with uncertainty still high within the community (25% unsure, 28% in 2024).
- Under half (45%) of residents who provided a rating were satisfied with event promotion (average rating 5.3) – a new historic low following a drop from 2024 (56%) – and below the national benchmark.
- Previously measured differences in tourism promotion perceptions continued, with lower satisfaction among younger residents, and those from Tāneatua-Waimana and Galatea-Murupara.
- As for tourism promotion, there were divided opinions on future Council funding for events promotion, with 43% of residents preferring maintained levels of spending, but 1-in-3 (31%) seeking more funding.

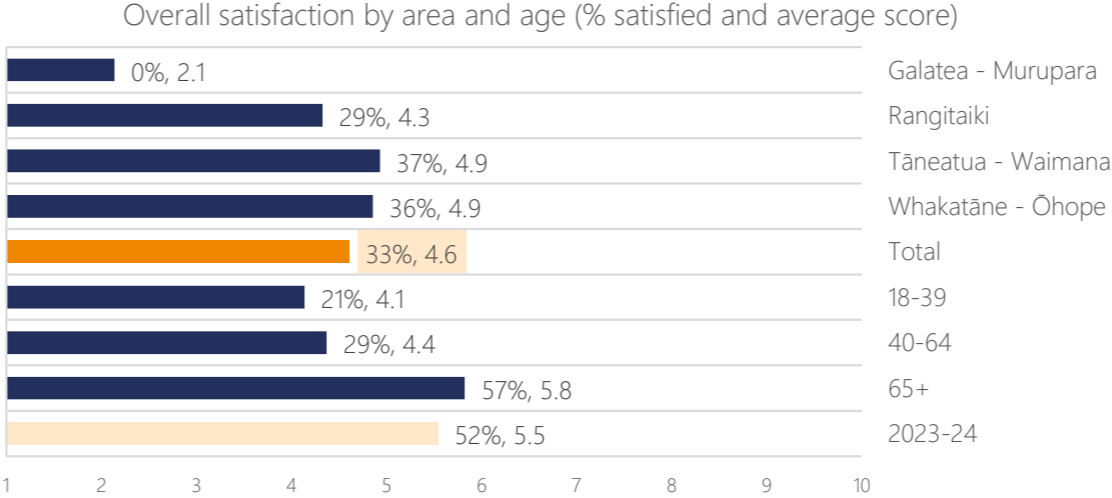
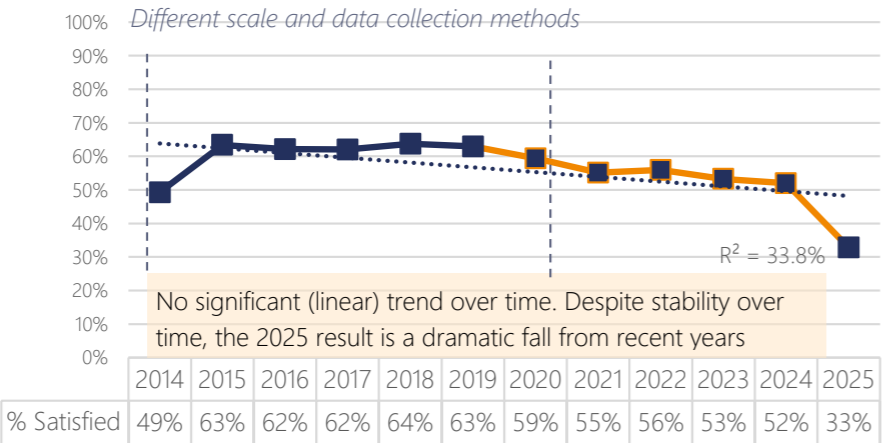
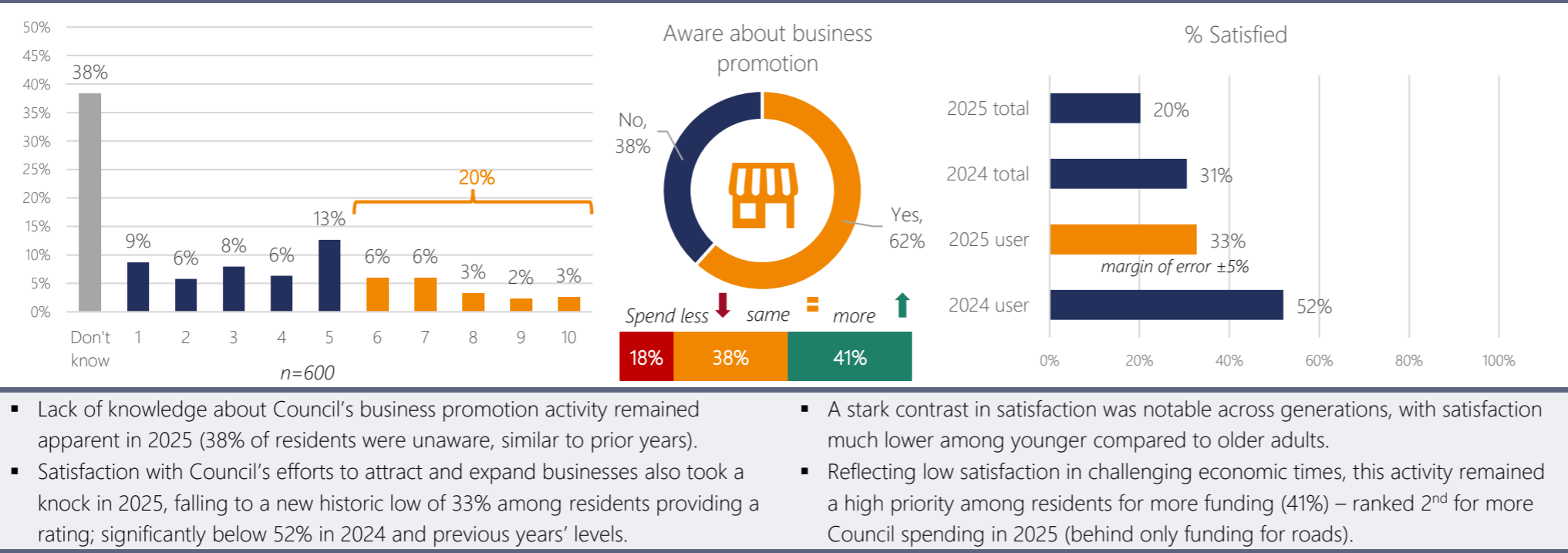


7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Business promotion

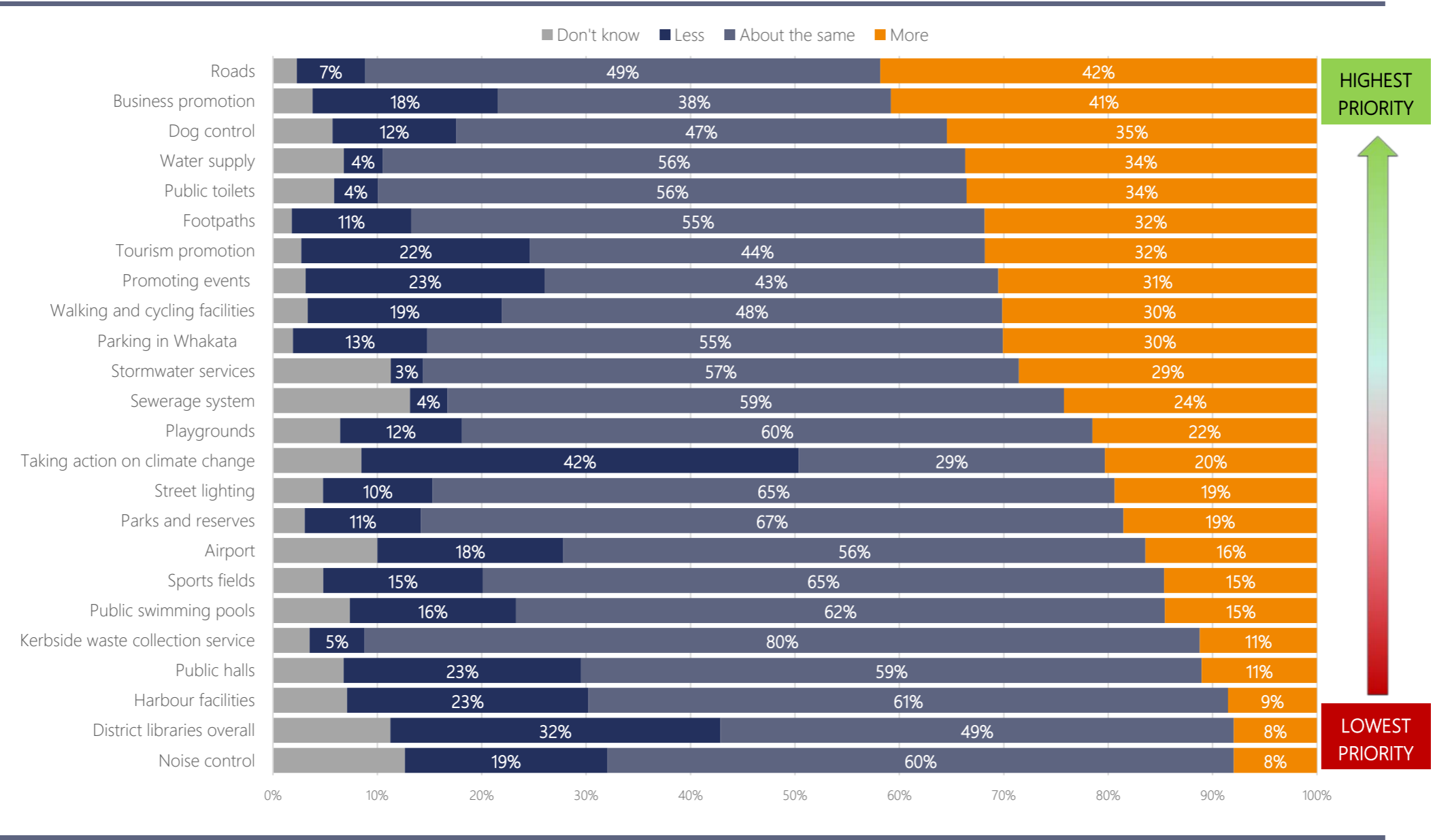
LTP MEASURE



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

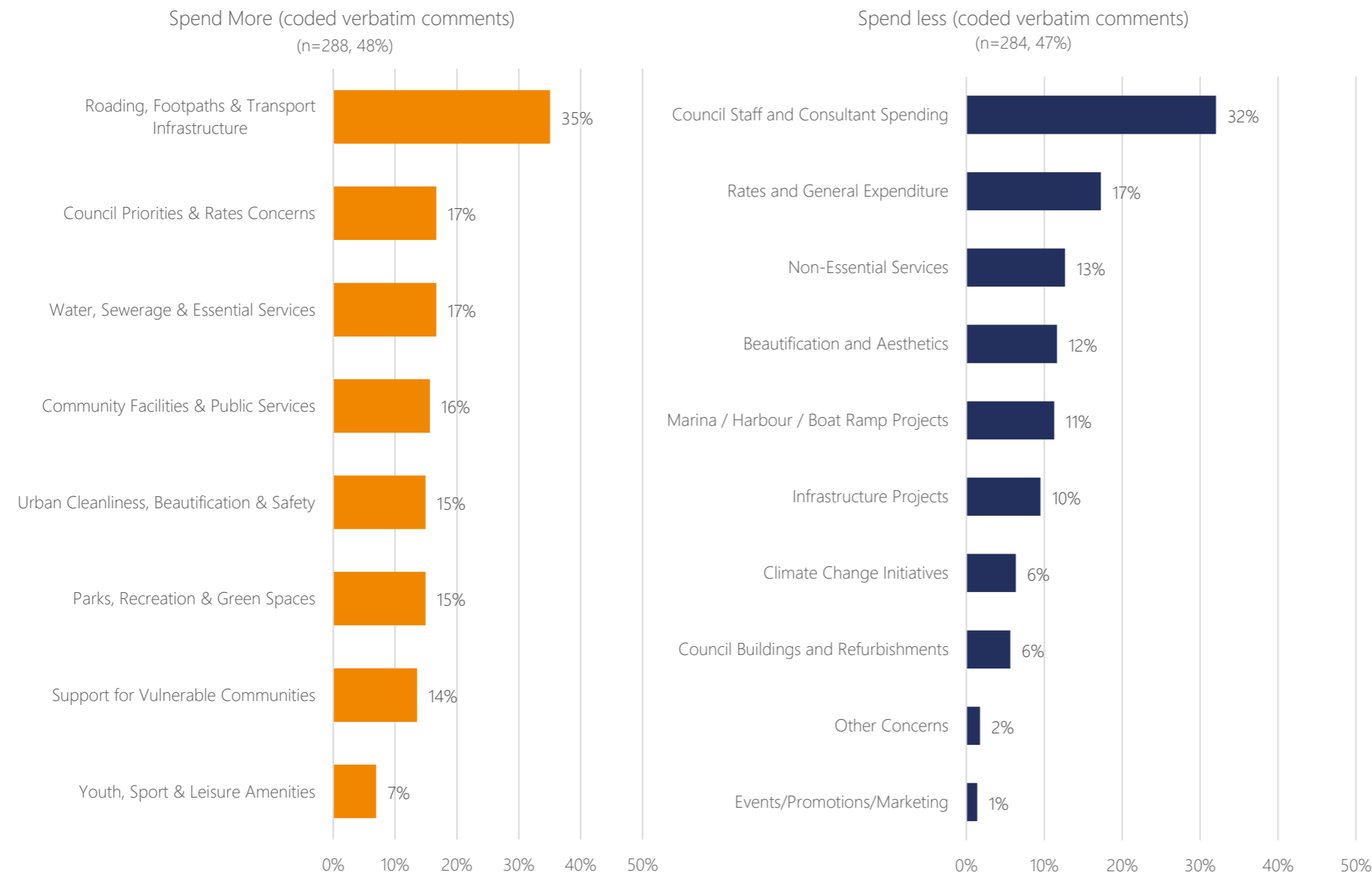
Spending priorities



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

- Consistent with previous years, the highest priority investment area in 2025 was roads (42%, down from 48% in 2024 and 59% in 2023). Business promotion (41%), dog control (35%, ranked 7<sup>th</sup> in 2024), water supply (34%) and public toilets (34%) rounded out the top five priorities for residents; with all but dog control also in the top five in 2024.
- Unprompted (free text) comments from residents again highlighted roading and transport infrastructure as the leading areas for further development. Council priorities and concerns about rates generally also remained frequently mentioned on a spontaneous basis (see chart on following page).
- Again reflecting a now persistent theme of residents’ concerns around rates increases and Council spending, 2025 continued 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 spending focus fell again, another 6% lower in 2025 than in 2024 (and now 17% lower than in 2023). Overall, three service areas saw support for more funding fall by 5%-points or more; in addition to roads, this included public toilets (down 5%), and climate change action (down 11%, also down 17% from 2023).
- In this context, more respondents did suggest further increased spending in a few service areas, particularly around promoting the district to boost economic performance: business promotion (41%, up from 36% in 2024), tourism promotion (32%, up from 26% in 2024), and event promotion (31%, also up from 26% in 2024).
- Again, reflecting broader spending concerns, almost half (47%) of residents provided further spontaneous comments to decrease Council spending. Priority areas for reduced spending were Council staffing and consultant spending generally, general expenditure that impact on rates increases, and what residents perceive to be non-essential services and/or focus on aesthetic improvements or beautification (see chart on following page).
- Roads remained a high spending priority across most areas in the district, especially in Rangitāiki (48%).
- Galatea-Murupara residents typically wanted greater increased funding in many service areas, including business promotion (73%), tourism promotion (63%), sports fields (52%), and event promotion (45%).
- Dog control and public toilets in 2025 were a higher priority in Tāneatua-Waimana (44% and 46%, respectively).
- Footpaths and water supply were a greater concern in Whakatāne-Ōhope (36% and 38%, respectively).

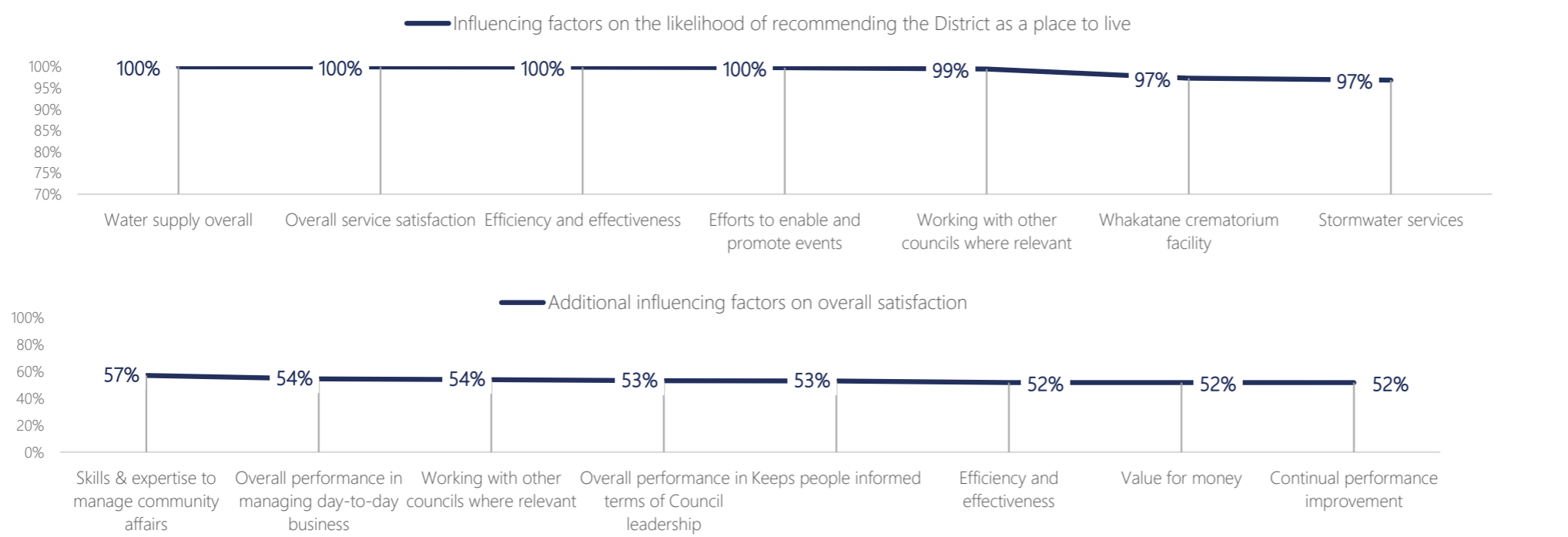
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

SATISFACTION WITH COUNCIL SERVICES AND FACILITIES

Potential improvements



- 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.
- Council reputation continued to be in the spotlight for residents, with financial management a high concern in the current economic climate with clear impacts on overall satisfaction with Council performance. Communication, financial and general management were of prime consideration for residents given the rates implications of recent Long Term Plan spending decisions.
- Seven areas were identified as having a significant impact on the likelihood of recommending the District as a place to live: water supply, overall service provision, general efficiency and effectiveness, event promotion, cooperation with neighbouring councils, Whakatāne crematorium, and stormwater services.
- In light of the above concerns and considerations, public sentiment around council daily management, financial control and overall leadership had a clear and direct impact on resident satisfaction.

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

CONTACT WITH THE COUNCIL

Satisfied with direct contact – 48%  
Satisfied with community board member contact – 80%  
Satisfied with customer service front desk – 73%

COUNCIL POLICIES AND DIRECTIONS

11% - Liked or approved recent Council actions,  
decisions or management  
60% - Disliked or disapproved recent Council  
actions, decisions or management

COUNCIL REPUTATION

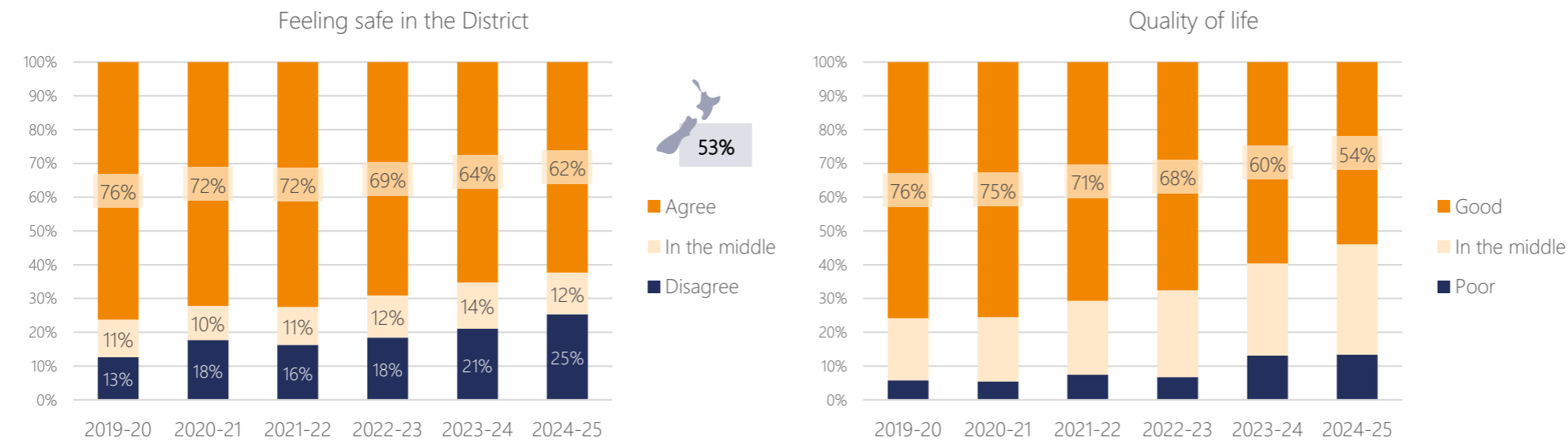
Communication with residents – 30%  
Leadership – 29%  
Day-to-day management – 29%

OTHER FINDINGS  
2025

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

LIFE IN THE DISTRICT

Perception of safety and quality of life in the District



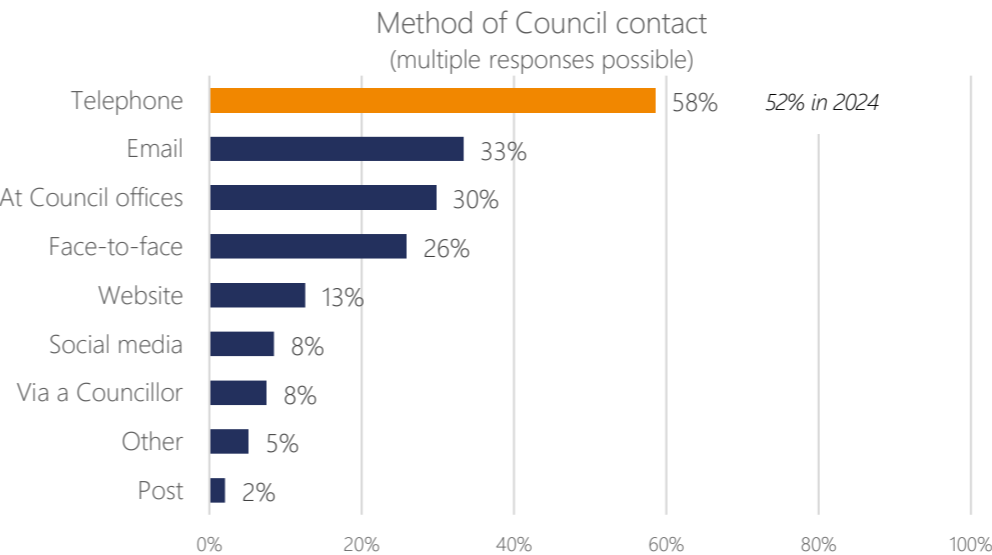
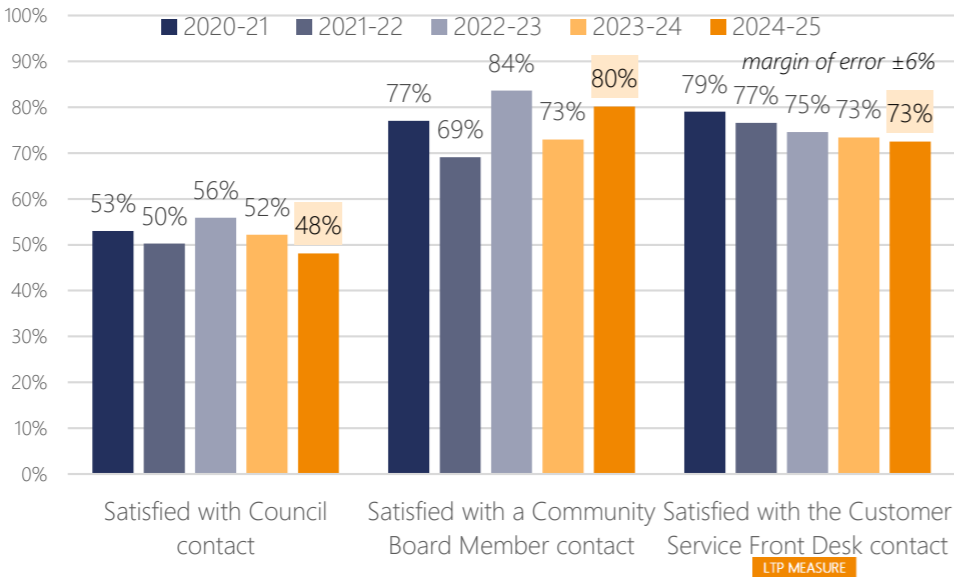
- Overall, 3-in-4 residents (74%) in 2025 felt that the Whakatāne District is generally a safe place to live, to some extent (similar to 78% in 2024). This, however, continues a gradual decline in safety perceptions in recent years, with the proportion who agreed (somewhat or strongly) they feel safe (currently 62%) falling to its lowest level since 2019-20 (76%) – with small drops year-on-year. Nevertheless, feelings of safety in Whakatāne district remain above the national benchmark (currently 53%).
- Respondents aged under 65 typically less likely to feeling safe than those aged 65+. Safety perceptions were also lower in Tāneatua-Waimana (52%) and Rangataiki (56%).
- Just over half (54%) of residents in 2025 believed their quality of life was ‘good’ to ‘very good’. However, this measure also continued to exhibit a gradual downward trend, falling from 76% in 2020 but more notably in the last two years.
- Again, satisfaction with quality of life increased with markedly with age; rated good by 73% of 65+ year olds compared to those aged 40-64 (51%) and 18-39 (43%). Perceptions of life quality were also lowest in Rangataiki (47%), particularly compared to Galatea-Murupara (63%).

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

CONTACT WITH COUNCIL

Contacted the Council, a community board member or customer service front desk

LTP MEASURE

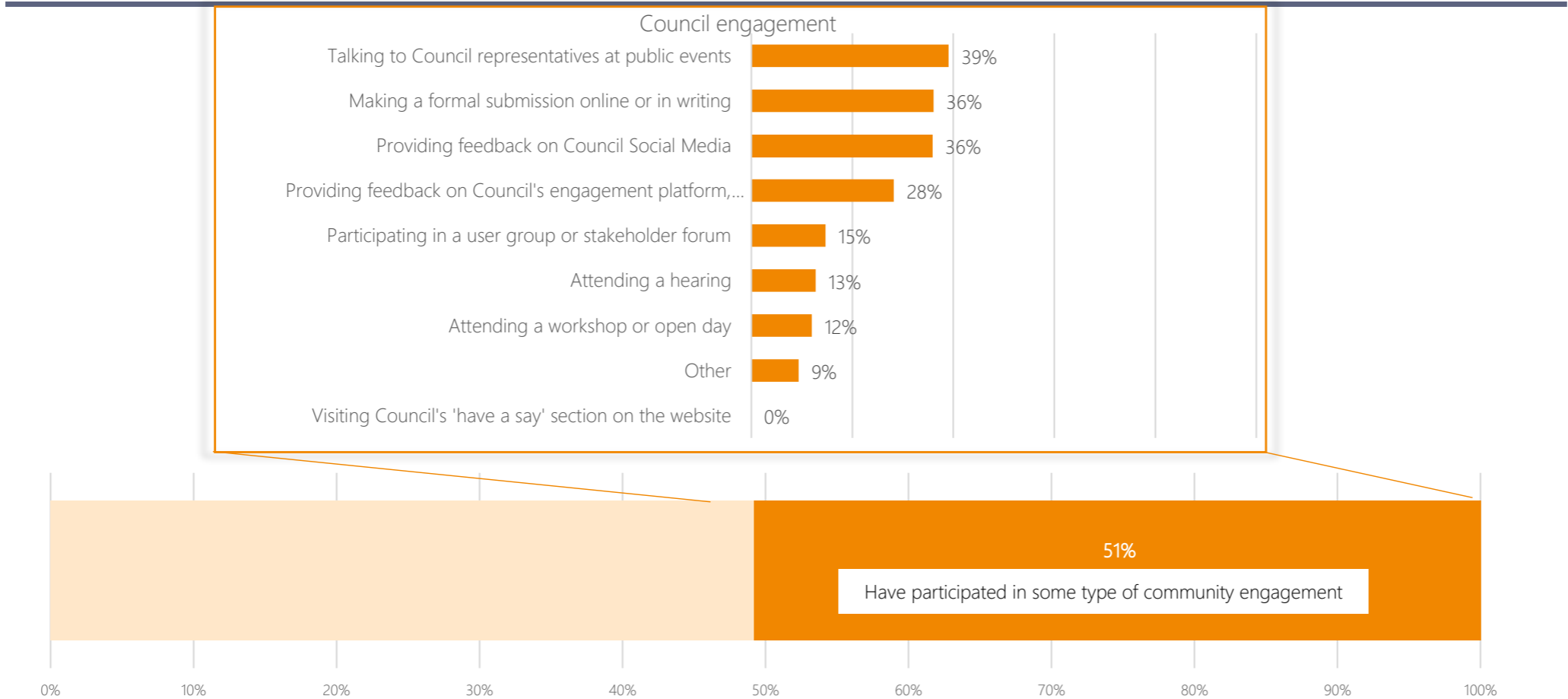


- Overall, half (50%) of all residents in 2025 stated they had contacted the Council throughout the year (46% in 2024) – the highest rate since 2021.
- 'Telephone' remained the primary contact method (58%, 52% in 2024), with 'email' (33%, 34% in 2024) and personal contact also important.
- Younger residents (18-39) remained more likely to contact the Council by phone (77%), with website (19%) and social media (10%) also more prevalent. Older residents still preferred face-to-face or office visits.
- In 2025, half (48%) of residents who contacted the Council directly were satisfied with this contact (generally consistent with previous years).
- There were no significant differences across community segments in this regard.
- 1-in-7 (15%) of residents in 2025 reported contacting a Community Board Member (up slightly from previous years, with 10% in 2024), and almost half (46%) had contacted the customer service front desk (36% in 2024).
- Whakatāne-Ōhope and Rangitāiki residents remained less likely to contact a Community Board Member, compared to residents in other areas – with contact highest in Galatea-Murupara.
- In contrast, Galatea-Murupara residents were least likely to contact the customer service desk, with this most likely for Rangataiki residents (29% vs 54%). Māori were more likely than others to make contact generally.
- Satisfaction with Community Board contact in 2025 (80%) improved from 2024 (73%).
- Satisfaction with customer service contact in 2025 (73%) was consistent with 2024. The gradual downward trend over the last five years has not been statistically significant.

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

COMMUNICATION AND COMMUNITY ENGAGEMENT

Community engagement

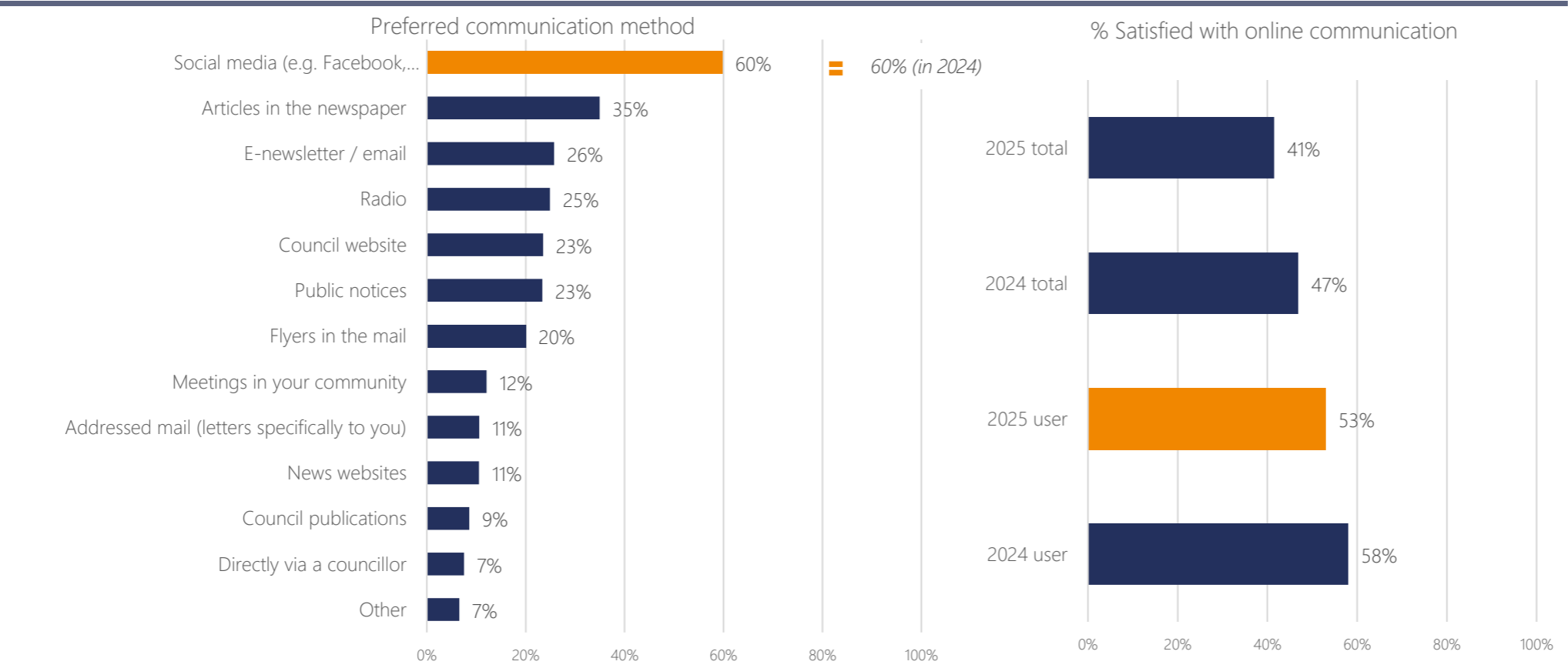


- Half (51%) of residents in 2025 reported taking part in community engagement of some kind (similar to 54% in 2024, above 43% in 2023).
- Most typically, engaged residents reported talking to Council reps at public events (39%, compared to 25% in 2024), making a formal submission (36%, 29% in 2024), or providing feedback on social media (36%, 37% in 2024).
- The remaining half (49%) of residents stated they had not engaged in any Council-related activities; this remained more likely among older residents (67% of those aged 65+).

7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

COMMUNICATION AND COMMUNITY ENGAGEMENT

Preferred method of communication

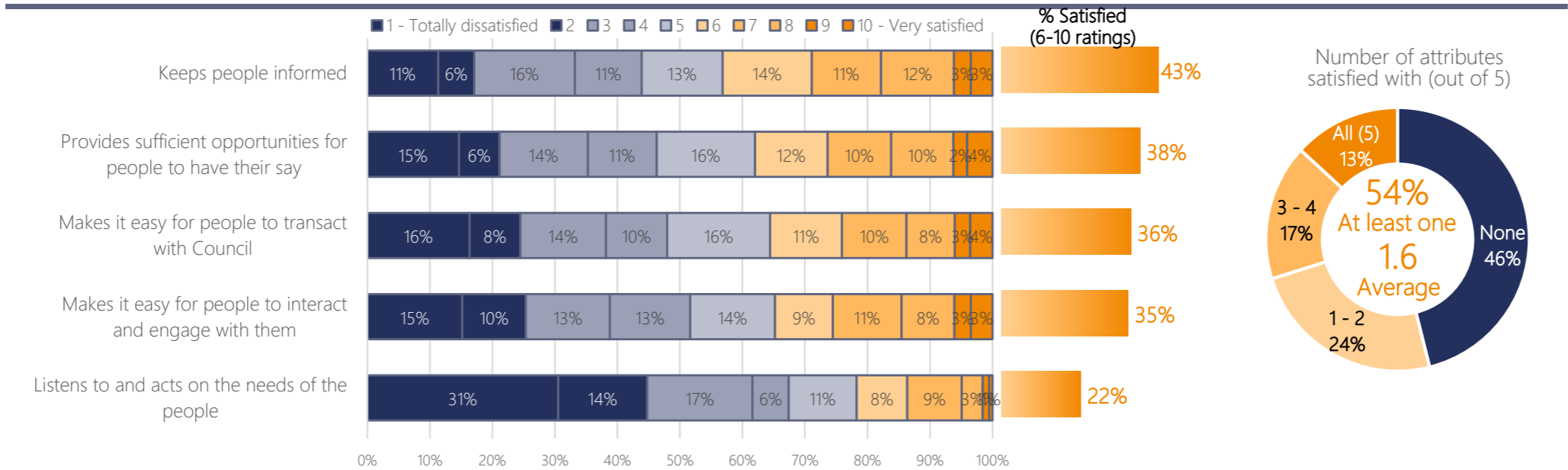


- ‘Social media’ remained the most preferred method for Council communications, for 3-in-5 (60%) of residents in 2025 (no change in the past years).
- Social media remained significantly more preferable for younger compared to older residents (79% 18-39, 61% 40-64, 33% 65+); though growing in prominence among those aged 65+ (up from 30% in 2024, 14% in 2023).
- Newspaper articles were still the second-most preferred channel overall (35%, compared to 33% in 2024), and remained most preferred by residents aged 65+ (59%, 64% in 2024; with 25% 18-39, 28% 40-64).
- Social media represented the most preferred across all wards. Possibly reflecting distribution/access, newspaper articles remained less preferred in Galatea-Murupara and Tāneatua-Waimana – electronic comms (email, Council website) had greater utility in these areas, respectively.
- Half (53%) of residents aware of online Council communications were satisfied with this online service and information provision, although this has dropped somewhat in recent years (from 66% in 2022).

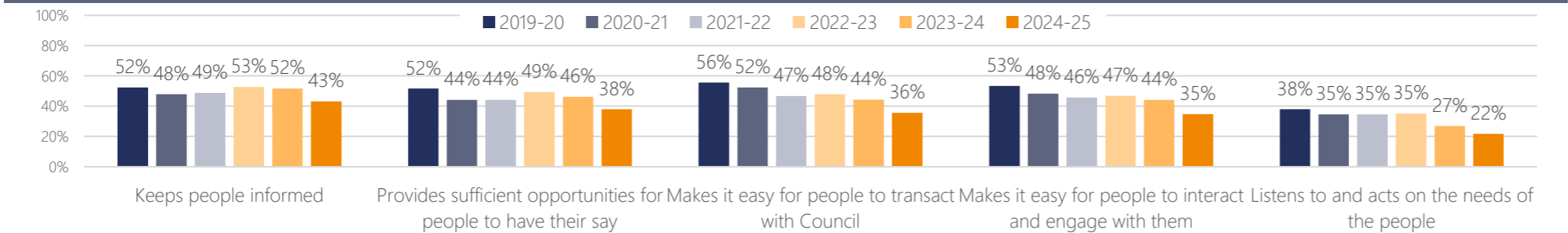
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

COMMUNICATION

Communication with residents



- Residents had low satisfaction with communication attributes in 2025, with some decline since 2024. Overall, half (54%) agreed with at least one of the five statements (61% in 2024), while just 13% agreed with all five (18% in 2024).
- Satisfaction with most communication attributes was down from 2024.
- 'Keeps people informed' (43%) was the most satisfactory attribute, though lower than in 2024 (52%) and the peak in 2023 (53%).
- In contrast, 'Listens to and acts on the needs of the people' (22%) remained the least satisfactory attribute, and also down from previous years.
- Satisfaction with most communication attributes remained higher for older (65+) residents than younger residents, on average. 'Keeps people informed' again received the most consistent ratings across age groups.
- Ratings were typically lower in Rangataiki.



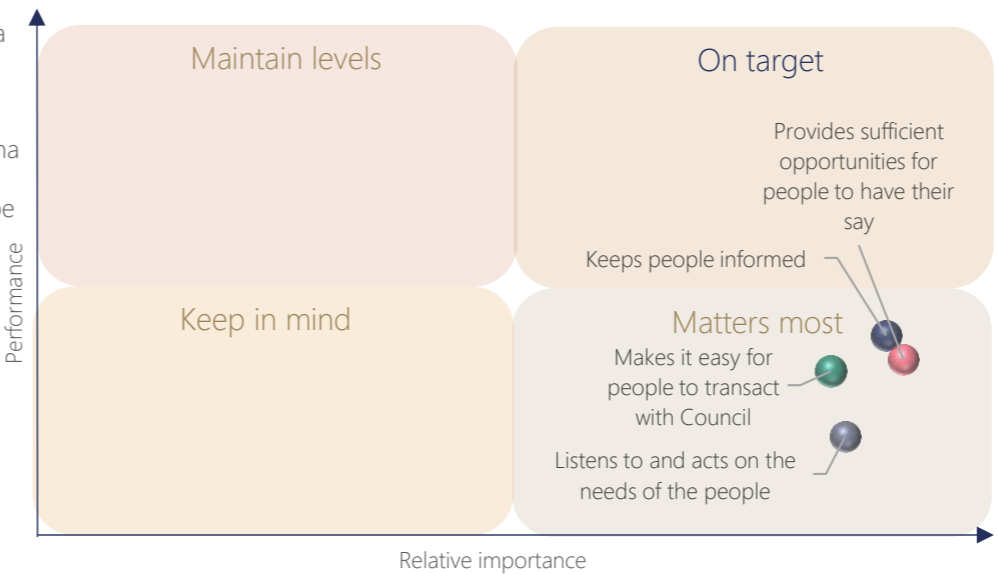
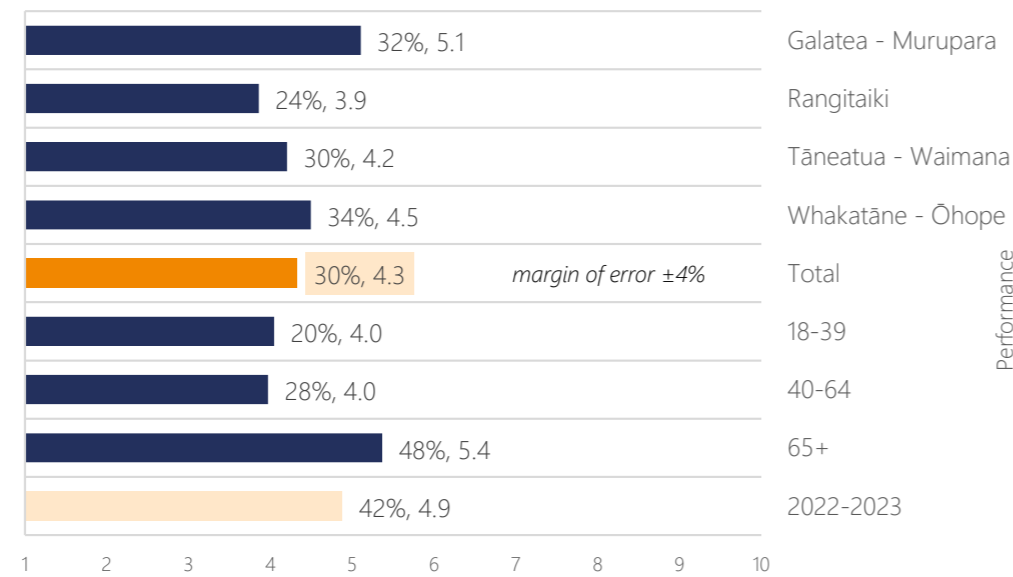
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

COMMUNICATION

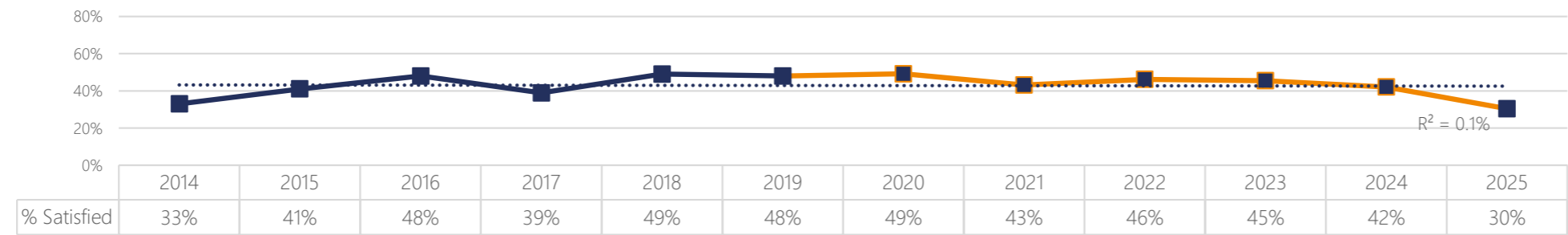
Overall satisfaction with performance in communicating with residents and ratepayers

LTP MEASURE

Overall satisfaction by area and age  
(% satisfied and average score)



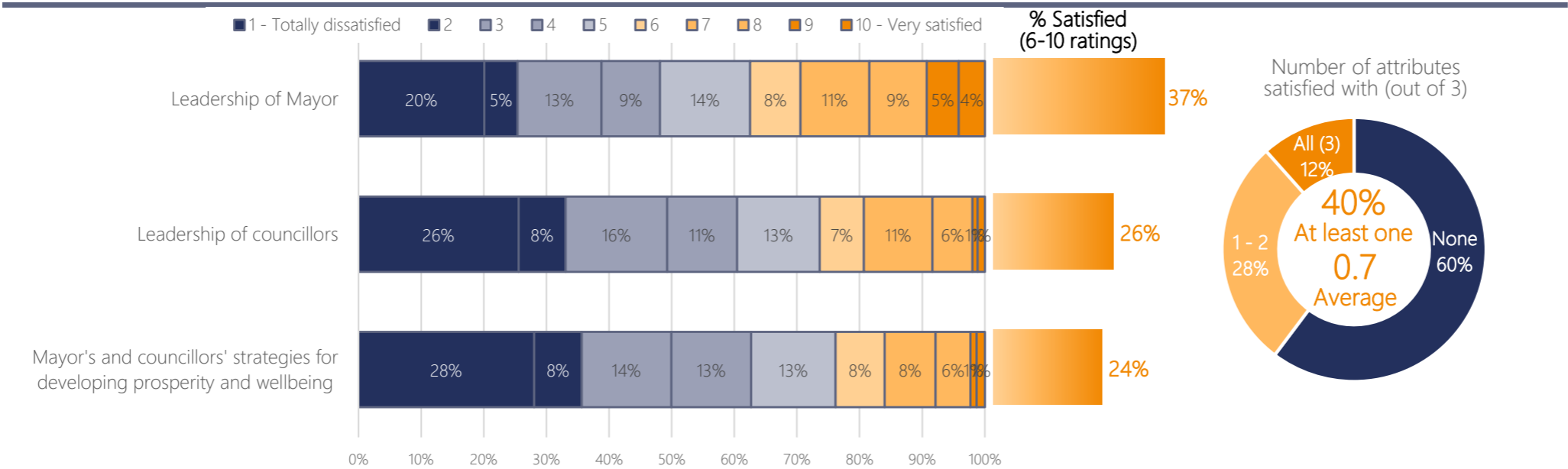
- Overall in 2025, just 1-in-3 (30%) of residents were satisfied with Council's performance in communicating and consulting with the public – significantly below previous years (including 42% in 2024). Noted differences based on both age and area remained in 2025.
- Four statements relating to communication contributed significantly towards overall satisfaction.
- 'Providing sufficient opportunities for people to have their say' and 'Listening to and acting on the needs of the people' (due to relatively low performance despite high relative importance) remain key factors to focus on improving to enhance resident sentiment and increase performance ratings.



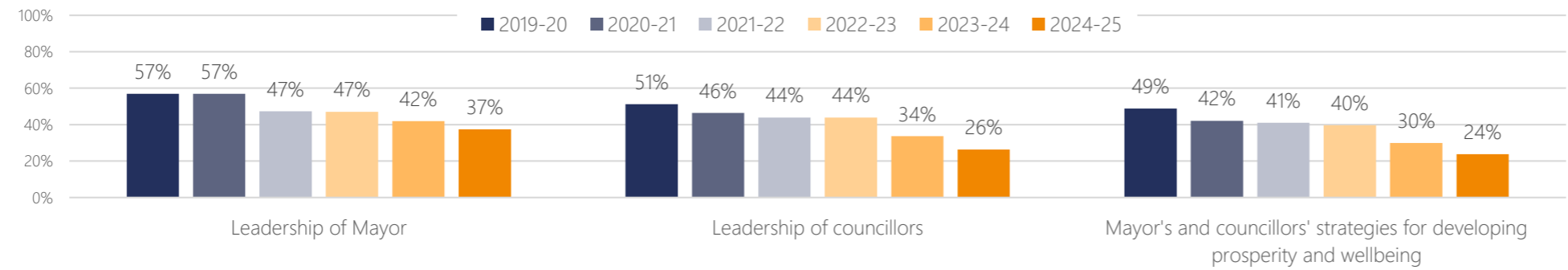
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

COUNCIL LEADERSHIP

Performance in terms of Council leadership



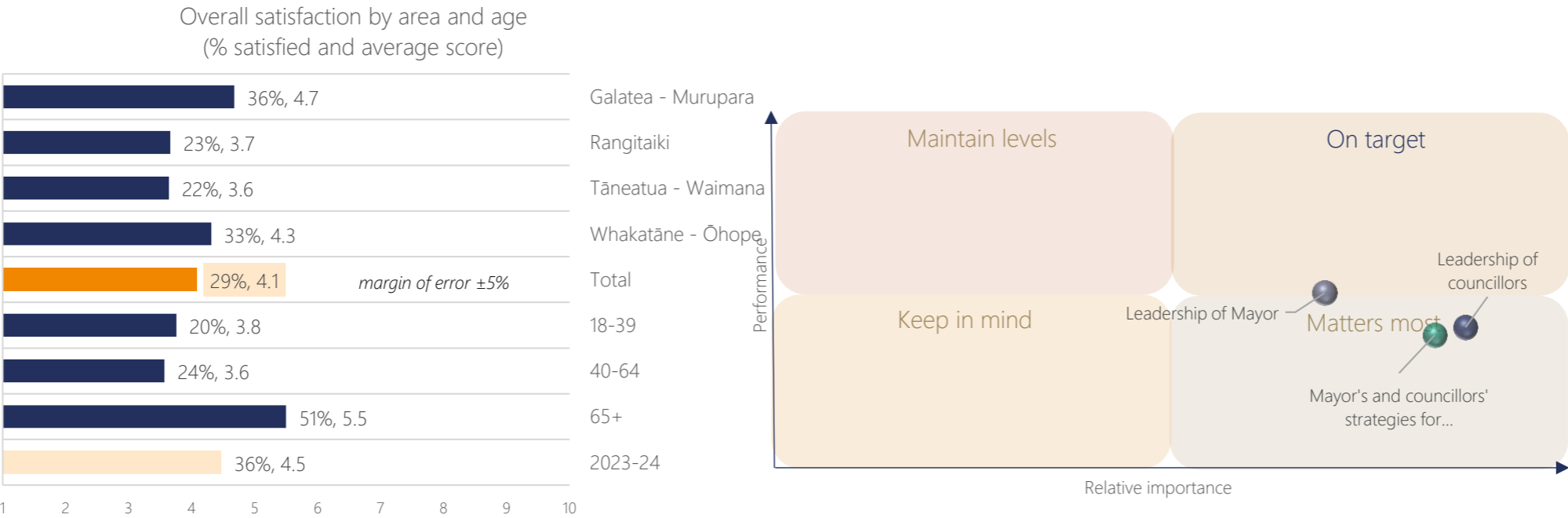
- In 2025, residents also had very low satisfaction with Council leadership attributes, with declines again measured since 2024. Overall, just 2-in-5 (40%) agreed with at least one of the three statements (39% in 2024), while just 12% agreed with all three (14% in 2024, but down from 20% in 2023 and earlier).
- All three attributes have seen satisfaction decline since 2023-24.
- Satisfaction with Council leadership typically remained lower among younger residents (aged under 65 years), and residents outside Whakatāne-Ōhope.
- Satisfaction with leadership of the mayor remained lower in Galatea-Murupara and Tāneatua-Waimana, on average.



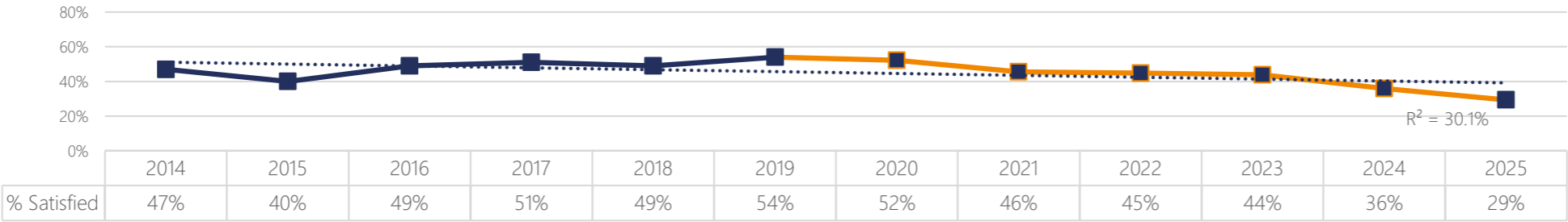
7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

COUNCIL LEADERSHIP

Overall satisfaction with Council leadership



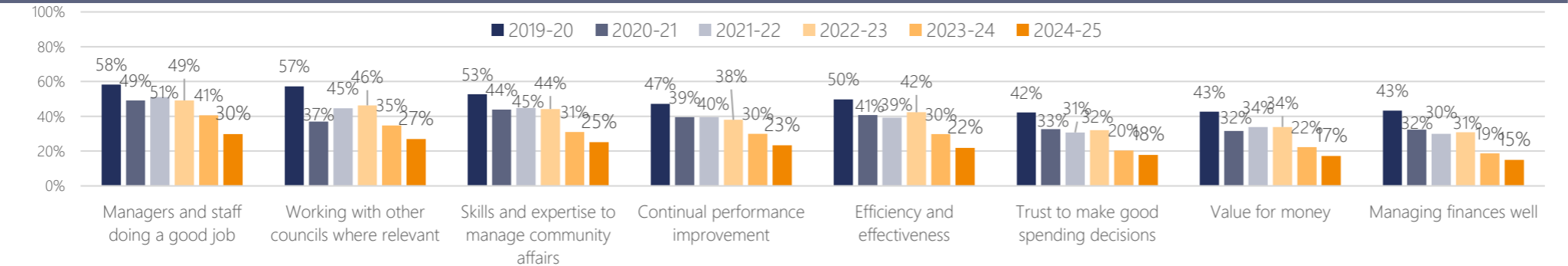
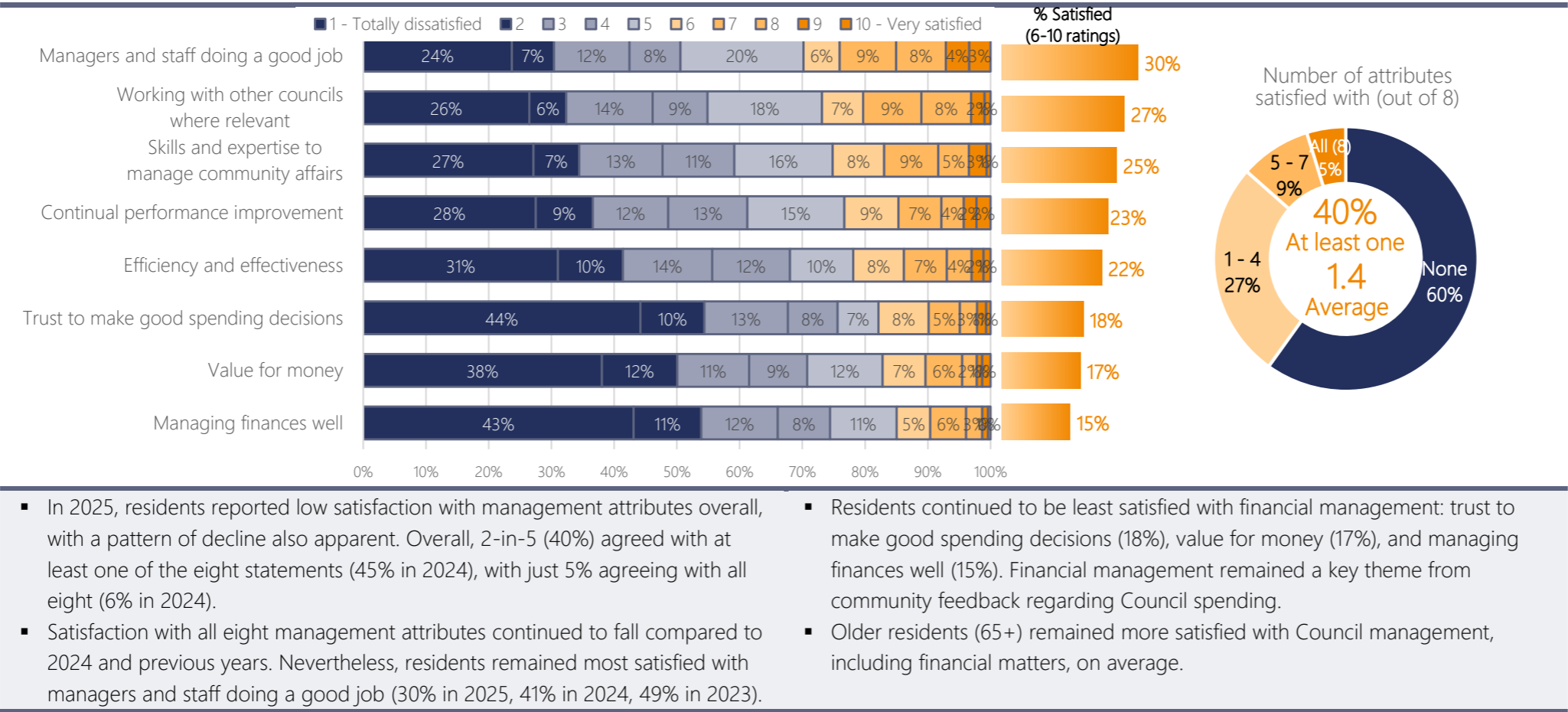
- In 2024, 1-in-3 (29%) of residents were satisfied with the overall performance of Council leadership (down from 36% in 2024, 44% in 2023 and previous years).
- Older residents aged 65+ remained significantly more satisfied with Council leadership overall.
- Satisfaction was low across wards, with less distinct differences between these.
- All three leadership-related attributes contributed significantly towards overall satisfaction. Given the continuing challenges of the current economic climate, 'Mayor's and councillors' strategies for developing prosperity and wellbeing' remains of high importance; with further leadership from councillors also critical to enhance resident sentiments of civic leadership generally.



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

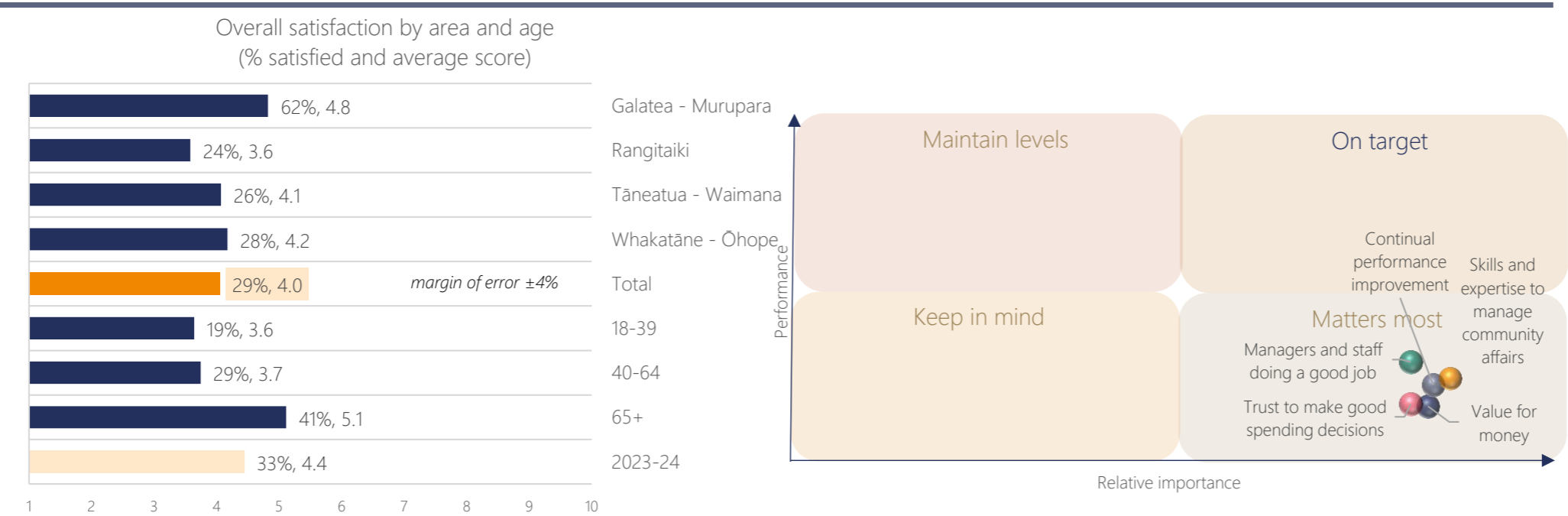
MANAGEMENT

Managing day-to-day business

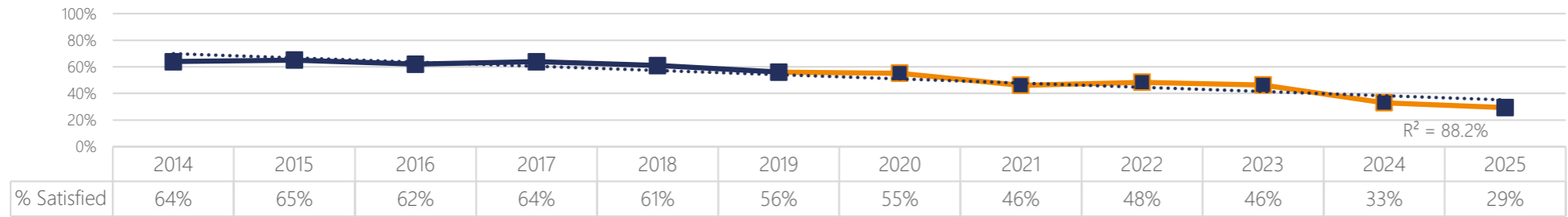


MANAGEMENT

Overall satisfaction with performance in managing day-to-day business



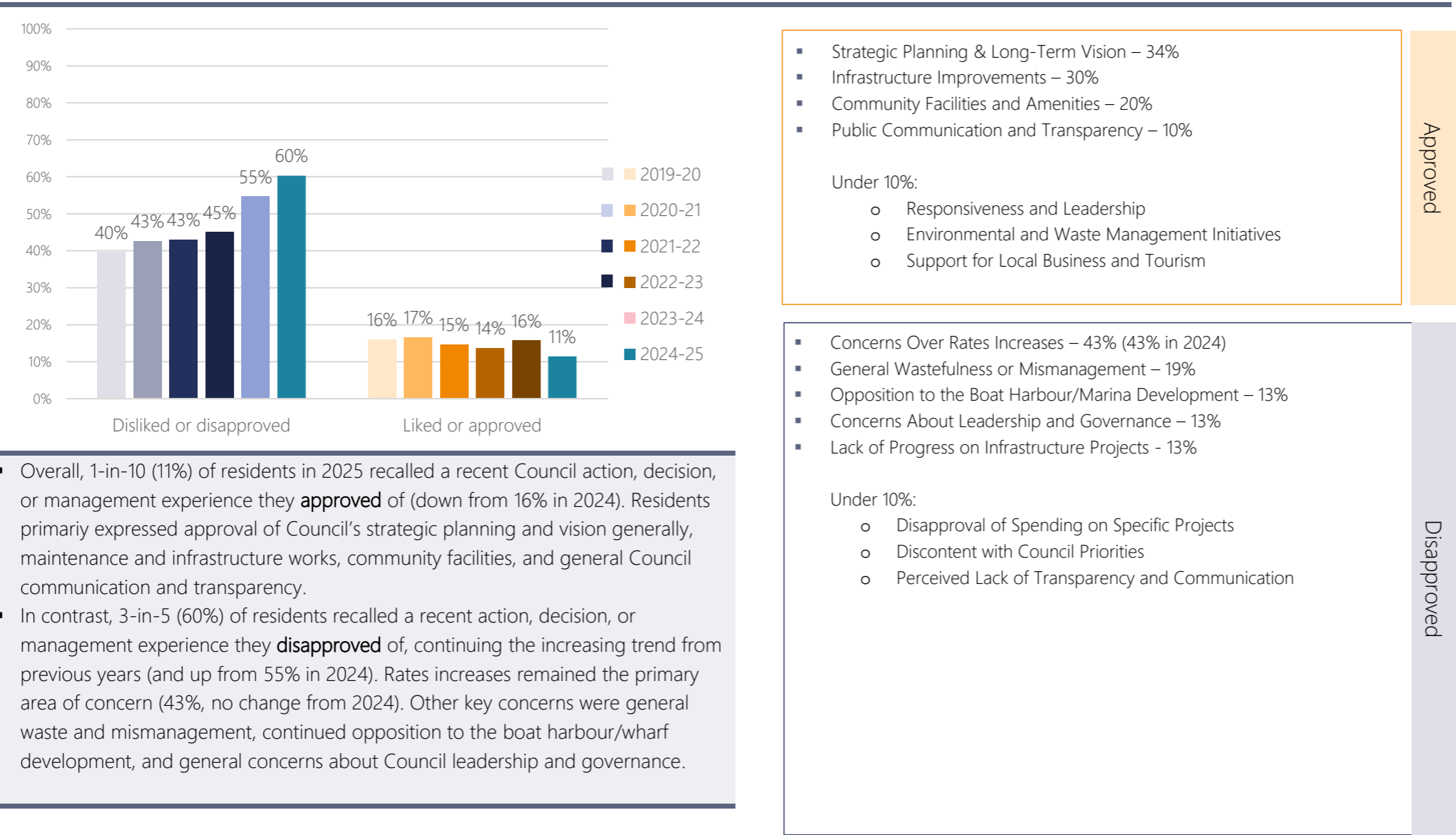
- 1-in-3 (29%) of residents in 2025 were satisfied with Council’s overall management of day-to-day business; slightly down from 2024 (33%) but significantly below 2023 and previous years .
- Older residents (aged 65+) remained most satisfied with Council management overall (41%), though still low and down from 2024 (50%) and 2023 (65%).
- Five attributes significantly contributed towards overall satisfaction with Council performance in managing day-to-day business. In light of continuing resident concerns about Council spending, value for money and trust in spending decisions remain the most critical opportunities for improving perceptions of management generally.



7.1.1 Appendix 1 – 2024-25 Whakatāne DC Resident Survey Report(Cont.)

POLICY AND DIRECTION

Council policy and direction approval or disapproval



**7.2 Health, Safety and Wellbeing Report****7.2 Health, Safety and Wellbeing Report**To: **Finance and Performance Committee**Date: **Thursday, 28 August 2025**Author: **D De Klerk / Manager Health Safety & Wellbeing**Authoriser: **E Hatch / General Manager People and Partnerships**Reference: **A2938907****1. Reason for the report - *Te Take mō tēnei rīpoata***

This report gives metrics, analysis and commentary on the organisation's Health, Safety and Wellbeing activities for the period 1 April to 30 June 2025 with the purpose of providing this committee with assurances around Council's Health, Safety and Wellbeing performance and progress updates towards delivering the Health, Safety and Wellbeing strategy.

**2. Recommendation - *Tohutohu akiaki***

THAT the Finance and Performance Committee **receive** the Health, Safety and Wellbeing report.

**3. Background - *He tirohanga whakamuri***

A Health, Safety & Wellbeing (HSW) Strategy for Whakatane District Council was adopted by the Executive Leadership Team in December 2024. The Whakaora project, to implement the Strategy, was launched to the organisation in April 2025.

The top three priorities within the HSW Strategy have been the focus for the Whakaora project team, being: -

- Priority 1: Developing our Leaders (previously known as Governance, HSW Roles and Responsibilities).
- Priority 2: Hazard and Risk Management, including critical risks.
- Priority 3: Contractor Management

The remaining HSW strategic priorities will be addressed as the Whakaora project progresses, with relevant enhancements (currently shown as 'WIP') to report information and performance metrics.

**4. Discussion – Kōrerorero****4.1. Key Points**

- The Health, Safety and Wellbeing (HSW) Team is now fully resourced.
- The Whakaora project has continued to focus on the top three priorities of Developing our Leaders (previously known as Governance/Roles and Responsibilities), Risk Management and

## Finance and Performance Committee - AGENDA

**7.2 Health, Safety and Wellbeing Report(Cont.)**

Contractor Management. Initial planning for the next two strategic priorities being Information, Training and Supervision and Occurrence Management is due to commence.

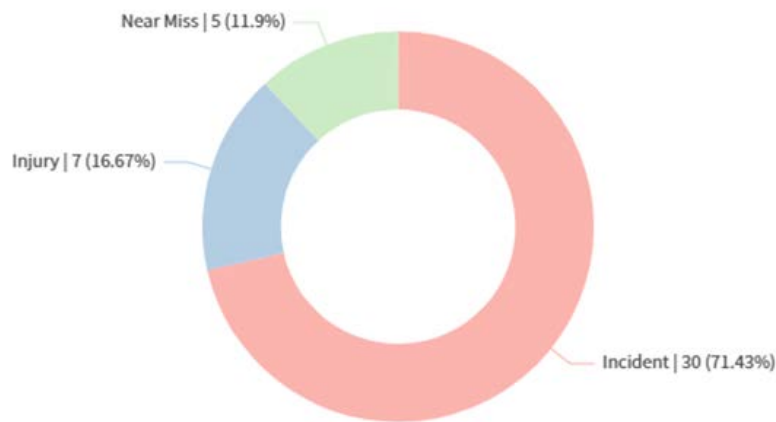
- i. Developing our Leaders - The Governance Charter, being the highest-level stand-alone health and safety document within Council's overall health and safety management system was approved by ELT on 5th August 2025. HSW Committee meetings have been reinstated with a specific focus on roles and responsibilities. The HSW Manager leads these meetings.
  - ii. Risk Management – Council's critical risks have been reviewed and a revised list confirmed by Whakaora project governance. A critical risk framework, outlining the proposed process for managing critical risks has been drafted and is currently being reviewed.
  - iii. Current risk registers (25) have been reviewed by HSW Manager, and a revised risk register template developed. Risk management policy document has been finalised and is expected to be presented to ELT next month for approval.
  - iv. Contractor Management – The contractor management policy has been revised and workshopped with key contract managers. Feedback is being collated, revisions will be made and the policy confirmed by project governance.
- A change management strategy and activity plan has been drafted to standardise and manage the project change impacts for key stakeholders. These documents include the principles and approach for communications, training and support for those impacted.
  - A survey of the various current systems and processes used across Council for risk management has been completed. The various systems and approaches will be analysed, with a council wide approach developed. This information will support the change management activities for the risk management policy roll out.

**4.2. Actions from previous meeting**

Outstanding actions	Notes	Responsible	Date completed
1. Clarification requested for the type of external training completed	Page 23 Q3 HSW Report  'Workers who completed required external training' - clarification on the type of training the 39 workers completed.	Emlyn Hatch	Completed  Email sent 07/08/25
2. Training - Full metric reporting	Breakdown of external training completed by staff, (full metric reporting) requested to be included in future reporting	Emlyn Hatch	Completed  Included in this and future reports

**4.3. Events Reported**

During the quarter, a total of 42 events were reported, the analysis by event type is shown in the chart below.

**7.2 Health, Safety and Wellbeing Report(Cont.)****4.3.1. Event details by Event Type****Injuries (7 total)****Staff Injuries (3):**

1. Two incidents involved sprains or strains, including one back strain that required a week off work.
2. One incident was due to a slip/trip/fall.

**Public Injuries (3):**

1. A slip/trip/fall incident at a holiday park resulted in a cut to the knee.
2. At the Aquatic Centre, a visitor sustained a cut to the shin.
3. A member of the public suffered injuries and required hospitalisation after their bicycle wheel became entangled in temporary roadside fencing on a rural road, causing them to fall. This incident was reported a month later. A follow-up meeting was held with the individual to assess their wellbeing and address any required actions.

**Other Incidents and Near Misses**

- **Customer conflicts** across multiple sites.
- **Malfunction or damage** involving mobile plant and equipment.

**4.4. Critical Risks**

Critical risk management deliverables have been progressed by the Whakaora project this quarter. A review of existing critical risks has been completed with the HSW Manager and Whakaora Project governance, with the identification of two new critical risks. A critical risk framework, that outlines the approach for the management of critical risks, has been drafted and is currently being reviewed by Whakaora Project governance. It is expected that these documents will be presented to ELT for approval in August.

The following table indicates the critical risk information expected to be included in the next quarterly report.

**7.2 Health, Safety and Wellbeing Report(Cont.)**

<b>Critical Risks - Hazard &amp; Risk Management</b>	
<b>Risks</b>	<b>Metrics</b>
New Critical Risk	
Critical Risk Safety Observations conducted as per schedule	
Number of existing Hazards/Risks reviewed / updated	
Percentage of events related to Critical Risk	
Number of events related to a Critical Risk	
% of critical risk events investigated	
# of corrective actions not implemented	

**4.5. Training**

Training is determined based on an employee's role and their tasks. Each role has been assessed and a list of training identified so we can ensure the appropriate training is provided or refresher training.

HSW Induction for New Starters, 100% completed.

External training was conducted for 48 staff during the quarter as follows: -

<b>Course Name</b>	<b>Attendees (48)</b>	<b>Departments</b>
<b>April 2025</b>		
Aquatics First Aid Full	3 Staff	Aquatics
Aquatics First Aid Refresher	1 Staff	Aquatics
Traffic Management Operative NP + P	1 Staff	Reticulation
Workplace First Aid Training	2 Staff	Murupara Service Centre
<b>May 2025</b>		
Growsafe Standard training	1 Staff	Reticulation
Aquatics First Aid Refresher	6 Staff	Aquatics
Situational Safety	16 Staff	Aquatics
Workplace First Aid training	10 Staff	Various Departments

**7.2 Health, Safety and Wellbeing Report(Cont.)**

Aquatics First Aid Full	3 Staff	Aquatics
<b>June 2025</b>		
Aquatics First Aid Full	1 Staff	Aquatics
Traffic Management Worker	1 Staff	Reticulation
Site Safe passport	1 Staff	Building
Aquatics First Aid Refresher	2 Staff	Aquatics

**4.6. Assurance and Verification**

Currently inspections are occurring, however on multiple systems and using multiple processes. Assurance and Verification process review is within scope of the Whakaora project. Once completed, and a standardised process implemented, reporting information will be included within this report.

**4.7. Random Drug Testing**

Monthly random drug testing of staff in sensitive roles, in accordance with our policy, was completed as shown in the table below. **ALL results were negative.**

Random Drug Testing			
Department	April 2025	May 2025	June 2025
Aquatics	•	•	•
Open Spaces	•		•
Whakatane Holiday Park	•		
Solid Waste		•	
Reticulation/Water Treatment	•		•
Transport			•
Animal Control		•	

**7.2 Health, Safety and Wellbeing Report(Cont.)****4.8. Worker Participation and Engagement**

<b>Relationships - Worker Participation &amp; Engagement</b>	
<b>Activities</b>	<b>Comments</b>
HSW Representative Committee meeting held as planned	Meeting held 26 June, led by HSW Manager. Next meeting scheduled for August 19 <sup>h</sup> 2025.
Representation % of required HSW reps	100%
HSW Representatives trained	100%

**4.9. Wellbeing Quarterly Update**

- Number of Staff accessing employee assistance programme - 26 Staff.
- Flu Vax clinic held in May, with 56 staff attending this clinic.
- Wellbeing Collective Events:
  - i) May - Pink Shirt Day morning tea

**5. Options Analysis - *Ngā Kōwhiringa***

There are no options as this is an information report.

**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.

**6.2. Engagement and Community Views**

Engagement on this matter is not being undertaken in accordance with Section 6.0 of the Council's Significance and Engagement Policy. This states that the Council will not consult when the matter is not of a nature or significance that requires public engagement (low significance).

**7. Considerations - *Whai Whakaaro*****7.1. Strategic Alignment**

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

**7.2 Health, Safety and Wellbeing Report(Cont.)**

**7.2. Financial/Budget Considerations**

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

**7.3. Climate Change Assessment**

There are no significant or notable impacts associated with the matters of this report.

**7.4. Risks**

There are no significant or notable risks associated with the matters of this report.

**8. Next Steps – E whai ake nei**

The Whakaora project team will continue to progress delivery of the HSW Strategy. Planning the roll out of final deliverables for the first three strategic priorities is well underway and initial approaches to delivering strategic priorities 4 and 5 has commenced.

Further report enhancements will be completed as the project progresses.

**Attached to this Report**

- Appendix A - Summarised Whakaora project update

**7.2.1 Appendix A - Summarised Whakaora project update****7.2.1 Appendix A - Summarised Whakaora project update**

The following table includes a summarised Whakaora project update for the deliverables of the top three strategic priorities.

**Legend for project status indicators:**

On track	At Risk, being managed by project team	Significant risk to completion
----------	--	--------------------------------

On track, At risk, being managed by the project team. Significant risk to completion.

Objective	HSW Strategy Indicators	
<b>Developing our Leaders</b>		
We have strong health and safety governance.	<i>Governance Charter is implemented.</i>  <b>Project Update:</b> Governance charter approved by ELT 5 August. Roll out and implementation planning underway.	On track
	<i>H&amp;S executive reporting is implemented and effective.</i>  <b>Project Update:</b> Examples of other local government 'Officer' related reporting have been collated. An ELT HSW Report template will be developed from this information, to be enhanced over time as the project progresses.	At Risk
Everyone at Council understand their H&S role specific responsibilities.	<i>100% of job descriptions include H&amp;S responsibilities.</i>  <b>Project Update:</b> Generic wording for HSW related content within job descriptions has been drafted. Implementation planning underway.	At Risk
WDC leaders have strong health and safety capability	<i>100% of people leaders have completed role-specific H&amp;S training.</i>  <i>85% of WDC employees report that their leader is committed to health and safety.</i>  <b>Project Update:</b> Training programme for implementation of project deliverables is included within the drafted change management strategy. Change Management Activity plans for each tranche of change are in development. In house training has been confirmed as preferred delivery option.	On track

**7.2.1 Appendix A - Summarised Whakaora project update(Cont.)**

<b>Risk Management</b>		
We have a critical risk framework and understand our critical risks.	<p>All critical risks have been identified, assessed and a gap analysis completed.</p> <p><b>Project Update:</b> Revised list of critical risks and critical risk framework/approach to manage completing reviews, expect to be presented to ELT in August.</p>	
	<p>Critical Risk register is up to date, effective and controls are implemented and effective.</p> <p><b>Project Update:</b> Current HSW system does not support critical risk management; Critical Risk register and related documented to be developed outside of this system.</p> <p>Activity Risk Registers are up to date, effective and controls are implemented and effective.</p> <p><b>Project Update:</b> Activity risk registers (25) are under review by HSW Team, new risk register template finalised, and old registers reviewed and translated into new format.</p>	
All WDC employees have completed risk management training.	<p>100% off all employees have completed risk management training.</p> <p><b>Project Update:</b> Change management strategy and activity plans have been drafted. Key stakeholders identified, training programme to be developed. In house training to be developed and rolled out using a phased approach.</p>	
We have strong inhouse investigation capability.	<p>100% of the health and safety team have completed investigation training and have been assessed as being competent at investigation.</p> <p><b>Project Update:</b> Survey undertaken on current systems and processes used across council for investigations – information currently being analysed.</p>	
	<p>100% of corrective actions identified in investigations are closed out within 30 days.</p>	

**7.2.1 Appendix A - Summarised Whakaora project update(Cont.)**

	<b>Project Update:</b> Corrective actions and investigation information held across multiple systems, without ability to collate accurate information. Requires standardisation of process and information captured.	
<b>Contractor Management</b>		
<b>Project Update:</b> A revised Contractor Management policy has been drafted and workshopped (16 July) with key contract managers. Their feedback has led to revisions, and a final draft of the policy is expected in August. The policy will be the basis for standardising process and procedures for contractor management and when implemented, will include training and support for staff.		
We have a robust contractor management policy and procedure.	100% of our high-risk contractors are pre-qualified.	
	100% of our contractors are inducted.	
	100% of our high-risk contractors have an overlapping duties document in place.	
Our people are competent to engage and manage contractors.	100% of our people who engage or manage contractors have successfully completed contractor management training.	
	100% compliance with contractor monitoring schedule.	
	100% of our high-risk contractors have had a review biannually.	

**7.3 Organisation Performance Report - Quarter 4 2024/25****7.3 Organisation Performance Report - Quarter 4 2024/25**To: **Finance and Performance Committee**Date: **Thursday, 28 August 2025**Author: **H Madden / Strategic Policy Analyst**Authoriser: **L Woolsey / General Manager Strategy & Growth**Reference: **A2941441****1. Reason for the report - Te Take mō tēnei rīpoata**

The purpose of this report is to provide the Finance and Performance Committee the Organisation Performance Report for Quarter 4 of the 2024/25 financial year (1 April – 30 June 2025).

**2. Recommendation - *Tohutohu akiaki***

THAT the Finance and Performance Committee **receive** the Organisation Performance Quarter 4 2024/25 Report.

**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. It 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 themes for the performance indicators in the Organisational Performance Report (refer Appendix 1) 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.
- Business Plan: The report also provides an update on the business plan 2024-25 which supports the implementation of our annual work programme, providing greater visibility and accountability for the projects Council is working on for a one-year period.

This is the fourth report of the financial year 2024- 2025.

**7.3 Organisation Performance Report - Quarter 4 2024/25(Cont.)****4. Discussion – Kōrerorero**

The report itself is a high-level overview of Council's performance. Across all performance measures Council is tracking in line with previous results.

- **Service Performance:** The residents survey overall satisfaction has slightly increased from the last quarter. The requests for service were higher this quarter across all the top 8 categories.
- **Financial Performance:** The operating expenditure and fees and charges revenue align with budget overall at the close of Q4. Capital expenditure remains behind budget.
- **Organisational Preparedness:** The Emergency Operations Centre (EOC) staff availability has slightly increased from the last quarter with 96 staff on the roster. Cyber security training remains the same this quarter with 53% completing the training modules.
- **Organisational Health:** Staff turnover is low, with only 3.3% exiting the organisation in Q4. Employee assistance has continued to be utilised over Q4. Lifting staff's cultural capability remains a priority, with Toi Kōtuia focused on forward planning and delivering courses.
- **Business Plan:** Performance is tracking well with only 6% of items behind schedule.

**5. Options Analysis - Ngā Kōwhiringa**

There are no options as this is an information report.

**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.

**6.2. Engagement and Community Views**

Engagement on this matter is not being undertaken in accordance with Section 6.0 of the Council's Significance and Engagement Policy. This states that the Council will not consult when the matter is not of a nature or significance that requires public engagement (low significance).

**7. Considerations - Whai Whakaaro****7.1. Strategic Alignment**

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

**7.2. Legal**

The Local Government Act 2002 (LGA 2002) requires Council to demonstrate they are accountable to their communities. Council quarterly reporting, in relation to the LGA 2002, serves as a key process for ensuring transparency, accountability and ongoing performance monitoring.

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25**

**7.3. Financial/Budget Considerations**

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

**7.4. Climate Change Assessment**

There are no significant or notable impacts associated with the matters of this report.

**7.5. Risks**

There are no significant or notable risks associated with the matters of this report.

**Attached to this Report:**

- Appendix 1 – Organisation Performance Measures Quarter 4 2024/25.

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25**

7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)

Whakatāne District Council

# ORGANISATION PERFORMANCE REPORT Q4


Q4 2024/2025

1 April – 30 June

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

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**WHAKATĀNE**  
District Council  
*Kia Whakatāne au i ahau*

WHAKATĀNE DISTRICT COUNCIL ORGANISATION PERFORMANCE REPORT Q4

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7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)

*Purpose of this Report*

Te take o tēnei pūrongo

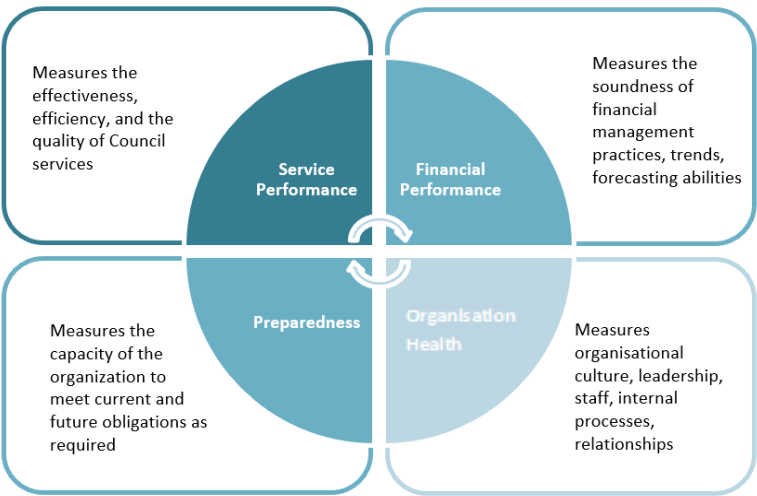
This Organisation Performance Report is a quarterly report presented to Council and covers quarter 4 of the 2024/25 financial year: 1<sup>st</sup> April – 30<sup>th</sup> June.

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 Quarter 4 2024/25(Cont.)**

## Quarterly Summary

### Organisation Health

The Cultural and Leadership People Survey provides a gauge on how staff feel about working at WDC. At 69%, the result for cultural related questions in Q4 is a slight increase from the Q3 result of 68% and is sitting just below the local government benchmark. Q4 has seen another high number of staff accessing employee assistance programmes. Turnover remains steady with a rolling 12-month percentage of 11.9%, below the target of 14%.

### Service Performance

Satisfaction with Council services for this quarter is sitting just below the national benchmark at 49%. Of the requests for service (RFS) received in the fourth quarter, 94% were completed and 5% scheduled. The RFS categories remained largely the same as the previous quarter.

### Financial Performance

Overall operating expenditure largely aligns with budget for the 2025 financial year and capital expenditure is behind budget. Land rate debt is \$8.71M at end of Q4 with 96.7% of invoiced rates collected.

### Preparedness Performance

The minimum requirement for a full Emergency Operations Centre (EOC) roster is 90 staff. There are 96 staff available to roster in the WDC EOC, of which 71 were fully trained for their respective position. 53% of staff completed their cyber security training, this is a significant improvement (7%) from previous quarters.

### 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 2024-25 financial year. There are a total of 279 items listed in the Business Plan for the 2024-25 year; of these 81% of items are on track or completed as at Q4.

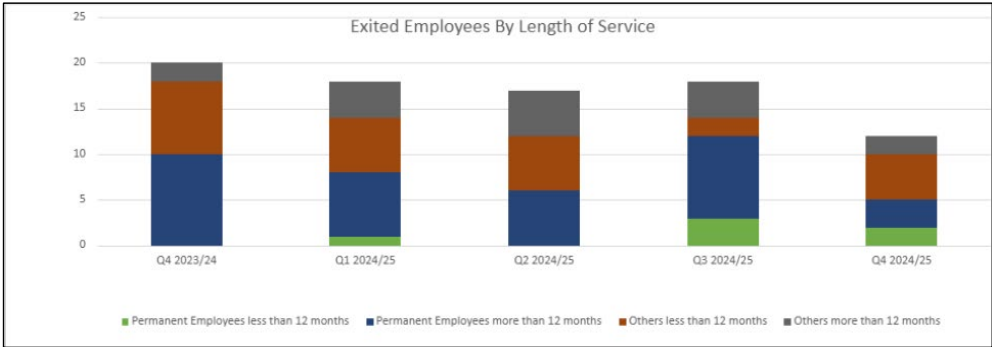
7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)

Organisation Health Measures

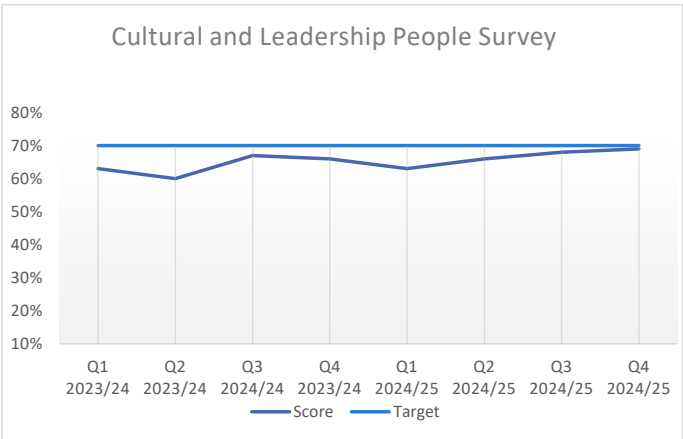
Ngā inenga hauora o te tōpūtanga

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

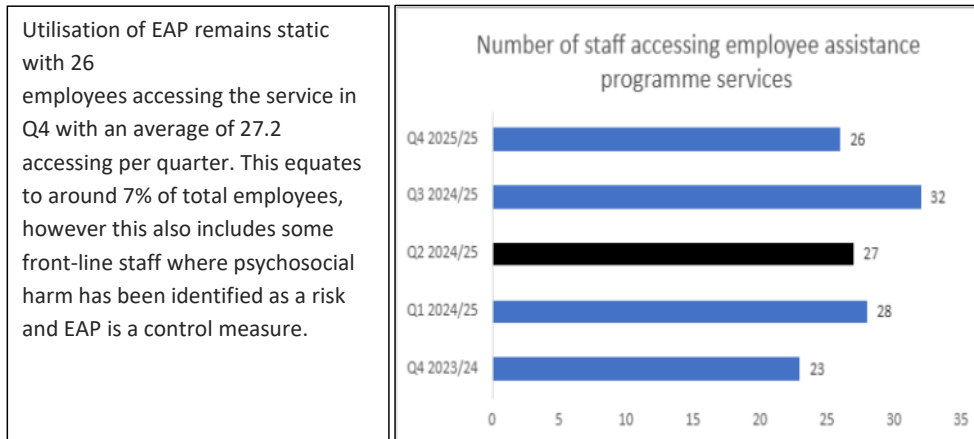
365 employees	+2.0% vs previous quarter +8.0% vs previous year	265 full time permanent staff	+1.9% vs previous quarter +3.9% vs previous year
During Quarter 4, 12 employees (3.3%) exited the organisation. 5 of these were permanent employees and the remaining 7 were fixed term and casual. Our rolling 12-month turnover of voluntary exits of permanent employees is 11.9% which remains below our target of 14%.			



The overall quarterly survey score remains positive with a satisfaction score of **69%**, against a target of **70%**. The participation rate has increased to a 66% response rate. The survey results reveal a generally positive perception among participants regarding work environment and leadership however there are opportunities for improvement in performance management and team collaboration. There is an initiative underway to assist people leaders with managing poor performance.



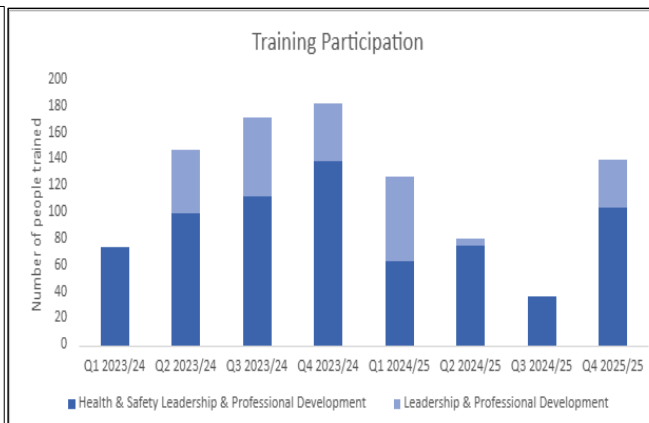
## Finance and Performance Committee - AGENDA

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)****Health and Safety**

**37** Health and safety incidents    **5** Near misses    **3** Injuries    **29** Incidents

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

A number of health and safety specific training sessions were conducted in this quarter including First Aid Training and Refresher First Aid for both general and Aquatics, Traffic Management, Growsafe, Site Safe Passport and Situational Safety. Two Leadership Development courses commenced in May – Leading our People and Growing Greatness.



**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)****Organisational Cultural Competency Training****Noho Marae**

In May 2025, a group of approximately 30 staff had the privilege of staying at Ruaihona Marae, located in Te Teko. This visit was a deeply enriching experience, made possible through the generous hospitality of Ngāi Tamaoki and Ngāti Awa.

**2025 Te Kahupapa Programme Calendar**

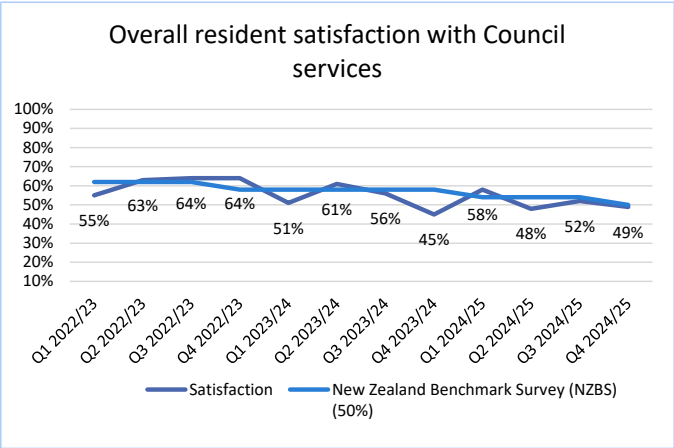
<b>FEB</b> Waitangi Day Kaimahi Quiz	<b>MAR</b> Matatini	<b>APR</b> Kiingitanga Training Iwi Engagement Training
<b>MAY</b> Noho Marae Te Puāwaitanga o Te Reo – Te Reo me ōna tikanga	<b>JUN</b> Matariki Te Puāwaitanga o Te Reo – Te Reo me ōna tikanga E tū nei au – TRONA	<b>JUL</b> Te Tiriti Training
<b>AUG</b> Cultural Hīkoi	<b>SEP</b> Te Wiki o Te Reo Māori Mahuru Māori	<b>OCT</b> Te Puāwaitanga o Te Reo – Te Reo me ōna tikanga Rā Maumahara
<b>NOV</b> Noho Marae	<b>DEC</b> TBC Councillors Haerenga	

7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)

## Service Performance Measures

### Ngā inenga ratonga Kaunihera

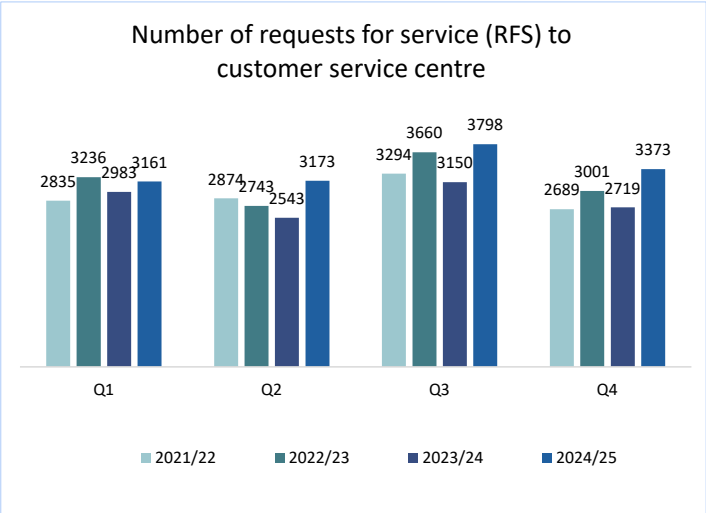
The following indicators have been identified to measure the effectiveness, efficiency, and the quality of Council services.

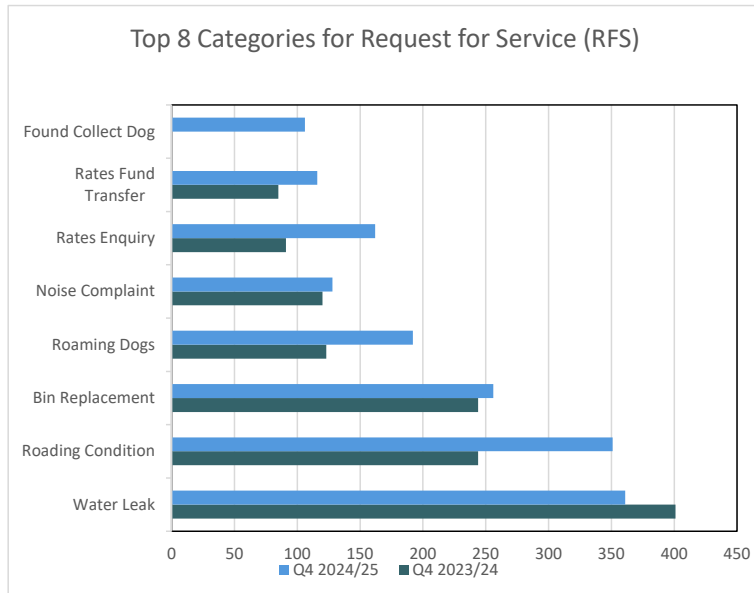


This quarter, we received an overall resident satisfaction result of 49%, a slight decrease from our Q3 result of 52%.

Target: Equal or above the NZ benchmark (50%).

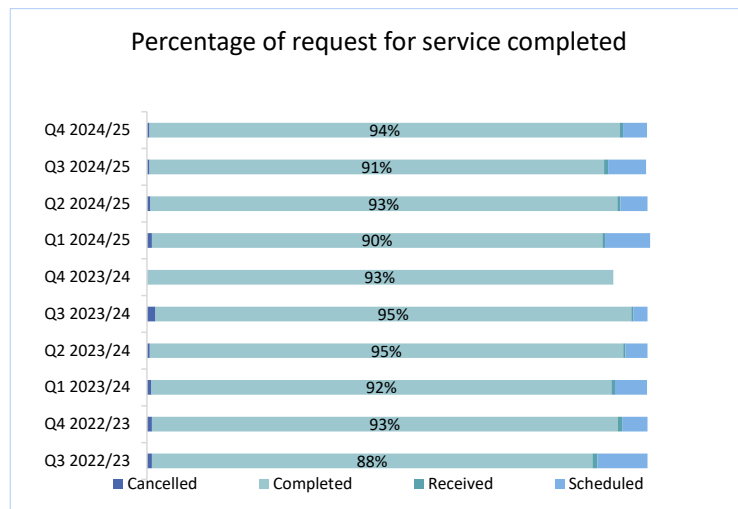
There is a large increase of 654 more RFS' logged into Ozone as the same period last year. This could be a result of the increase in phone calls this quarter. In addition to that, the RFS reporting structure was changed (starting 1<sup>st</sup> July 2024) to accommodate the request from Audit NZ to log duplicate phone calls for the same issue. This has mainly affected the Water and Roding RFS types, with multiple calls regarding the same water leak now being duplicated in Ozone. All calls regarding planned and emergency water shutdowns are now logged as a Request for Service, rather than treating these queries as a request for information.



**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)**

Rates enquiries increased due to the Rates team requesting a change of process for monitoring callback enquiries.

Animal Control Found/Collect Dog RFS' have increased. This could be due to the increase of abandoned litters of puppies over this period, along with an increase of communications from Council encouraging the public to report animal control issues directly to the Council.



There were 7814 calls received by Customer Services this quarter. Of these **91.80%** of calls were answered within 30 seconds.

Target: **85%**

Of the 3,373 RFS that were received this quarter, **94%** of these have been completed. Some RFS are sent to a third-party contractor for action and therefore have been 'completed' within our systems.

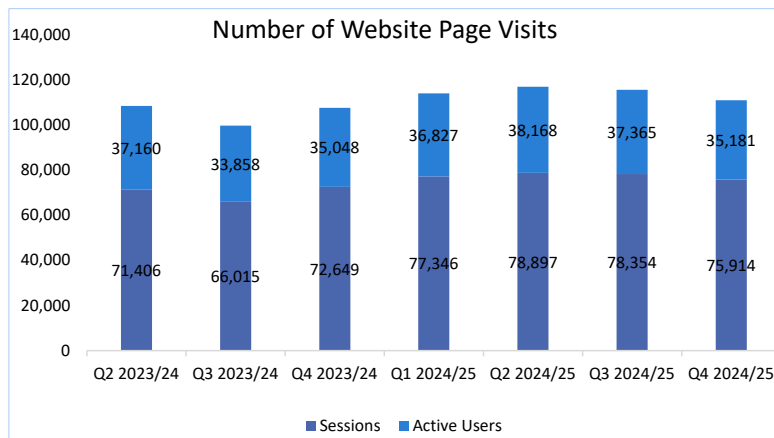
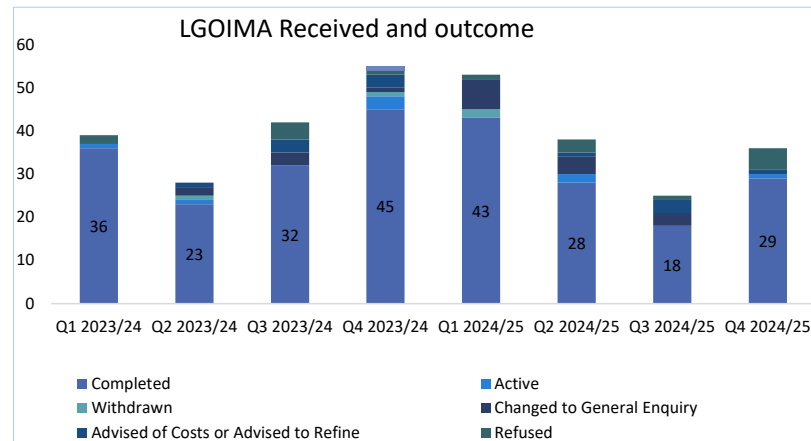
Target: **90%** completed and scheduled.

## Finance and Performance Committee - AGENDA

## 7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)

**100%** of requests under the Local Government Official Information and Meetings Act (LGOIMA) were processed within 20 days (statutory timeframe).

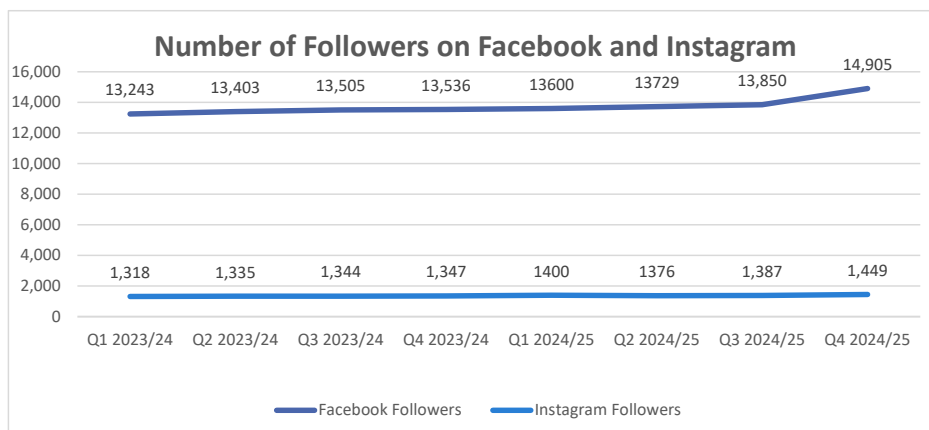
Target: **100%**



Reporting remains as New Zealand website traffic only.

**Sessions:** A period 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.



**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)****Campaigns**

Airport land leases	Murupara Hub branding and collateral
Airport SOI	Murupara newsletter
Airport Solar Farm	Murupara Wastewater
Annual Plan	Murupara stormwater blow-out
Annual Plan educational campaign	New variable school speed limits
Annual report summary	Ocean Playground resurfacing project
Anzac program	Open Spaces Strategy
Aquatic Centre shut down	Plan change 4 (building level) consultation
Aquatics signage update	Plan change 5 (accessible parking)
Arts Hub, 266 The Strand	Plan Change 8 – Making Room to Grow
Awakeri Structure Plan	Planned water shut downs
Battery recycling campaign + battery take back campaigns	Pohutukawa tree removal
Canva templates and brand guidelines setup for comms + event advisors	Pre-Election report
Career expo collateral	Procurement Policy consultation
Climate Change Community Fund	Project Futureproof
Climate Change Risk Assessment	Property Disposal consultation
Climate change workshops	Rangitāiki cycleway
Food safety courses	Rates rebate campaign
Summer roading projects	Bird scaring devices
Keepa Rd shared use path upgrades	Food levy fees update
Community Grants – Reorua and Te Pūaha	Removing hairdressing standards
Emergency Management branding (vehicle, signage, socials, etc.)	Road Safety campaigns
Cultural signage	Rūātōki boil water notices
Dangerous and Insanitary Buildings consultation	Rugby Park lighting project
District Plan review	Spatial Plan
Dog registration campaign and social media video	Te Kōputu and Murupara Service Centre photography sessions
Election campaign: branding + collateral	Te Kōputu events promo
Electronic parking monitoring	Te Kōputu signage update 2025
Emergency management digital campaign	Te Kōputu website
Flood Modelling	Three Strikes campaign
Goulstone Road crossing	Three Waters Consent Replacement Programme
Herepuru retaining wall	Thornton Hall Road proposed renaming
Hinemoa stormwater pump station works	Toi Kōtūia logo
Holiday closure socials	Tourism Bay of Plenty funding
Japanese garden signage	WDC screen saver refresh
Light Up festival	Whakaora – health, safety and wellbeing project
Lisa Carrington sign	Wharfside
Local Growth Strategy	Working from home survey
Local road speed consultation	Youth council collateral and apparel
Local water done well consultation	Youth Development Fund
Management challenge introduction video support	
Maraetōtara flying fox opening	
Matatā + Edgecumbe CERT	
Matata Wastewater	
Mimiha Bridge	
Multiple weather events	

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(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**

2024/25 YTD	ACTUAL	BUDGET	VARIANCE %	Target
	\$87.02M	\$89.29M	2.5%	At or within 5% of budget

**Capital Expenditure**

2024/25 YTD	ACTUAL	BUDGET	VARIANCE %	Target
	\$48.43M	\$66.68M	27.4%	At or within 5% of budget

**Fees and charges revenue**

2024/25 YTD	ACTUAL	BUDGET	VARIANCE %	Target
	\$9.31M	\$9.59M	-2.9%	At or within 5% of budget

**Other Revenue**

2024/25 YTD	ACTUAL	BUDGET	VARIANCE %	Target
	\$98.45M	\$98.78M	-0.3%	At or within 5% of budget

**Debt as a proportion of LTP forecast**

ACTUAL	FORECAST	VARIANCE %	Target
\$177.8M	173.8M	2.3%	Within 5% of forecast

**Rates Debtors**

PERCENTAGE COLLECTED	VARIANCE %	Target
96.7%	3.3%	Within 5% of total rates

**Operating Expenditure YTD:** Operating expenditure is within range of budget overall at the close of Q4.

**Capital Expenditure YTD:** Project delivery to the end of June is behind budget.

**Fees and Charges YTD:** Fees and charges are within range of budget overall at the close of Q4.

**Other Revenue YTD:** Other revenue is under budget overall at the end of the financial year, operational subsidies and interest revenue higher than budget is offset by capital subsidies and development contributions less than budget. Capital subsidy variance is related to the timing of projects and the impact of withdrawal of NZTA funding.

**Debt as a proportion of LTP forecast:** Debt of \$177.8M at close of Q4 is \$4m higher than full year budget.

**Rates Debtors as a % of Total Rates:** Land Rate debt is \$8.71M at end of Q4 (this debt relates to prior years as well). % of invoiced rates collected 96.7%.

7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(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.

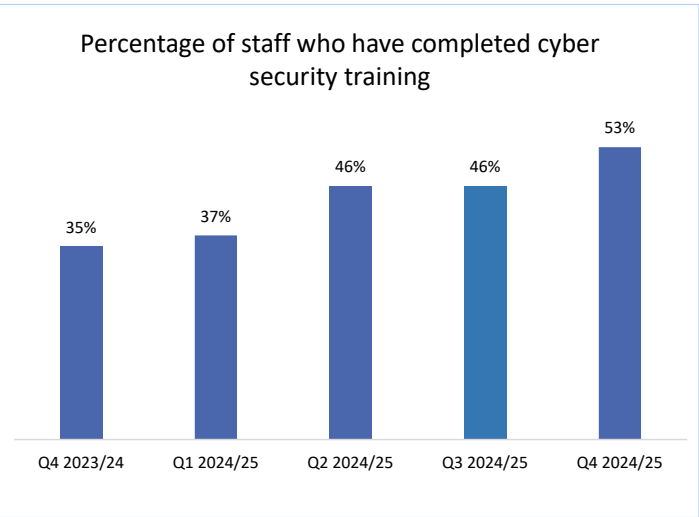
The minimum staffing requirement for a full 24/7 EOC roster is three shifts, with 11 managers and 19 pool staff for each shift. This provides 30 staff per shift with a total of 90 staff needed on the roster. Council currently has 95 staff on the EOC roster as shown in the table below.

Emergency Operations Centre

	Minimum required	Appointed
Managers	33	30 (includes Taupuhipuhi)
Pool Staff	57	66
Total	90	96

Of those, 71 are fully trained for their respective positions, 21 are partially trained, and 4 are yet to start training. Some management staff have an additional requirement to complete function specific training for their role. We now have 3 representatives in our Taupuhipuhi team and Dickie de Klerk as our safety representative.

Cyber Security



In Q4, cybersecurity training had a slight increase (7%) in uptake from Q3. The Digital Services team are working through several initiatives to increase the participation rate.

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)**

## Council Business Plan 2024-25 – Progress Report

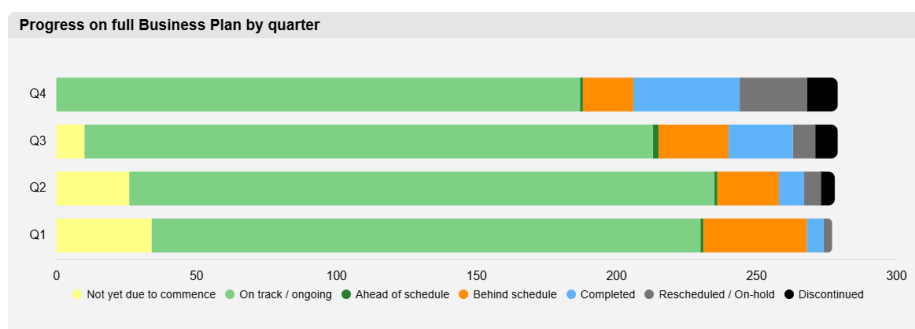
Whakatāne District Council Business Plan 2024-25 – Q4 Report (status of work programme as at 30 June 2025)

The Business Plan supports implementation of our annual work programme, providing greater visibility and accountability for the things Council is working on for a one-year period. Quarterly reporting on the Business Plan keeps us in touch with our intention to 'successfully deliver our intended work programme for the year'.

This quarterly report provides information as at the end of quarter 4 of the 2024-25 year (e.g. as at 30 June 2025) which also marks the end of the Council financial year. Detailed information and insights are provided to the Executive Team for organisation management purposes, with top line results provided to the Finance and Performance Committee through this report.

### Overall progress as at Q4:

- The Business Plan reports against 279 items on Council's work programme.
- 81% of items are on track or completed as at Q4.
- This is in keeping with Q4 results from previous years - 83% as at Q4 2024, and 79% as at Q4 2023.
- The most observable changes in overall results from Q3 to Q4 are an increase in 'completions' and an increase in items that are 'on-hold' or 'discontinued'.
- Overall progress by quarter is as follows - with the most recent quarter at the top:



**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)****New completions during Q4:**

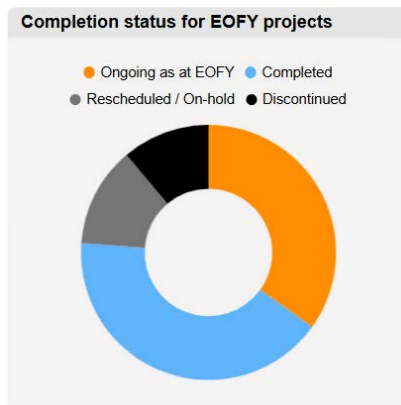
- There were 16 'new completions' during Q4, bringing to a total of 38 completions for the full year. The 16 new completions are as follows:
  - 2.02.02 Investigate phase for relocation of Te Pātaka Kōrero (Heritage Gallery)
  - 6.01.05 Completion of Eastern Bay of Plenty Economic Development Strategy (Toi EDA led)
  - 6.01.10 Reset Te Ara Hou project funding in negotiation with central government
  - 6.02.03 Complete property disposals project stage 1
  - 6.02.04 Finalise plan for commercial management of Council commercial property portfolio
  - 6.02.09 Rephase and deliver Mitchell Park capital improvements project
  - 7.01.08 Enhance resources for community resilience and response (BOF project)
  - 9.01.08 Ōhope wastewater treatment plant desludging project
  - 12.01.06 New playground shade sails and shelters
  - 15.03.03 Develop Eastern Bay of Plenty Spatial Plan
  - 17.04.02 Review compliance framework and approach
  - 19.01.06 Undertake feasibility study for hangar development
  - 20.10.07 Complete business case and implementation plan for ERP replacement project
  - 20.11.04 Implement changes to centralise council procurement systems and processes
  - 20.12.06 Complete development of Annual Plan 2025-26
  - 20.12.08 Complete fees and charges schedule review (annually alongside annual plan)

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)****Work programme items discontinued:**

- By the end of Q4 a further 3 items have been discontinued, bringing to a total of 11 'discontinued' items for the full year. A summary of these items follows:
  - As reported earlier in the year, a number of transport related projects have been discontinued due to reductions and changes in funding from Waka Kotahi/NZTA.
  - As reported earlier in the year, some finance and commercial services continuous improvement projects have been discontinued to enable rescoping following changes in senior management.
  - In Q4 the boat harbour workstreams, and Keepa Road upgrade have been discontinued following the decision to cancel the Te Rāhui Herenga Waka Whakatāne Boat Harbour project.

**Items due for completion by EOFY:**

- The work programme signals intended completion dates for projects. 63 projects were due for completion by end of Q4/end of financial year – or 48 after removing non-active items (those that have been discontinued or are on hold).
- Of the 48 projects due for completion by EOFY, 54% were able to be completed. This leaves 22 items that may need to be continued or carried forward into the new financial year.
- Projects report a range of reasons for needing more time, with some examples listed below:
  - Awaiting dependencies such as investigations or other projects to finish first.
  - Needing to allow more time for iwi or hapū engagement.
  - Being impacted by staff attrition or decisions to postpone new recruitment.
  - Scope changes impacting project.
  - Uncertainty associated with central government policy.
  - Funding not available or cost increases impacting progress.

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)****Progress on high-profile items:**

- 23 items are tagged as 'high profile' for greater council visibility – these are listed below.
- In general, items are tracking well with 7 completed, 15 continuing on track, and one discontinued.
- Items that are 'on track' span multiple financial years and will continue into the next quarter.
- One item is discontinued – relating to the cancellation of the Te Rāhui Herenga Waka Whakatāne Boat Harbour project.
- It is expected that key projects will start to be reported (in more detail) through the ePMO in future.

## Finance and Performance Committee - AGENDA

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)**

Ref #	Primary	PROGRESS STATUS:
1.01.03	Coordinate Local Government elections 2025 process	On track / ongoing
3.01.01	Implement and report on Te Toi Waka Whakareī (Māori Relationships Strategy)	On track / ongoing
6.01.06	Progress application to regional infrastructure fund / Kanoa	Completed
6.01.09	<del>Manage Boat Harbour project workstreams and shareholder reporting to Council</del>	Discontinued
6.01.10	Reset Te Ara Hou project funding in negotiation with central government	Completed
6.01.11	Develop Whakatane District Growth Strategy	On track / ongoing
6.02.04	Finalise plan for commercial management of Council commercial property portfolio	Completed
6.02.06	Integrate BoPRC town centre flood management with urban design master planning	On track / ongoing
9.01.09	Wastewater upgrades - Matata wastewater scheme	On track / ongoing
10.02.01	Navigate and implement response to 'local waters done well' reform	On track / ongoing
15.03.03	Develop Eastern Bay of Plenty Spatial Plan	Completed
15.04.01	Wastewater discharge consent replacements (Equalised schemes)	On track / ongoing
15.04.02	Wastewater discharge consent replacements - Murupara scheme	On track / ongoing
15.04.03	Water Supply consent replacements (Equalised schemes)	On track / ongoing
15.04.04	Water Supply consent - Murupara scheme	On track / ongoing
18.01.03	Rex Morpeth Park recreation hub - finalise Master plan	On track / ongoing
20.02.01	Develop EPMO pathway, project plan, and initial pilot	On track / ongoing
20.09.02	Implement health and safety reset project	On track / ongoing
20.10.07	Project Enterprise ERP replacement - Business case and implementation plan	Completed
20.10.08	Project Enterprise ERP replacement - Project specification design	On track / ongoing
20.10.09	Project Enterprise ERP replacement - Implementation and delivery	On track / ongoing
20.12.04	Corporate planning - Finalise Long Term Plan 2024-34 (within extended timeframe)	Completed
20.12.06	Corporate planning - Develop Annual Plan 2025-26	Completed

**Next steps for the Business Plan:**

- The Executive Leadership Team held a workshop on 13 August 2025 to review Q4 progress.
- Detailed results have been provided to General Managers to support portfolio management.
- The Executive Leadership Team is reviewing the carry-forward work programme and the Business Plan will be updated in keeping with any changes to project scheduling.
- The Business Plan is currently being updated to reflect the work programme for 2025-26 and will be shared with Council when finalised.
- Results from the Business Plan will continue to help support organisation continuous improvement

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)****How our measures are calculated**

**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.

**Overall resident satisfaction with Council services** – Results are 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.

**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.

**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.

**7.3.1 Appendix 1 – Organisation Performance Measures Quarter 4 2024/25(Cont.)**



WHAKATĀNE DISTRICT COUNCIL ORGANISATION PERFORMANCE REPORT Q4

1 APRIL - 30 JUNE 2025

Te Pūrongo Aroturukitanga Mahi a

Te Kaunihera ā-rohe o Whakatāne 4

**7.4 ERP Replacement Project Update(Cont.)****7.4 ERP Replacement Project Update**

To: **Finance and Performance Committee**

Date: **Thursday, 28 August 2025**

Author: **L Stewart / Programme Manager**

Authoriser: **E Hatch / GM People & Partnerships, Executive Sponsor**

**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 update on Council's ERP replacement project.

**2. Recommendation - *Tohutohu akiaki***

1. THAT the Finance and Performance Committee **receive** the 'ERP Replacement Project Update' report; and
2. THAT the Finance and Performance Committee **note** that re-phasing of Long Term Plan 2024-34 approved funding will be addressed through the Annual Plan 2026-27 budget process; and
3. THAT the Finance and Performance Committee **note** that the forecast shortfall in total implementation costs will be addressed through the Annual Plan 2026-27 budget process.

**3. Background - *He tirohanga whakamuri***

On 12 December 2024, Council:

- Approved the ERP Replacement Business Case to replace Ozone as the existing ERP solution;
- Endorsed the commencement of contract negotiations with Datacom Solutions Ltd ('Datacom'), the vendor for the preferred Datascape solution;
- Approved the commencement of the project to implement Datascape;
- Endorsed investment of \$4.25 million of allocated funding in the Long Term Plan 2024-34 to fund project implementation by internal loan to be repaid over 10 years;
- Noted a \$517,000 shortfall in implementation costs to be reviewed during implementation planning, with any remaining shortfall addressed through the Annual Plan 2026-27 process; and
- Agreed updates to Council on the project would be provided via quarterly reporting to the Finance and Performance Committee.

**4. Discussion – *Kōrerorero***

Following Business Case approval in December 2024, the first quarter of 2025 focused on:

- Establishing the ERP Replacement project;

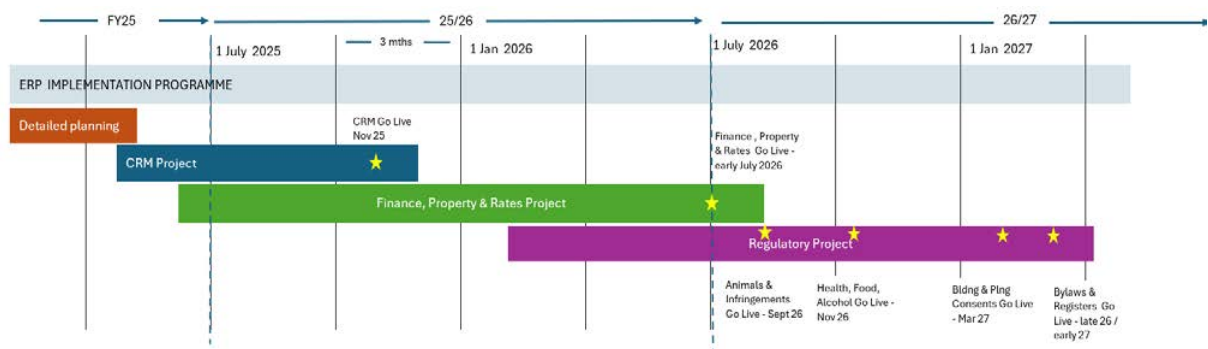
**7.4 ERP Replacement Project Update(Cont.)**

- Appointing and inducting the project team;
- Establishing the project governance structure;
- Contract negotiation with Datacom; and
- Detailed planning with Datacom to refine the staged approach to implementation.

**4.1. Timeline**

The implementation timeline for the ERP Replacement Project – now called ‘Programme Enterprise’ to better reflect the multiple projects to be delivered during the 2-year implementation period – is detailed below.

Figure 1. Implementation timeline



The CRM ('Customer Relationship Management') Project is on track. This project will see implementation of:

- Datascope module for raising and managing Service Requests
- Datascope module for creating and editing Contacts information
- Antenno which will enable service requests to be submitted and send location-specific alerts and notifications to residents via a mobile app
- Enhancements to the current Online Portal for online submission of service requests
- FieldWork – a mobile app which enables staff in the field to receive and complete service requests

It is important to note that the CRM Project will facilitate technical implementation of Antenno and Online Portal changes. Discussion is currently underway with Councils Communication and Engagement Team to recommend an approach to communicating these changes to the community.

**4.2. Progress**

The CRM project is on track for an early November "go live". System design has been signed off and the system is nearing the end of the 'Build' phase. The team is preparing for a multi-layered approach to system testing (September) as well as a comprehensive training approach for impacted teams (October). Change management is progressing well with People Leader and All Staff information sessions as well as targeted stakeholder engagement with impacted teams.

Preparation for the commencement of the Finance, Property and Rates project is underway with design workshops to commence in September.

**7.4 ERP Replacement Project Update(Cont.)**

The Programme Team has established a network of other Datascope Councils to learn from past and current implementation experiences as well as a procuring independent advisory services to provide guidance on specific topics and/or issues.

**4.3. Budget**

Table 1 below provides a summary of implementation costs forecast through the Long Term Plan, Business Case and project planning phases.

	<b>24/25</b>	<b>25/26</b>	<b>26/27</b>	<b>TOTAL</b>	<b>LTP Variance</b>
<b>LTP 24/34 budget</b>	2,370,000	1,880,000	-	4,250,000	
<b>Business case budget</b> (includes contingency)	2,246,316	1,843,988	676,581	4,766,885	-\$516,885
<b>Current forecast</b> (includes contingency)	756,474 (Actuals)	-2,235,888	1,763,927	4,756,289	-\$506,289

The forecasted and estimated \$506,289 shortfall from the LTP24/34 budget will be addressed through the Annual Plan 26/27 budget. This approach was agreed by Council at a meeting of 12 December 2024. At the time of that meeting the estimated shortfall was \$517,000. That figure is now \$506,289, meaning the project has a \$10,596 variance (positive) on where we predicted we would be nine months ago.

As this project is financed through a 10-year internal loan, assuming the funds are drawn in the 2026-27 financial year, the estimated impact on rates for that year is expected to be less than 0.1% and will be confirmed through the Annual Plan 2026-27 budget process.

#### 4.3.1. Key Risks

Name	Description	Residual Likelihood	Residual Consequence	Residual Risk Assessment	Mitigation
Implementation Delays	There is a risk that the large and complex nature of ERP implementations leads to delays in implementation timeline.	2- Unlikely	3- Moderate	Medium	Contingency established and managed with appropriate governance approval. Programme budget reviewed post planning phase with minimal variance. Plan for a phased rollout with contingency plans to maintain essential services. Learnings gathered from established network of Datascape councils. Robust risk management process developed as part of project establishment and endorsed by governance.
Data Migration Issues	There is a risk data cleansing requirements to migrate quality data from Ozone and Datascape lead to delays in the overall implementation timeline.	3- Possible	3- Moderate	Medium	Proactive data quality assessment completed. WDC working closely with Datacom's Ozone and Datascape delivery teams to migrate Contacts data to support CRM implementation. Alignment with draft Data Strategy to lift maturity around data ownership.
Change Management	There is a risk that the multi-year nature of ERP implementations in parallel with concurrent LTP work programme delivery expectations lead to change fatigue amongst staff with potential loss of staff and therefore business continuity/knowledge retention.	3- Possible	3- Moderate	Medium	Backfilled SME resources. Change management workstream to monitor and support business readiness. Strong governance framework and consistent Executive engagement.
Integrations	There is a risk of challenges in integrating Datascape with other existing Council systems which could	2- Unlikely	3- Moderate	Medium	System integrations made clear during procurement process with no significant issues identified.

	result in implementation delays, and reduced benefit realisation in relation to operational inefficiency gains and real-time visibility.				
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5. Options Analysis - *Ngā Kōwhiringa*

There are no options as this is an information report.

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.

6.2. **Engagement and Community Views**

On the basis of a low level of significance, and in line with the Significance and Engagement Policy, Section 6.1, specific engagement on this matter will not be sought based on:

- The matter is not of a nature of significance that requires public engagement (Section 6.1. a); and
- The matter has already been addressed by the Council's policies or plans, which have previously been consulted on (inclusion LTP21/31 and 24/34 (Section 6.1. e).

7. Considerations - *Whai Whakaaro*

7.1. **Strategic Alignment**

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

7.2. **Financial/Budget Considerations**

The LTP 24/34 includes \$4.25 million over two years to fund the ERP Replacement Project via an internal loan. The Business Case approved in December 2024 indicated a \$517,000 shortfall in project costs to be addressed through the Annual Plan 2026-27 process. Current budget forecasting has reduced this shortfall by \$10,000 to \$506,289. As the full implementation costs are funded via an internal loan, this shortfall is not required to be directly funded through 26/27 rates. The anticipated rates impact of the increase in internal loan amount is expected to be less than 0.1% and will be confirmed through the Annual Plan budget process. Re-phasing of the programme costs will also be addressed through the Annual Plan 2026-27 process.

7.3. **Climate Change Assessment**

There are no significant or notable impacts associated with the matters of this report.

7.4. **Risks**

Refer to 'Key Risks' under Section 4. Discussion.

**7.4.1 Appendix A – ERP Replacement Update slide pack**

**8. Next Steps – E whai ake nei**

1. Council will continue to progress 'Programme Enterprise' to implement Datascape to replace Ozone as Council's ERP system.
2. Address rephasing of programme spend through the Annual Plan 2026-27 budget process.
3. Address the shortfall in programme budget through the Annual Plan 2026-27 budget process.
4. Continue to provide progress updates via the Finance and Performance Committee.

**Attached to this Report:**

- Appendix A – ERP Replacement Update slide pack

**7.4.1 Appendix A – ERP Replacement Update slide pack**

# ERP Replacement Update

28 August 2025



**PROGRAMME ENTERPRISE**  
BETTER INFO > DECISIONS > OUTCOMES

## Following Business Case approval in December 2024, we have:

- Negotiated new contracts with Datacom
- On-boarded the team
- Set up the governance structure
- Shifted from 'project' to 'programme' – a collection of related spanning multiple years



## Following Business Case approval in December 2024, we have:

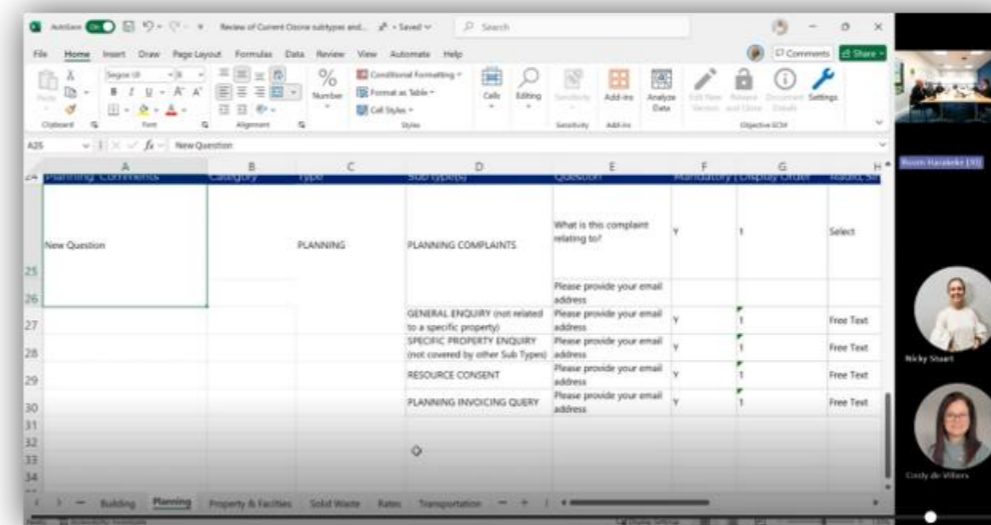
- Commenced the CRM (Customer Relationship Management) Project
- Approved the design for managing contacts and service requests in Datascape, as well as online service requests via Antenno App and our online customer portal
- Progressed cleansing of our data to support data migration



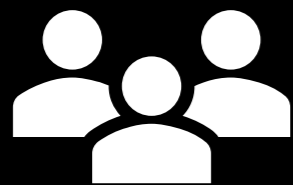
7.4.1 Appendix A – ERP Replacement Update slide pack(Cont.)

# Following Business Case approval in December 2024, we have:

Initiated and facilitated workshops with impacted teams from across the business



# Workshop stats at a glance



15

Workshops held



29

Workshop hours



112

Participants involved



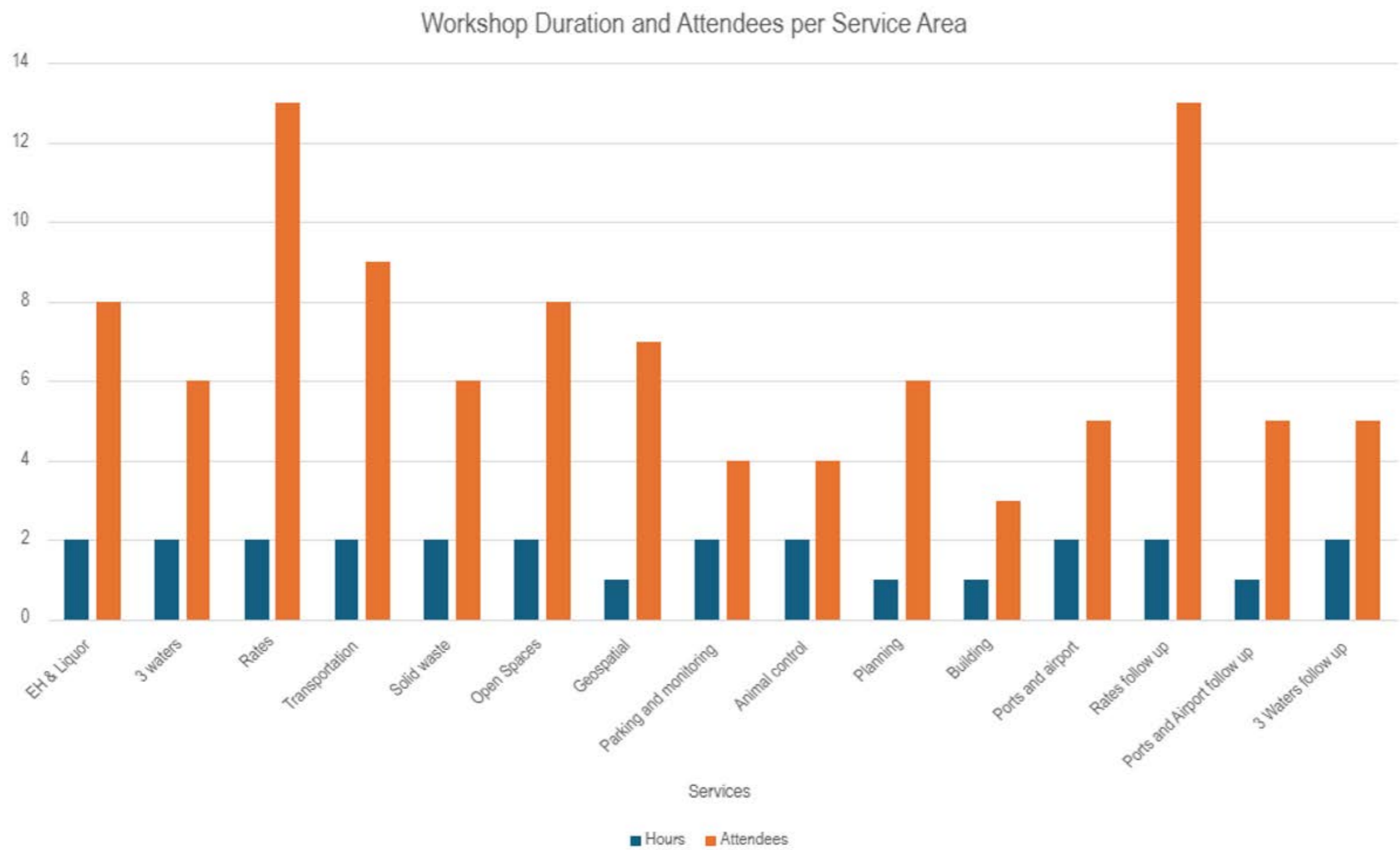
228

Cumulative participant hours



PROGRAMME ENTERPRISE  
BETTER INFO > DECISIONS > OUTCOMES

7.4.1 Appendix A – ERP Replacement Update slide pack(Cont.)



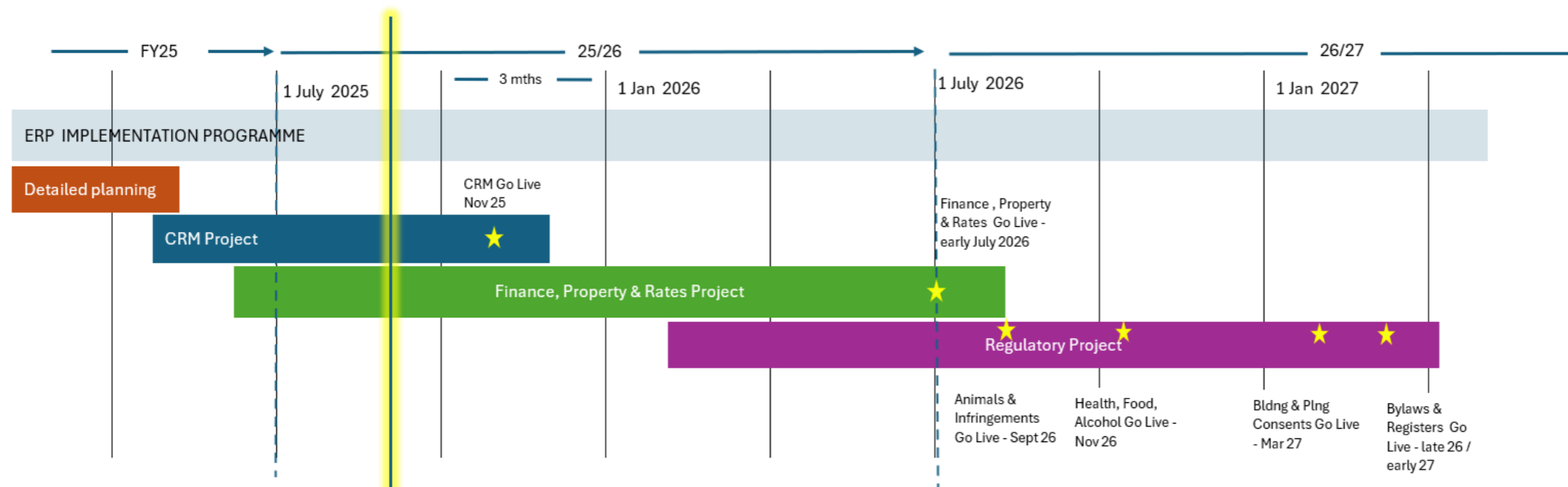
## Following Business Case approval in December 2024, we have:

- We've met with other Councils to learn from their Datascape journeys, including:
  - Ōpōtiki District Council
  - Taranaki Regional Council
  - Western Bay of Plenty District Council
  - Kawerau District Council
  - Otago Regional Council
  - Kāpiti Coast District Council



7.4.1 Appendix A – ERP Replacement Update slide pack(Cont.)

# Our timeline



## Key risks

- Data migration
- Integrations
- Change management
- Implementation delays



# Our budget

	24/25	25/26	26/27	TOTAL	LTP Variance
LTP 24/34 budget	2,370,000	1,880,000	-	4,250,000	
Business case budget (includes contingency)	2,246,316	1,843,988	676,581	4,766,885	-516,885
Current budget (includes contingency)	756,474 (Actuals)	2,235,888	1,763,927	4,756,289	-506,289

# Our budget

- We're where we planned to be
- Through the Annual Plan 2026–27 process, we will:
  - Rephase the majority of spend by a year
  - Address the est \$500,000 shortfall, noting that this will not lead to a direct rates impact for 26/27 due to the programme being funded via internal loan

**7.5 Draft Annual Report**

**7.5 Draft Annual Report**

This report will be provided in a Supplementary agenda - to be published on Monday 25 August.

**7.6 Three Waters Rating Review Report****7.6 Three Waters Rating Review Report**To: **Finance and Performance Committee**Date: **Thursday, 28 August 2025**Author/ **J McGeough / Acting General Manager Finance**  
Authoriser:Reference: **A2948670****1. Reason for the report - *Te Take mō tēnei rīpoata***

On 26 September 2024 (A2748061), the Infrastructure and Planning Committee directed staff to begin work on a Three Waters Rating Review project. This report brings the options that have been considered to the committee for consideration.

Since the above date several workshops have been held that explored a variety of options that are available to Council in the setting of rates to recover the cost of 3 waters.

This Report proposes that the Committee recommend to Council its preferred options that can be considered by the new Council following the impending local government elections.

**2. Recommendations - *Tohutohu akiaki***

1. THAT the Finance and Performance Committee **receive** the Three Waters Rating Review report; and,
2. THAT the Finance and Performance Committee **recommend** the Whakatāne District Council **approve** the following changes to the rate tools used to recover the costs of the 3 water activities:
  - a. **Water supply**
    - i. Increase the variable percentage from 60% to 80%.
    - ii. Equalisation of Plains and Murupara schemes into a District scheme for all ratepayers that either are connected or could connect to a Council water supply. (Whakatāne, Ōhope, Edgecumbe, Matatā, Tāneatua, Rūātoki, Waimana, Te Mahoe communities).
    - iii. Extend the current arrangements of water meter deployment and volumetric charging to a universal approach, across the District.
    - iv. Introduce a differential (increasing) based on size of connection.
    - v. Modify the rating treatment of bulk water-by-meter from a step-up rate to a step-down rate.
  - b. **Wastewater**
    - i. Equalisation of the Murupara scheme into a District scheme for all ratepayers that either are connected or could connect to a Council wastewater scheme (Whakatāne, Ōhope, Edgecumbe, Tāneatua, Te Mahoe communities).

**7.6 Three Waters Rating Review Report(Cont.)****c. Stormwater**

- i. 30% of the stormwater costs be funded from the General rate.
- ii. Abolish the Te Mahoe Land Drainage area and create a Te Mahoe stormwater area. Abolish the Te Teko Land Drainage area and create a Te Teko stormwater area.
- iii. Equalisation of Whakatāne, Matatā, Ōhope, Edgecumbe, Tāneatua, Murupara, Te Mahoe and Te Teko stormwater rating areas into a District scheme for all ratepayers that are in and identified stormwater area of benefit. (As set out on stormwater maps).
- iv. All commercial/industrial properties within the stormwater areas (including properties outside of Whakatane) shall have the current 2.2 differential applied

**d. Transition**

- i. A transition plan developed to consider both the increases due to the need to improve the existing schemes and the associated increases in costs over time and the changes proposed above. This is to smooth fluctuations in rates, with some rates decreasing in the first years of the transition but increasing in the later years or vice versa.
- ii. Consider that the transition be spread over 3 years and be on specific targeted rates, rather than General rates on ratepayer groups.

**3. Background - *He tirohanga whakamuri***

The current water rates system has not been comprehensively reviewed since 2014-15. With future changes required by the new water services entities (being either a Council Control Organisation or a Council business unit), Council undertook a review to ensure that the current rates are fit for purpose.

The current approach has resulted in the inability of some smaller schemes to carry out the appropriate capital expenditure including renewals because of insufficient funding. By equalising schemes, this provides a larger pool of users that will enable future expenditure to be more evenly applied and affordable.

While both water and wastewater have been generally equalised or harmonised over the District, the Plains and Murupara water supplies together with Murupara wastewater have not been for a variety of reasons. Stormwater operates under eight different schemes currently. The water rates review considered the implications of equalising all three water activities.

The Plains and Awakeri Extension water supply has been in existence for a considerable period of time and, what is now in place compared with what was originally established is significantly different. This is explained further in Appendix 3.

**4. Discussion – Kōrerorero**

Principles used in the review:

- Ensure compliance with legislation:
- Honouring our obligations under Te Tiriti o Waitangi.
- Alignment to our strategic goals.

**7.6 Three Waters Rating Review Report(Cont.)**

- Ensuring we maintain financial prudence and sustainability.
- Delivering community outcomes.
- Water conservation considerations.
- Fair and equitable charging.
- Users pay their fair share of costs.
- Consideration of affordability.

Principles used in the consideration of equalisation:

- Reduce administrative burden & increase efficiency.
- Recognise area/District-wide benefits of the Activity.
- Effectively attribute costs to properties that benefit from the Activity versus users of the Activity.
- Consistency with the other water activities.
- Would smooth out future changes.

The following was excluded from the review:

- The funding or recovery of capital expenditure including the use of debt. However, included in each of the activities (Water supply Wastewater and Stormwater) are the loan costs - interest and principal repayments.
- The use of development and/or financial contributions. This would be a significant, separate piece of work.

Several workshops and briefings have been held to help Council understand the proposed options and challenges of the 3 Waters equalisation proposal. The most recent presentation, delivered in a public excluded Council briefing, consolidated these discussions.

The exclusion was due to the sensitive nature of the financial modelling and strategic options, which were still in draft form. However, given the proposal's potential significance and its potential impact on ratepayers, there is now a clear rationale for making the presentation publicly available to support transparency and informed community engagement. This presentation is included as Appendix 4 - 3 Waters Rating Review presentation.

## 5. Options Analysis - *Ngā Kōwhiringa*

### 5.1. Water supply

Key options considered:

- Level of fixed rates versus water-by-meter rates.
- Equalise the rates and water-by-meter rates.
- Metering and volumetric charging of all properties.
- Method of charging for availability.

The range of options that are available range  
FROM:

**7.6 Three Waters Rating Review Report(Cont.)**

- 100% water by meter (with no fixed rate or fee) with minor fees & charges for new connection cost, but not a contribution towards the capital cost.

TO:

- Use of a fixed rate for all connected properties.
- Use of a fixed rate for all non-connected properties. Availability.
- This can be based on several factors including:
  - a. All properties that can be connected.
  - b. Within 100 meters of a Council main.
  - c. Fixed and variable costs.
  - d. Can be assessed on the general ability to use the service.

**5.2. Level of fixed rates versus water by meter rates**

By having a 100% of the water costs recovered by way of water meter volume would result in a true user pays approach on the basis that if a property used no water, then no fee would be payable, compared to a property that used a significant amount of water then contribution would be significant.

The risk for a local authority relates to revenue sufficiency as there are significant fixed costs in providing the infrastructure and operational costs that will remain whether a large or smaller amount of water is produced. Therefore, in years of high demand, there is likely to be more than sufficient revenue raised to cover the operational costs, conversely in years of low demand there is a likelihood that the revenue raised by way of water meter income would be insufficient to meet the operational costs which would lead to a deficit that would need to be recovered in subsequent years.

Therefore, a change in the percentage of variable costs to a higher percentage would have better alignment with a user-pays philosophy and would benefit those properties that consume less than the average water consumption. Conversely the properties that use more water would see an increase in the total water rates being paid.

Moving the fixed /variable slider towards more fixed, less variable would reduce the risk of insufficient revenue raised to cover the operational costs. This approach would help mitigate potentially large increases to bulk users on the Plains. However, this option is inconsistent with our principles of users-pays.

**5.3. Equalisation of Plains and Murupara schemes**

If all schemes were equalised, then Murupara would see a slight increase as 95% are non-metered – currently \$846.29 (incl. GST). However, if properties were metered that would provide the ability for users to control their own costs by modifying their water consumption.

Plains connections would see ascending increases based on usage. Bulk users would see much larger overall percentage increases than the low users.

A step-down variable rate would help mitigate the large increases for bulk users on the Plains and would apply to users in all schemes.

**7.6 Three Waters Rating Review Report(Cont.)****5.4. Charging of all properties by water meters and volumetric charging**

Currently 85% of all connected consumers have a metered connection which is then used for charging a water-by-meter rate. There are a further 10% that have water meters which are not used for charging, but for monitoring only. The remaining 5% do not have meters.

To ensure consistency across the district and to provide a more user-pays approach, universal metering and volumetric charging is recommended. This will allow all consumers to influence the amount that they pay for water by controlling their consumption. Metering and volumetric charging promotes conservation. It also impacts on wastewater volumes in serviced areas providing a double benefit. Volumetric charging can be phased in over time.

**5.5. A differential (increasing) based on size on connection**

Currently all properties, irrespective of their connection size, are assessed the same fixed rate. With a larger connection size there is the ability for a user to draw a significant amount of water over a relatively short period of time. This may create challenges for the balance of the water network. Pressures fall locally below normal level-of-service, adversely affecting neighbours – especially downstream. Levels in Council's storage facilities fall accordingly. Having the fixed charge based on the connection size recognises the infrastructure necessary for larger connection sizes. It also incentivises correctly sizing connections for required usage and possibly more moderate demand on the public system.

Introducing fixed charges based on connection size will have a small positive impact on most connections but would impact the 2% with larger connections who would pay more.

**5.6. Bulk water-by-meter**

This currently applies only at Plains and Awakeri Extension. If users exceed the allocated entitlement volume this extra amount is assessed at \$1.04 per cubic meter as opposed to the standard rate of \$0.86 (both incl. GST). Effectively a penalty rate.

Through the options analysis and modelling that was undertaken if all schemes were to be amalgamated then the bulk users in the Plains & Awakeri scheme would be significantly affected compared to the current situation. One way of managing this impact would be the introduction of a reduced/discounted water rate for those exceeding a certain level of consumption per quarter, per connection. For consistency it would be considered appropriate that all consumers, irrespective of location, be assessed on this basis. The excess-water volumetric cost must be set above the variable cost of production in accordance with normal business practice.

Current modelling allows for a single step bulk discount. This would apply to all usage over 2,000 per year, per connection (Valuation #), with a discount of 25% applying to every cubic metre above the 2,000 level. It is thought this would apply to some 300 ratepayers – District-wide.

Either the trigger level (2,000) or the percentage discount (25%), or both, could be changed by Council prior to consultation or as a result of the consultation.

**5.7. Method of charging for availability**

Due to the small number of connections affected, modifying the availability charge is not considered a priority at this stage, therefore no change is proposed. However, if Council resolves to reduce the fixed charge, then Council may elect to revisit this.

**7.6 Three Waters Rating Review Report(Cont.)*****As Recommended:***

1. Increase the variable percentage from 60% to 80%.

**5.8. Advantages and Disadvantages**

Advantages and disadvantages of increasing the variable percentage from 60% to 80%.

Advantages	Disadvantages
Promotes water conservation more strongly.	Financially less certain. Leaves Council open to unbudgeted losses/over charges (mitigated as we have a 40:60 split already).
Supports the user-pays principle.	Little contribution towards the cost of the network by low users.
Enables users more control over household costs.	Based on the current approach, this would see a corresponding reduction for those properties that are not connected. (Availability charge could be changed.)

Advantages and disadvantages of equalisation of Plains and Murupara schemes into a District scheme.

Advantages	Disadvantages
Enables greater funding pool for smaller schemes.	In the short term there will need to be cross subsidisation.
Reduces complexity in setting rates and managing multiple schemes.	In the short term there will be different level of service.
Provides longer term stability in revenue and expenditure.	

Advantages and disadvantages of progressively introducing the charging of all properties by way of water meters and volumetric rating.

Advantages	Disadvantages
Provides consistency across the district.	Resistance from higher water users that aren't metered.
Provides a clearer user-pays approach.	Reduces certainty of income for the Council.
Enables consumers to influence their amount of water being consumed and therefore costs.	Requires short term expenditure in providing water meters for those properties that are not metered.

**7.6 Three Waters Rating Review Report(Cont.)**

Advantages	Disadvantages
Enhances leak detection and repairs.	Requires ongoing expenditure reading meters and billing accordingly.
Reduces overall water usage. Direct signal to users to conserve.	
Reduces wastewater volumes too in networked areas.	
Do not need to review the adequacy of the non-metered fixed rate.	

Advantages and disadvantages of a differential (increasing) based on size of connection.

Advantages	Disadvantages
Assigns higher costs to bulk (or potentially bulk) water users. These are generally businesses.	Departs from a truly user-pays approach.
Enables the user to potentially reduce their cost by asking Council to reduce the size of the connection.	
Encourages removal of obsolete connections.	

Advantages and disadvantages of modifying the bulk water by meter regime.

Advantages	Disadvantages
Recognises the marginal cost of producing water for bulk users.	More complex invoicing processes.
	Can be seen as subsidising bulk users.
Council operating in a businesslike manner.	Can be seen as discouraging conservation. (Although charges still apply to every cubic metre).
Reduces risk of alternative self-sourcing.	

**6. Wastewater**

The key issues that were considered as part of the development of the recommendation were that Murupara faces significant capital works in the near future and with less than 800 connections to spread that cost over makes it unaffordable. The rest of the district's wastewater is already equalised.

**7.6 Three Waters Rating Review Report(Cont.)**

Key options considered:

- Method of charging for availability
- Equalise the rates

The range of options are limited:

- Use of a fixed rate for all non-connected properties

This can be based on several factors including:

- All properties that can be connected
- Within 30 meters of a Council main
- Fixed and variable costs
- Can be assessed on the general ability to use the service

**6.1. Method of charging for availability**

Due to the small number of connections, modifying the availability charge is not considered a priority at this stage, therefore no change is proposed.

***As Recommended:***

Equalisation of Murupara scheme into a District scheme for all ratepayers that either are connected or could connect to a Council wastewater scheme. \*\* Whakatāne, Ōhope, Edgecumbe, Tāneatua, Te Mahoe.

**6.2. Advantages and disadvantages**

Advantages and disadvantages of the recommended equalisation of Murupara scheme into a District scheme)

Advantages	Disadvantages
Would smooth out future increases for rates for Murupara ratepayers.	Murupara ratepayers would see a near-term increase.
Reduces administrative burden & increases efficiency.	
Allows best practice network management to occur with a level-of-service focus rather than persistent cost implication concerns.	

**7. Stormwater**

Currently stormwater costs are recovered through targeted rates on properties within identified areas. Those targeted rates are based on an estimate of the spend within an identified area. Some of those areas have relatively low revenue which then restricts the amounts that can be spent on

**7.6 Three Waters Rating Review Report(Cont.)**

stormwater within those areas. This has led to potentially inadequate expenditure being undertaken within certain areas. If there is a need for remediation within a small area there is a significant rate increase required to fund the shortfall. Timing lags occur with budgeting for future Financial years.

It is generally accepted that stormwater provides benefit not only to the direct area but indirectly to the whole District. A good stormwater scheme will reduce the likelihood of flooding and therefore provide a wider benefit to the whole District rather than just to a specific area. This is reflected in the current Revenue and Financing policy which provides for up to 30% of the stormwater activity to be funded by way of general rate. If flooding does occur, then, to an extent it is the whole community or District that suffers as a result.

Options range from:

- 100% from Capital value including differential to the use of a fixed rate or differential for all properties with an identified area.
- A contribution from the district as a whole up 30%. That contribution from the district can be recovered either by capital value or a fixed per Property which could be included within the uniform Annual General Charge.
- Stormwater has district-wide benefits rather than being directly isolated and attributable to the immediate properties within each stormwater scheme.
- Equalising stormwater recognises that having district-wide access to our roads, businesses, friends, family, and wider community, benefits more than just the people directly situated within each stormwater scheme.
- Introducing up to 30% general rate funding for stormwater, recognises similar principles as equalisation, but recognises those benefits apply also to people outside one of the current 8 schemes
- All commercial/industrial properties (including those outside of Whakatane) would have the 2.2 differential applied.

**7.1. Advantages and Disadvantages**

Advantages and disadvantages equalising all schemes

<b>Advantages</b>	<b>Disadvantages</b>
Reduces administrative burden & increase efficiency.	There will be ratepayers who will see an increase in their rates.
Simpler, more efficient model. Minor cost savings.	
Stormwater has District-wide benefits rather than being directly isolated and attributable to the immediate properties within each stormwater scheme.	
Would smooth out future changes.	
Investment decisions more soundly based.	

**7.6 Three Waters Rating Review Report(Cont.)**

Advantages and disadvantages all commercial/industrial properties having the 2.2 differential applied

Advantages	Disadvantages
Consistency of treatment of commercial properties, irrespective of location.	Increase in rates for commercial/industrial properties outside of the Whakatane urban area.
Would make stormwater equalisation less complex.	
Reduction (small) in rates for residential properties.	

Advantages and disadvantages of a District-wide contribution

Advantages	Disadvantages
Reduction in rates for some areas and reduced increase for this.	Increase in rates for properties outside the existing stormwater areas.
Recognizes those benefits apply also to ratepayers outside of the current schemes.	

## 8. Significance and Engagement Assessment - Aromatawai Pāhekoheko

### 8.1. Assessment of Significance

The decisions and matters of this specific report are assessed to be of **low** significance in accordance with the Council's Significance and Engagement Policy. However, this report is part of a broader process that is, or may be in future, be assessed as having moderate/high significance.

### 8.2. Engagement and Community Views

Both standard and targeted consultation processes would accompany a final proposal. Community input would be actively sought.

## 9. Considerations - *Whai Whakaaro*

### 9.1. Strategic Alignment

As noted above, all options that have been presented are consistent with the Revenue and Financing policy and therefore the Financial Strategy.

### 9.2. Legal

The next step in the proposal would be to obtain a legal review to ensure the final options are legally compliant with both the Local Government Act 2002 and the Local Government (Rating) Act 2002.

**7.6.1 Appendix 1 - Details of current Revenue and Financing policy and rates for 2025/26****9.3. Financial/Budget Considerations**

There are no budget considerations associated with this report. The budgeted proposals are about reallocating the existing total rates that need to be collected for three waters.

**9.4. Climate Change Assessment**

Any reduction in water use has a flow on effect on wastewater in urban areas. This directly leads to reduced UV, pumping and energy requirements. Drinking water reductions themselves also lead to treatment chemical reductions. All of these are positives for reducing embodied carbon emissions.

**9.5. Risks**

Increasing the variable amount being charged increases the risk of not achieving the budget and thus leading to a shortfall. Careful budgeting helps to address this risk.

There is also a risk of pricing oneself out of the market. This could result in ratepayers seeking alternative water self-sourcing. Several approaches are available to deal with this risk – customer engagement and optioneering, market comparisons with other geographic areas and careful transition planning to avoid acute shocks. The proposed discounting for bulk users also helps to address this risk.

**10. Next Steps – E whai ake nei**

The next step in the process will be for the new Council to be briefed on the proposal and to develop the final proposal for consultation in parallel with the 2026/27 Annual Plan with implementation starting from 1 July 2026.

**Attached to this Report:**

- Appendix 1 - Details of current Revenue and Financing Policy and Rates for 2025/26
- Appendix 2 - Rating implications if there was a change based on the recommended options without any transition
- Appendix 3 - The Plains rating model – the case for change
- Appendix 4 - 3 Waters Rating Review presentation

**7.6.1 Appendix 1 - Details of current Revenue and Financing policy and rates for 2025/26**

## Finance and Performance Committee - AGENDA

**7.6.1 Appendix 1 - Details of current Revenue and Financing policy and rates for 2025/26(Cont.)****Appendix 1 - Details of the current Revenue and Financing policy and rates for the 2025/26 year****Water supply**

The current Revenue and Financing Policy provides for 70% to 100% of the revenue required to come from targeted rates, with no other specific sources of funding identified.

Note – Water by meter is a targeted rate.

The current 2025/26 rates inclusive of GST are as follows:

	Connected metered	Connected non metered	Available not connected	Water by meter	Excess water by meter*
Plains and Awakeri Extension	\$437.99			\$0.86	\$1.04
Murupara	\$354.11	\$846.29	\$354.11	\$2.14	-
All Other Schemes **	\$338.78	\$1,016.60	\$338.78	\$2.94	-

\* The Council sets an additional targeted rate for any excess water consumed that is over and above the purchased entitlement for each rating unit connected to the Plains and Awakeri Extension water supply scheme. An overuse targeted rate is set for the excess volume consumed over and above the purchased entitlement of \$1.04 inc GST per cubic metre.

Note: Where rating units meet the definition of being contiguous either under legislation or Council Policy, the entitlements for such properties will be aggregated prior to an imposition of the overuse penalty.

\*\*Whakatāne, Ōhope, Edgecumbe, Matatā, Tāneatua, Rūātoki, Waimana, Te Mahoe

**Wastewater**

The current Revenue and financing policy splits the funding into two sub activities, being Wastewater services and Trade waste.

(a) Wastewater services 70% to 100% targeted rates

9b) Trade waste 70% to 100% Fees & charges

No other specific sources of funding are identified. Prices include GST.

	Connected -	Available - not connected
Murupara	\$472.83	\$236.42
All Other Schemes **	\$691.69	\$345.85

\*\* Whakatāne, Ōhope, Edgecumbe, Tāneatua, Te Mahoe

**Stormwater**

The current Revenue and Financing Policy provides for the funding for stormwater to come from the following sources:

- General rates 0% to 30%
- Targeted rates 70% to 100%

The current 2025/26 rates inclusive of GST are as follows:

## Finance and Performance Committee - AGENDA

**7.6.1 Appendix 1 - Details of current Revenue and Financing policy and rates for 2025/26(Cont.)**

	Fixed targeted rate per rateable unit	Differential	Rates per capital value per property
Whakatāne	\$186.66	1	0.00058705
Whakatāne Commercial and Industrial	\$186.66	2.2	0.00129151
Matatā	\$109.95	1	0.00058705
Ōhope	\$112.45	1	0.00024888
Edgecumbe	\$176.62	1	0.00069357
Tāneatua	\$49.29	1	0.00039846
Murupara	\$10.17	1	0.00017335
Te Mahoe	\$144.94	1	0.00146977
Te Teko	\$35.24	1	0.00048720

**7.6.2 Appendix 2 - Rating implications if a change based on the recommended options without any transition**

**7.6.2 Appendix 2 - Rating implications if a change based on the recommended options without any transition**

## Finance and Performance Committee - AGENDA

**7.6.2 Appendix 2 - Rating implications if a change based on the recommended options without any transition(Cont.)****Appendix 2 - Rating implications if there was a change based on the recommended options without any transition INCLUSIVE GST**

<b>Water supply</b>	Connected metered	Connected non metered	Available not connected	Water by meter	Excess water by meter*
<b>2025/26 rates</b>					
Plains and Awakeri Extension	\$437.99			\$0.86	\$1.04
Murupara	\$354.11	\$846.29	\$354.11	\$2.14	-
All Other Schemes	\$338.78	\$1016.60	\$338.78	\$2.94	-
<b>Assumed rates if equalised</b>					
All Other Schemes	\$382.46	\$859.12	\$382.46	\$2.07	-
<b>Movement</b>					
Plains and Awakeri Extension	-\$55.53			\$1.21	\$1.04
Murupara	\$28.35	\$12.83	\$28.35	-\$0.07	
All Other Schemes	\$43.68	-\$157.48	\$43.68	-\$0.87	

<b>Wastewater</b>	Connected -	Available - not connected
Murupara	\$472.83	\$236.42
All Other Schemes	\$691.69	\$345.85
<b>Assumed rates if equalised</b>		
District	\$678.14	\$339.08
<b>Movement</b>		
Murupara	\$205.31	\$102.66
All Other Schemes	-\$13.55	-\$6.77

<b>Stormwater</b>	Fixed targeted rate per rateable unit	Rates per capital value per property	Median (50%) CV	Median (50%) property per group
<b>25/26 rates</b>				
Whakatāne	\$186.66	0.00058705	\$670,000	\$579.98
Whakatāne Commercial and Industrial	\$186.66	0.00129151	\$720,000	\$1,116.55
Matatā	\$109.95	0.00058705	\$560,000	\$438.70
Ōhope	\$112.45	0.00024888	\$1,190,000	\$408.62
Edgecumbe	\$176.62	0.00069357	\$540,000	\$551.15
Tāneatua	\$49.29	0.00039846	\$310,000	\$172.81
Murupara	\$10.17	0.00017335	\$170,000	\$39.64
Te Mahoe	\$144.94	0.00146977	\$280,000	\$556.48
Te Teko	\$35.24	0.00048720	\$215,000	\$139.99

## Finance and Performance Committee - AGENDA

**7.6.2 Appendix 2 - Rating implications if a change based on the recommended options without any transition(Cont.)**

<b>Assumed rates if equalised</b>				
District wide 30% General rate		0.00012110		
Non commercial	106.71	0.00032901		
Commercial and Industrial	106.71	0.00072382		
<b>Movement</b>				
Whakatāne	-\$79.95	-0.00013694	\$670,000	-\$171.70
Whakatāne Commercial and Industrial	-\$79.95	-0.00044659	\$720,000	-\$401.49
Matatā	-\$3.24	-0.00013694	\$560,000	-\$79.93
Ōhope	-\$5.74	0.00020123	\$1,190,000	\$233.72
Edgecumbe	-\$69.91	-0.00024346	\$540,000	-\$201.38
Tāneatua	\$57.42	0.00005165	\$310,000	\$73.43
Murupara	\$96.54	0.00027676	\$170,000	\$143.59
Te Mahoe	-\$38.23	-0.00101966	\$280,000	-\$323.73
Te Teko	\$71.47	-0.00003709	\$215,000	\$63.50
Impact on properties outside current stormwater areas	-	0.00012110	\$750,000	\$90.83

Note: Commercial and industrial outside the current Whakatāne 2.2 differential, will see a variety of increases based on their current 'rates per capital value' vs new total of 0.00084492

**7.6.3 Appendix 3 - The Plains rating model – the case for change**

**7.6.3 Appendix 3 - The Plains rating model – the case for change**

**7.6.3 Appendix 3 - The Plains rating model – the case for change(Cont.)****Appendix 3 - The Plains water rating model – the case for change****The Braemar scheme (incl. later additions) was enormously successful:**

Early capital contributions have proven to be wonderful investments.

The scheme was operated with two main opex/capex cost focusses:

- Keep operating costs to a minimum, and
- Gather capital contributions where possible via managed entry of newcomers to the scheme.  
For example, new entrants were charged gross capital cost not nett, recognising central government subsidy.

The entitlement system encourages retention of obsolete connections (offering a pathway to discounted water via the entitlement that applies to contiguous parcels).

**The Plains (2025) bears almost no resemblance to Braemar (1980):**

- Customer connections now total about 10 times as many as at inception – circa 1900 versus 196.
- The Plains is no longer the rural-focussed scheme that it once was – 1206 properties use less than 541 cu. m per year, 723 customers use less than 250 cu. m per year, 71 use zero.
- With its new arsenic removal plant Braemar is facing high future opex costs for media replacement.

**Issues require investment. The following are some of the issues facing the Plains scheme:**

- Much of the pipework is PVC – 72% according to water safety plan. This material was relatively innovative when installed but is now 45 years old and reaching end-of-life. Increasing brittleness is apparent. Service personnel nickname some of the pipework as “eggshell” pipework.
- The majority of the pipes are undersized. They were right-sized when installed but the network growth mentioned above has exceeded network capacity in many areas.
- Depreciation funding (based on the small pipes) is insufficient to fund the system replacement, renewal, and upgrade needs.
- Much of the pipework is Grade B (suitable for 600kPa pressure). Working pressure is approx. 900kPa which necessitates Grade C pipe.
- Inadequate water pressure at peak times is common at the outer limits of the network.
- Inadequate water flow/volume is also common.
- Reservoir storage is below 24hr. The new Otumahi reservoir will assist.
- On-property leakage is common due to faults and possibly age. Leak remissions are high.
- Also see note above about arsenic adsorptive media.

**7.6.3 Appendix 3 - The Plains rating model – the case for change(Cont.)**

**When Otumahi was launched in 2017 it was treated separately to the Plains for billing purposes. The logic behind this situation does not withstand scrutiny any longer.**

The two schemes now both enjoy particularly good water quality. This was not the case at the inception of the Otumahi scheme.

The two systems are effectively interconnected. Valving is adjusted as needed. This is for pressure management reasons, operational practicality and provides much better resilience for breakages and other outages.

Depending on local conditions and timing, water flows in either direction between the two schemes.

**Equity issues - Comparisons**

A significantly unfair situation has developed where different water pricing cannot reasonably be justified. Compare Te Teko @ \$0.75 per cubic metre versus Edgecumbe at \$2.56 per cubic metre (excl. GST) – more than triple.

The same comparison could be made between Awakeri and Rūātoki for example using the same numbers or Plains and Murupara using similar figures.

**7.6.4 Appendix 4 - Three Waters Rating Review presentation**

**7.6.4 Appendix 4 - Three Waters Rating Review presentation**

7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# 3Waters Rating Review

Council Briefing: 30 July 2025

Presented by: Justin McGeough



7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Agenda



- Brief recap of June guidance
- Modelling
- Transition planning
- Forthcoming report to Finance & Performance  
– 28 August 2025

*Photo caption*





## Input parameters - Stormwater

Full equalisation

2.2 differential to apply to all schemes –  
Commercial & Industrial.

30% district-wide contribution applies

Fixed v capital proportions to continue

Transition period proposed





# Input parameters - Wastewater

Full equalisation

Transition period proposed





# Input parameters - Water Supply

Full equalisation

Declining block charging

The metering & volumetric charging journey continues

“Fixed” component may decline. Over time?

“Fixed” component to vary according to size (capacity)

Transition period proposed



7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Modelling



- A series of slides follow showing the effects of the proposed rating model.
- An integrated 3W approach.
- We can't show you everything! 136,000 lines of past billing data.



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

10<sup>th</sup> Percentile

10th Percentile	CV	cbm	3W 25/26	Impacts of equalisation	3W Equalised	Metered WS	Unmetered WS	WW	SW Scheme	General rate SW
Edgecumbe	\$425,000	52	\$1,653.78	-\$179.36	\$1,474.42	Y		Y	Y	Y
Ōhope	\$755,000	52	\$1,482.75	\$133.45	\$1,616.20	Y		Y	Y	Y
WHK Residential	\$465,000	52	\$1,642.03	-\$158.61	\$1,483.42	Y		Y	Y	Y
WHK Commercial	\$315,000	52	\$1,775.88	-\$235.61	\$1,540.27	Y		Y	Y	Y
Te Mahoe	\$280,000	230	\$2,264.63	-\$494.64	\$1,769.99		Y	Y	Y	Y
Tāneatua	\$200,000	230	\$1,819.17	-\$71.68	\$1,747.49		Y	Y	Y	Y
Murupara	\$57,000	230	\$1,338.95	\$330.12	\$1,669.06		Y	Y	Y	Y
Matatā	\$67,000	230	\$1,055.81	-\$164.74	\$891.07		Y		Y	Y
Te Teko	\$82,600	52	\$566.18	\$70.63	\$636.81	Y			Y	Y
Rural with Whk WS	\$107,000	52	\$490.70	\$11.53	\$502.23	Y				Y
Rural with Plains WS	\$107,000	96	\$524.03	\$69.94	\$593.97	Y				Y
Rural no current 3W	\$107,000		\$0.00	\$12.96	\$12.96					Y



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

30<sup>th</sup> Percentile

30th Percentile	CV	cbm	3W 25/26	Impacts of equalisation	3W Equalised	Metered WS	Unmetered WS	WW	SW Scheme	General rate SW
Edgecumbe	\$500,000	109	\$1,875.37	-\$252.46	\$1,622.91	Y		Y	Y	Y
Ōhope	\$1,010,000	109	\$1,715.79	\$134.42	\$1,850.21	Y		Y	Y	Y
WHK Residential	\$580,000	109	\$1,879.12	-\$224.70	\$1,654.42	Y		Y	Y	Y
WHK Commercial	\$530,000	109	\$2,223.13	-\$381.97	\$1,841.16	Y		Y	Y	Y
Te Mahoe	\$280,000	230	\$2,264.63	-\$494.64	\$1,769.99		Y	Y	Y	Y
Tāneatua	\$285,000	230	\$1,848.62	-\$74.13	\$1,774.49		Y	Y	Y	Y
Murupara	\$148,300	230	\$1,354.77	\$355.70	\$1,710.47		Y	Y	Y	Y
Matatā	\$420,000	230	\$1,372.98	-\$209.12	\$1,163.87		Y		Y	Y
Te Teko	\$170,000	109	\$778.33	\$17.89	\$796.23	Y			Y	Y
Rural with Whk WS	\$410,000	109	\$660.27	-\$121.36	\$538.92	Y				Y
Rural with Plains WS	\$410,000	222	\$637.66	\$255.23	\$892.89	Y				Y
Rural no current 3W	\$410,000		\$0.00	\$49.65	\$49.65					Y



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

50<sup>th</sup> Percentile

50th Percentile	CV	cbm	3W 25/26	Impacts of equalisation	3W Equalised	Metered WS	Unmetered WS	WW	SW Scheme	General rate SW
Edgecumbe	\$540,000	157	\$2,043.84	-\$308.48	\$1,735.36	Y		Y	Y	Y
Ōhope	\$1,190,000	157	\$1,901.31	\$128.87	\$2,030.18	Y		Y	Y	Y
WHK Residential	\$670,000	157	\$2,072.68	-\$276.55	\$1,796.12	Y		Y	Y	Y
WHK Commercial	\$720,000	157	\$2,609.24	-\$508.59	\$2,100.64	Y		Y	Y	Y
Te Mahoe	\$280,000	230	\$2,264.63	-\$494.64	\$1,769.99		Y	Y	Y	Y
Tāneatua	\$310,000	230	\$1,857.29	-\$69.29	\$1,788.00		Y	Y	Y	Y
Murupara	\$170,000	230	\$1,358.54	\$361.39	\$1,719.93		Y	Y	Y	Y
Matatā	\$560,000	230	\$1,455.17	-\$228.29	\$1,226.88		Y		Y	Y
Te Teko	\$215,000	157	\$940.98	-\$29.01	\$911.97	Y			Y	Y
Rural with Whk WS	\$750,000	157	\$801.00	-\$2.73	\$798.27	Y				Y
Rural with Plains WS	\$750,000	404	\$800.29	\$509.08	\$1,309.37	Y				Y
Rural no current 3W	\$750,000		\$0.00	\$90.83	\$90.83					Y



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

70<sup>th</sup> Percentile

70th Percentile	CV	cbm	3W 25/26	Impacts of equalisation	3W Equalised	Metered WS	Unmetered WS	WW	SW Scheme	General rate SW
Edgecumbe	\$570,000	224	\$2,260.36	-\$373.89	\$1,886.47	Y		Y	Y	Y
Ōhope	\$1,450,000	224	\$2,161.74	\$120.83	\$2,282.57	Y		Y	Y	Y
WHK Residential	\$790,000	224	\$2,338.84	-\$351.09	\$1,987.75	Y		Y	Y	Y
WHK Commercial	\$1,031,000	224	\$3,206.61	-\$705.59	\$2,501.03	Y		Y	Y	Y
Te Mahoe	\$280,000	230	\$2,264.63	-\$494.64	\$1,769.99		Y	Y	Y	Y
Tāneatua	\$340,000	230	\$1,867.68	-\$68.43	\$1,799.25		Y	Y	Y	Y
Murupara	\$193,500	230	\$1,362.61	\$368.57	\$1,731.18		Y	Y	Y	Y
Matatā	\$680,000	230	\$1,525.62	-\$244.72	\$1,280.90		Y		Y	Y
Te Teko	\$240,000	224	\$1,148.88	-\$89.08	\$1,059.79	Y			Y	Y
Rural with Whk WS	\$1,130,000	224	\$996.72	-\$14.81	\$981.90	Y				Y
Rural with Plains WS	\$1,130,000	771	\$1,129.90	\$986.11	\$2,116.01	Y				Y
Rural no current 3W	\$1,130,000		\$0.00	\$136.85	\$136.85					Y



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

90<sup>th</sup> Percentile

90th Percentile	CV	cbm	3W 25/26	Impacts of equalisation	3W Equalised	Metered WS	Unmetered WS	WW	SW Scheme	General rate SW
Edgecumbe	\$640,000	333	\$2,630.04	-\$477.26	\$2,152.78	Y		Y	Y	Y
Ōhope	\$2,045,000	333	\$2,630.96	\$147.48	\$2,778.43	Y		Y	Y	Y
WHK Residential	\$1,070,000	333	\$2,824.35	-\$487.02	\$2,337.33	Y		Y	Y	Y
WHK Commercial	\$2,225,000	333	\$5,069.80	-\$1,334.14	\$3,735.66	Y		Y	Y	Y
Te Mahoe	\$300,000	230	\$2,294.03	-\$515.04	\$1,779.00		Y	Y	Y	Y
Tāneatua	\$442,000	230	\$1,903.02	-\$48.99	\$1,854.04		Y	Y	Y	Y
Murupara	\$235,000	230	\$1,369.80	\$383.88	\$1,753.68		Y	Y	Y	Y
Matatā	\$830,000	230	\$1,613.68	-\$265.26	\$1,348.41		Y		Y	Y
Te Teko	\$275,000	333	\$1,487.06	-\$181.22	\$1,305.84	Y			Y	Y
Rural with Whk WS	\$2,380,000	333	\$1,317.85	\$41.23	\$1,359.08	Y				Y
Rural with Plains WS	\$2,380,000	2,388	\$2,580.03	\$3,033.82	\$5,613.85	Y				Y
Rural no current 3W	\$2,380,000		\$0.00	\$288.22	\$288.22					Y



7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Check against Principles



- Impacts of chosen settings.
- Block charging could be a temporary measure?
- We need to understand why we are doing it.
- Are we being consistent with our principles?
- Block Charging – transition or long term?



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Declining water block charging



## Two proposals

### Version 1

Single step at 2,000 cu. m per year – (captures approx. 291 properties), 25% discount.

### Version 2

Two steps at 730 & 7500 cu. m per year – (captures 745 & 80 properties), 15% and 30% discounts.

Applies to all QV Property categories.



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Declining water block charging



		40/60 Split				20/80 Split		
Unmetered	cbm pa.	25/26 AP	25/26 Equalised	Option 1	Option 2	25/26 Equalised	Option 1	Option 2
WHK +	230	\$1,015.91	\$858.56	\$916.75	\$959.07	\$826.03	\$905.39	\$960.93
Murupara	230	\$846.08	\$858.56	\$916.75	\$959.07	\$826.03	\$905.39	\$960.93
		40/60 Split				20/80 Split		
WHK +	cbm pa.	25/26 AP	25/26 Equalised	Option 1	Option 2	25/26 Equalised	Option 1	Option 2
10th	52	\$490.70	\$489.27	\$502.32	\$511.82	\$333.65	\$351.45	\$363.91
30th	109	\$660.27	\$608.50	\$636.13	\$656.22	\$492.63	\$530.30	\$556.67
50th	157	\$801.00	\$707.45	\$747.17	\$776.05	\$624.55	\$678.72	\$716.63
70th	223	\$996.72	\$845.06	\$901.60	\$942.72	\$808.04	\$885.14	\$939.11
90th	333	\$1,317.85	\$1,070.85	\$1,154.99	\$1,216.18	\$1,109.10	\$1,223.83	\$1,304.15
last	41,867	\$123,594.65	\$87,046.73	\$74,715.97	\$77,084.48	\$115,743.60	\$99,012.27	\$102,094.13
		40/60 Split				20/80 Split		
PLAINS	cbm pa.	25/26 AP	25/26 Equalised	Option 1	Option 2	25/26 Equalised	Option 1	Option 2
10th	96	\$524.03	\$581.01	\$605.28	\$622.93	\$455.97	\$489.07	\$512.23
30th	223	\$637.66	\$843.24	\$899.56	\$940.52	\$805.62	\$882.41	\$936.17
50th	404	\$800.29	\$1,218.54	\$1,320.73	\$1,395.05	\$1,306.02	\$1,445.36	\$1,542.91
70th	771	\$1,129.90	\$1,979.16	\$2,174.32	\$2,299.79	\$2,320.18	\$2,586.30	\$2,750.64
90th	2,388	\$2,580.03	\$5,325.63	\$5,706.68	\$5,718.69	\$6,782.14	\$7,302.56	\$7,315.32
last	93,324	\$84,149.33	\$193,562.47	\$164,662.81	\$167,623.07	\$257,764.58	\$218,546.89	\$222,220.49



# Declining water block charging



An option or options required.

We seek direction.



7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Metering & volumetric water charging journey



## Continues rollout of benefits

- Leak identification and repair.
- Rewards for low volume users.
- Deferral of volume based capex.

Edgecumbe rollout model and learnings to be leveraged.



7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Fixed water component



- Currently about 40% for median ratepayer.
- Councillors have proposed that this might decrease (over time?).
- Volumetric rises accordingly.
- Could transition downwards over time.
- Guidance required.



# Fixed water component



WHAKATĀNE  
District Council  
*Kia Whakatāne au i ahau*

20% or 40% - Pros and Cons:

	40%	20%
Pros	More certainty of revenue for WDC	More strongly incentivises conservation Closer to full user pays Users have greater control of their spend
Cons	Less strongly incentivises conservation	More variable revenue for WDC May lose customers

# Water capacity determines ‘fixed’



WHAKATĀNE  
District Council  
*Kia Whakatāne au i ahau*

Connection dia. (mm)	Count	Rate	Flow rate litres/min
15	5360	\$ 286	30
20	3984	\$ 286	30
25	2094	\$ 286	30
32	88	\$ 731	72
40	70	\$ 1,142	113
50	59	\$ 1,785	177
63	11	\$ 2,833	281
80		\$ 4,569	452
100	13	\$ 7,139	707
125	2	\$ 11,154	1,104
150	5	\$ 16,062	1,590

7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Fixed component based on capacity



An option or options required.  
Direction required.



# Transition purpose



## Purpose

- To reduce the immediate impacts of changes to the amounts of rates to be paid over a short period of time due to either a change in policy or additional costs.



## 7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Transition Principles



- **Must be on specific targeted rates, and not general rates.**  
Note: Water by meter is a targeted rate.  
Can't be ratepayer specific.
- **Must still recover the total budget for the activity.**  
Therefore, some groups of ratepayers will go up while others will go down.
- **Earlier we start the lesser impact.**
- **Ideally should be spread over 3 years but no more than 5 years.**



# Transition plan - Options



Assess at each targeted rate (recommended):

- Wastewater.
- Water supply including plains.
- Stormwater.

Or

Assess at net movement of three rates (not recommended).



7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Consultation/Engagement



- Needs to fully describe a proposal and options.
- Likely to be a mix of themes and specific choices.
- Design consultation collateral.
- Use standard consultation processes.
- Targeted consultation for outliers.



7.6.4 Appendix 4 - Three Waters Rating Review presentation(Cont.)

# Next Steps



- Post workshop fine tuning August 2025
- Report to Committee 28 August 2025
- Engage with new Council & confirm direction Q4/25
- Consultation/engagement Q1 calendar 2026
- Decisions June 2026
- Implementation 1 July 2026

**7.7 Indicative Financial Reporting as at 30 June 2025****7.7 Indicative Financial Reporting as at 30 June 2025**


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To: **Finance and Performance Committee**

Date: **Thursday, 28 August 2025**

Author: **K Farr / Manager Financial Planning and Reporting**

Authoriser: **J McGeough / Acting General Manager Finance**

Reference: **A2948657**

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

To provide the Finance and Performance Committee with the Indicative Financial Reporting to 30 June 2025, the close of the 2025 financial year.

2. Recommendation - *Tohutohu akiaki*

THAT the Indicative Financial Reporting as at 30 June 2025 report be **received** by the Finance and Performance Committee.

3. Background - *He tirohanga whakamuri*

The fourth (final) quarter of the 2025 financial report is presented as a snapshot view of the finances as they stood on the 30 June 2025 and provides insights on any key variances to performance which have been identified. The forecast position, as at Q3 reporting, for the end of the 2025 financial year is also indicated.

At the time of preparing this report the finance team were processing final year end accounting entries in preparation for the finalisation of the Annual Report, which may impact the figures reflected in this report.

The 2025 financial year is the first year of the 2024 – 2034 Long Term Plan (LTP), therefore the budget for this financial reporting is based on year one of the LTP adjusted by carry forward budgets or other revisions as approved by Council (Revised Budget Full Year).

It is important to note that this report follows financial reporting standards when determining what is recognised as revenue and expenditure. For Council this can result in variances that distort financial performance reports. For example, funding that we receive for capital projects is recognised as revenue as the capital projects are delivered. Costs for these projects are capitalised and expensed through depreciation over the life of the asset. As a result, this can mean some years reflect very large surpluses and don't reflect the underlying performance. It can also create large budget variances if the delivery of these capital projects, and therefore revenue, are delayed. Commentary in the report will look to differentiate variances which are caused by capital delays versus those of an operating performance nature.

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)**

It is also important to note, that where operating projects are behind schedule, and especially where the unspent budget is required to be carried forward to complete the project, this can result in variances that portray performance more positively than reality. Commentary in the report will also look to distinguish variances that are impacted by operating project expenditure behind schedule.

**3.1. Financial Performance Summaries**

The key financial KPI indicators are summarised as follows:

- An actual **Surplus of Operating Activities** of \$8.5m is \$5.3m higher than the revised budget surplus of \$3.2m. Payments to staff and suppliers less than budget are the significant drivers of the favourable result.
- The over budget financing costs (\$1.3m) is offset by interest revenue (Other Operating Income) received on prefunded debt at favourable terms.
- An actual **Deficit of Net Capital Expenditure** of \$36.2m is \$14.6m less than revised budget of \$50.8m reflecting timing of capital expenditure and associated funding, with 73% capital delivery compared to budget for the 2025 financial year.
- an actual **Accounting Surplus including Other Activities** of \$220,899m is \$228,507m higher than revised budget deficit of \$(7.6million) with the gain on revaluation of Rooding assets having a significant impact on the overall result.

**4. Discussion – Kōrerorero****4.1. Financial Performance Overview as at 30 June (Q4)**

The financial reporting presented in this paper covers the period to 30 June 2025, the full 2025 financial year. Year-end forecasts as reported at Q3 are also reflected. The information presented depicts financial impacts of Operating and Capital Expenditure at a summary level along with explanations of material variances. The reporting also includes trends for debtors and rates debtors.

## Finance and Performance Committee - AGENDA

## 7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)

Indicative Financial Performance as at 30 June 2025	\$'000				
	Actual YTD	Revised Budget YTD	Variance YTD	Q3 Forecast	Actual vs Q3 Forecast
<b>OPERATIONAL</b>					
Sources of Operating Funding					
Revenue from Rates	70,425	70,044	381	69,983	442
User Fees and Charges	9,311	9,592	(281)	9,097	215
Subsidies and Grants for Operating Purposes	9,986	8,856	1,130	9,082	905
Other Operating Income	5,784	3,971	1,813	5,382	402
<b>Total Sources of Operating Funding</b>	<b>95,506</b>	<b>92,464</b>	<b>3,043</b>	<b>93,543</b>	<b>1,963</b>
Applications of Operating Funding					
Payment to Staff	30,096	31,220	1,124	30,126	30
Payment to Suppliers	47,765	50,163	2,399	47,210	(555)
Financing Costs	9,159	7,906	(1,253)	9,112	(47)
<b>Total Applications of Operating Funding</b>	<b>87,020</b>	<b>89,290</b>	<b>2,269</b>	<b>86,448</b>	<b>(572)</b>
<b>Surplus (Deficit) of Operating Activities</b>	<b>8,486</b>	<b>3,174</b>	<b>5,312</b>	<b>7,095</b>	<b>1,391</b>
<b>CAPITAL</b>					
Sources of Capital Funding					
Subsidies and Grants for Capital Purposes	12,056	14,485	(2,429)	10,254	1,801
Development Contributions	200	1,431	(1,230)	172	29
<b>Total Sources of Capital Funding</b>	<b>12,256</b>	<b>15,915</b>	<b>(3,659)</b>	<b>10,426</b>	<b>1,830</b>
Applications of Capital Funding					
Capital Expenditure	48,431	66,684	18,254	50,281	1,850
<b>Total Applications of Capital Funding</b>	<b>48,431</b>	<b>66,684</b>	<b>18,254</b>	<b>50,281</b>	<b>1,850</b>
<b>Surplus (Deficit) of Net Capital Expenditure</b>	<b>(36,175)</b>	<b>(50,769)</b>	<b>14,594</b>	<b>(39,855)</b>	<b>3,680</b>
<b>OTHER ACTIVITIES</b>					
Non-Operating Activities					
Depreciation	(26,164)	(26,737)	574	(26,423)	260
Gain (Loss) on Revaluation - Derivatives	(3,904)	0	(3,904)	(2,385)	(1,519)
Gain (Loss) on Revaluation - Property, Plant & Equipment	230,028	39,785	229,988	39,785	190,243
Gain (Loss) on Disposal of Assets	197	0	197	0	197
<b>Surplus (Deficit) of Other Activities</b>	<b>200,157</b>	<b>(26,698)</b>	<b>226,854</b>	<b>10,977</b>	<b>189,180</b>
<b>Accounting Surplus (Deficit) including Other Activities*</b>	<b>220,899</b>	<b>(7,608)</b>	<b>228,507</b>	<b>28,498</b>	<b>192,401</b>

\* Accounting Surplus (Deficit) line excludes Capital Expenditure

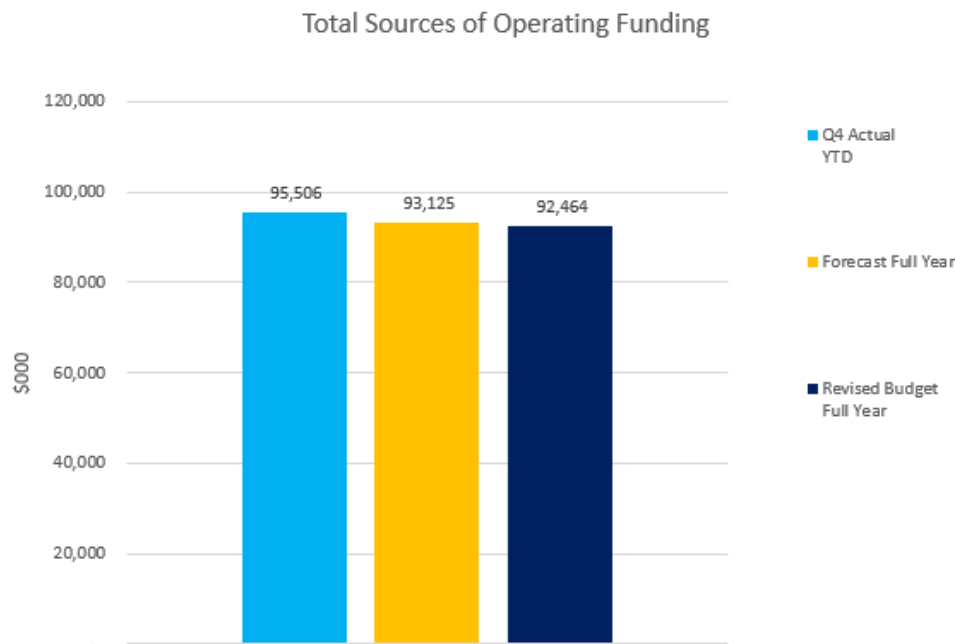
## 4.2. Operating Performance

The surplus for operating activities of \$8.5m is \$3.2m higher than the budgeted operating surplus of \$5.3m.

- Actual Operating Revenue (Sources of Operating Funding) of \$95.5m is within range of \$92.5m budget overall (3%).
- Actual Operating Expenditure (Applications of Operating Funding) of \$87m is \$2.3m (3%) less than budget of \$89.3m

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)****4.3. Operating Revenue**

Operating Revenue (Sources of Operating Funding) is within range of budget overall at the end of the financial year; actual of \$95.5m aligns with budget of \$92.5m.



User Fees and Charges align with budget overall at the end of June, reflecting a 3% underbudget position.

Although aligning with budget overall there are some significant variances within activities as reported during the year:

- Building Inspection less than budget by \$418k (22%) reflecting less building activity.
- Parking Enforcement less than budget by \$88k (63%) owing to challenges balancing staff resource between bylaws and parking enforcement during the year. The time allocation has now been rebalanced.
- Holiday Park less than budget by \$173k (15%), reflecting the current economic climate
- Waste Management activity fees higher than budget of \$176k (8%), reflecting higher volumes of waste at Resource Recovery centres.

Subsidies and Grants for Operating Purposes are higher than budget by \$1.1m (13%).

Contributing to this over budget variance are:

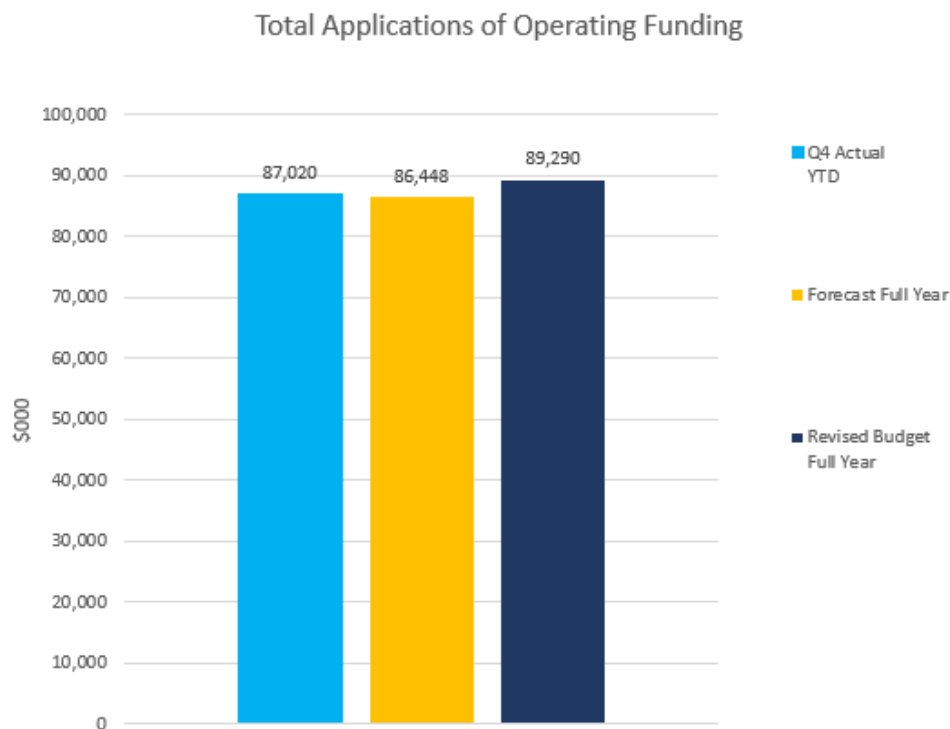
- Unbudgeted subsidies from DIA to fund Local Water Done Well expenditure (\$290k)
- Unbudgeted subsidy received from Opotiki, Kawerau and Regional Councils to fund the Spatial Plan (\$350k)
- Higher than budget waste levy received (\$277k), due to the waste levy (paid back by central government to all councils) being higher than originally anticipated
- Higher than budget NZTA subsidy received for operational projects (\$346k) due to increased spend in pavement maintenance

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)**

Other Operating Income is higher than budget by \$1.8m (46%); this variance predominantly relates to the receipt of interest revenue of \$1.6m and offsets the over budget financing costs.

**4.4. Operating Expenditure**

Operating Expenditure (Applications of Operating Funding) of \$87 is \$2.3m (3%) lower than budget of \$89.3m.



Payments to Staff at \$30.1m is \$1.1m (4%) less than budget of \$31.2m at the end of June predominantly reflecting vacancies during the year. This variance was forecast in Q3 reporting.

Payment to Suppliers is less than budget by \$2.4m (5%) expenditure. The forecasts anticipated an under-budget position of 6%. Variances by Group of Activity are reflected in the following table:

## Finance and Performance Committee - AGENDA

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)**

Payment to Suppliers by Group of Activity as at 30 June 2025	Actual YTD \$000	Budget YTD \$000	Variance YTD \$000	Variance YTD %	Forecast Q3 \$000	Actual vs Q3 Forecast	Variance Comment (</> 5%)
AQUATIC CENTRES	1,002	1,083	81	7%	893	109	Electricity significantly under budget \$149k offset with some minor overbudget expenditure in other line items. The electricity budget has been reduced in 2026 AP.
ARTS AND CULTURE	402	326	(75)	(23%)	322	80	Over budget expenditure predominantly related to reclassification of BOF expenditure from capex to opex \$16k (100% subsidy funded) and subscription costs over budget
BUILDING AND RESOURCE MANAGEMENT	1,905	2,398	494	21%	2,042	(137)	Predominantly project timing in the Policy Planning activity including Landslide District Plan change and Coastal Hazards Review projects, which are proposed to be carried forward
CCO - AIRPORTS	701	828	126	15%	715	(14)	Underspend predominantly relates to the Airport Masterplan and Airport Development Feasibility projects behind schedule
CLIMATE CHANGE AND RESILIENCE	105	51	(55)	(109%)	76	30	Overspend mainly relates to BOF project and is offset by subsidy
COMMUNITY FACILITIES	1,118	1,143	25	2%	1,029	88	
COMMUNITY REGULATION	264	363	99	27%	262	2	Various underbudget line items across all activities including advertising and contracts costs for disposal of hazardous materials
CORPORATE SERVICES	9,272	10,999	1,727	16%	8,400	872	Underbudget expenditure predominantly relates to ERP project timing \$1.86m (balance to be carried forward), insurance less than budget \$130k. Insurance budget has been adjusted in 2026 Draft Annual Plan
DEMOCRACY	1,473	1,555	82	5%	1,484	(11)	Annual Partnership Facilitation Fund \$50k not utilised in 2025
DISTRICT PARTNERSHIPS	1,454	2,209	755	34%	1,660	(206)	Predominantly project timing. Better Off Funded Collective Iwi Hub \$280k and Reorua Project \$98k less than budget, these balances are anticipated to be carried forward to 2026. Road Safety expenditure less than budget \$150k owing to reduced NZTA subsidies, expenditure was reduced accordingly to match.
ECONOMIC DEVELOPMENT	1,156	1,484	328	22%	1,577	(421)	Property Disposal Strategy \$170k (budget for this project was omitted from LTP in error, and is funded by the Asset Divestment Reserve)
EVENTS AND TOURISM	864	1,269	405	32%	918	(54)	Predominantly project timing: MBIE Tourism Recovery (\$301k) & Cycleway Planning and Implementation (\$21k) projects which are anticipated to be carried forward
HOLIDAY PARK	403	354	(50)	(14%)	389	14	Over and under expenditure in a number of line items, rentals for temporary cabins was unbudgeted (\$78k)
OTHER	187	712	525	74%	719	(532)	Budgeted bad debts in LTP less than budget
PARKS AND RESERVES	2,208	1,501	(707)	(47%)	1,896	312	The Valley Road Tree Harvest cost escalations and desilting at Matatā Lagoon are the main drivers of this over budget expenditure
PORTS AND HARBOURS	1,434	1,061	(373)	(35%)	1,040	394	The over budget expenditure relates to the write off of work in progress (\$440k) relating to the Te Aro Hau projects which are no longer progressing and Harbour and Boat Harbour costs (\$118k) offset slightly by maintenance costs under budget. There is no funding implication from the write off as the projects were funded in prior years.
STORMWATER	2,383	1,749	(634)	(36%)	2,228	155	Additional Costs associated with Local Waters Done Well and Rates Review \$350k, offset with \$290k DiA funding to offset LWDW costs
TRANSPORTATION CONNECTIONS	7,012	7,397	385	5%	7,870	(858)	
WASTE MANAGEMENT	9,540	9,695	155	2%	9,215	325	Contract costs for operations are \$1.8m under budget at year end overall (contract costs have been adjusted in 2026 Draft Annual Plan), this excludes the additional costs associated with closed landfills (\$1.5m) for which there is no associated rating impact.
WASTEWATER	1,456	1,300	(156)	(12%)	1,398	58	Predominantly related to maintenance on the access road at Ōhope Wastewater Treatment Plant
WATER SUPPLY	3,428	2,687	(740)	(28%)	2,934	493	Water connections (largely recovered by fees), installation of media filter at Braemar to filter arsenic and compliance costs for Murupara Water are the main drivers of this over budget expenditure
<b>Total Payment to Suppliers</b>	<b>47,765</b>	<b>50,163</b>	<b>2,398</b>	<b>5%</b>	<b>47,064</b>	<b>701</b>	

Financing Costs are higher than budget (\$1.25m), owing to slightly higher debt levels than forecast, some of which were the prefunding loans that fell due in April 2025. This led to interest revenue (\$1.6m) associated with prefunding at favourable rates which offsets the additional expense.

**4.5. Capital****4.5.1. Sources of Capital Funding are \$12.3m which is \$3.6m less than budget of \$15.9m.**

Capital Subsidies are under budget (\$2.4m), predominantly reflected in the Transport Connections activities (\$1.3m), with the variance relating to the timing of projects and the reduction of approved NZTA subsidies compared with LTP budget. Timing of Better Off Funded projects, where the projects are behind schedule, also contributes to the underbudget position (\$1.2m). These projects include Southern District Regeneration, Enhancing Resilience for Waiewe Street works, and Edgumbe to Thornton Cycleway projects.

Development Contributions are under budget \$1.2m, this variance was forecast in Q3 reporting. A significant portion of the variance relates to revenue budgeted for the Rex Morpeth project (\$0.7m). The policy has development contributions being collected once the project commences. We are currently not collecting any revenue for this project, waiting for certainty in the next LTP, however the budget was not adjusted noting this delay. The development contribution revenue will coincide with Stage 2 of the project when the decision will be made whether to proceed. On this basis the revenue has been removed from the 2026 Annual Plan.

## Finance and Performance Committee - AGENDA

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)**

Development Contribution revenue is transferred to reserves to fund growth related projects, with any shortfall over time meaning there will be less funding available to fund projects.

**4.5.2. Applications of Capital Funding**

Applications of Capital Funding are \$48.4m which is \$18.3m (27%) less than budget of \$66.7m.

Variance by Group of Activity is reflected in the table below:

Capital Expenditure by Group of Activity	Actual June YTD \$000	Revised Budget June YTD \$000	Variance June YTD \$000	Forecast Q3 \$000	Year End Actual vs Q3 Forecast \$000	Commentary
AQUATIC CENTRES	629	993	364	522	107	Timing of renewals expenditure, anticipate carryforward for completion
ARTS AND CULTURE	341	446	105	359	(18)	Better Off Funded Hono Hapori Community Outreach project completed under budget \$89k, DIA approval has been sought to apply to offset remaining subsidy with LWDW expenditure
CCO - AIRPORTS	282	1,377	1,095	705	(424)	Timing; Runway Lighting Navigational Upgrade, anticipate carry forward for completion
CLIMATE CHANGE AND RESILIENCE	145	463	318	240	(94)	Underspend relates to Better Off Funded (BOF) Community Enhancement and Resilience project, the remaining budget has been reallocated to Waieue Hall upgrade and will be requested to be carried forward
COMMUNITY FACILITIES	1,029	2,144	1,115	1,467	(438)	Timing; Rex Morpeth Preliminary Works (\$750k), BOF Resilience project for Waieue Hall upgrade (\$324k). It is anticipated that these project budgets will be carried forward to 2026
COMMUNITY REGULATION	13	48	34	13	-	Edgecumbe Stockyards project completed underbudget
CORPORATE SERVICES	1,654	2,915	1,261	2,037	(384)	Underspend on fleet replacements \$88k, Museum and Library HVAC upgrades not complete \$520k (timing), budgets for HVAC upgrades will be requested to be carried forward
DISTRICT PARTNERSHIPS	-	42	42	-	-	
ECONOMIC DEVELOPMENT	561	1,520	959	259	302	Timing; Floodwall Integration project anticipate carry forward
EVENTS AND TOURISM	21	-	(21)	17	4	
HOLIDAY PARK	80	360	280	240	(159)	Timing of Ablution upgrades, anticipate carry forward to complete project
PARKS AND RESERVES	1,053	3,502	2,449	1,140	(88)	Timing; various projects across portfolio for which carry forward budget requests are anticipated including BOF Southern District Regeneration projects (\$350k), Awatapu Lagoon Wetland Construction (\$450k), Mitchell Park Drainage and Landscaping (\$151k), Whakatane & Taneatua Cemetery Expansion (\$650k)
PORTS AND HARBOURS	826	1,144	317	744	82	Timing; Wharfside Landscaping & Buildings
STORMWATER	6,311	7,200	889	6,871	(561)	Timing; Pump Replacements
TRANSPORTATION CONNECTIONS	15,411	17,878	2,467	14,019	1,391	Various predominantly related to reduction in NZTA subsidy
WASTE MANAGEMENT	209	240	30	298	(89)	
WASTEWATER	10,508	7,121	(3,387)	10,267	241	Timing; overspend predominantly relates to purchase of land for Matatā WW project
WATER SUPPLY	9,357	19,293	9,936	11,081	(1,724)	Timing; Otumahi Water Storage, Murupara Treatment Upgrades, Plains Backflow Preventors, Rōātōki Water Treatment
<b>Total Capital Expenditure</b>	<b>48,431</b>	<b>66,684</b>	<b>18,254</b>	<b>50,281</b>	<b>(1,850)</b>	

**4.5.3. Depreciation and Non-Operational Activities.**

Depreciation: Depreciation of \$26.2m is within range of budget (2%) at the close of the financial year.

Gain/Loss on Derivatives: An overall loss on derivatives of \$3.9m is reported to the end of June.

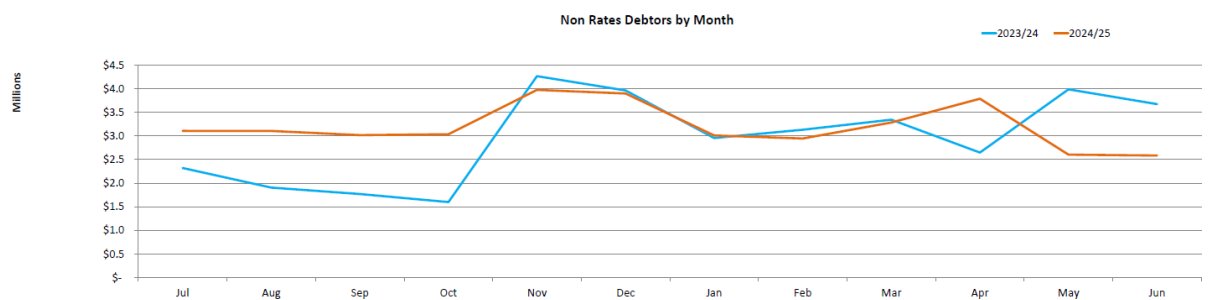
Gain/Loss on Revaluation: a gain of \$230k for Property, Plant and Equipment under Comprehensive Revenue and Expenditure is predominantly owing to a full revaluation of Roading assets.

## Finance and Performance Committee - AGENDA

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)****5. Non-Rates Debtors as at 30 June 2025**

Sundry Accounts Receivable (non-rates) as at 30 June 2025						
Activity	Current	Overdue 30 days	Overdue 60 days	Overdue 90+ days	Total June 2025	Total June 2024
Airport	(715.45)	1,813.55	565.80	1,631,364.25	1,633,028.15	1,591,330.62
Animals	-	-	-	7,626.75	7,626.75	10,255.95
Building Consents	50,368.72	19,881.12	6,055.57	17,499.90	93,805.31	127,006.78
Refuse Transfer Station	83,300.65	5,100.35	5,545.57	54,752.98	148,699.55	275,918.91
Halls	8,055.63	694.50	-	304.01	9,054.14	23,311.30
Harbour Ground Lease	121,621.93	(23,085.87)	4,953.56	(139.15)	103,350.47	738,064.93
Leases/Rental (non Harbour)	22,779.44	8,385.56	8,644.23	(6,211.41)	33,597.82	84,273.86
Licences	28,439.15	2,807.50	2,691.25	5,541.48	39,479.38	45,210.74
Resource Consents	32,138.91	6,615.24	2,529.00	211,901.79	253,184.94	229,817.11
Roading	15,224.29	1,765.94	1,300.95	25,462.49	43,753.67	80,106.28
Sundry debtors	19,287.26	356.25	2,375.79	2,633.72	24,653.02	265,655.61
Trade Waste	37,907.95	1,631.96	15,823.16	28,051.79	83,414.86	78,666.89
Aquatic Centre	11,677.38	45.25	(1,935.00)	(637.75)	9,149.88	17,920.13
Moorings/Hardstand/Berthage	44,624.79	-	11,499.23	(63.48)	56,060.54	53,855.19
Liquor Licensing	1,359.93	-	604.43	160.99	2,125.35	1,861.40
Cemetery	40,085.13	3,155.00	1,850.00	(79.57)	45,010.56	53,090.43
<b>Total</b>	<b>516,155.71</b>	<b>29,166.35</b>	<b>62,503.54</b>	<b>1,978,168.79</b>	<b>2,585,994.39</b>	<b>3,676,346.13</b>
	20%	1%	2%	76%	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, water connection fees and venue hire).

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

Total debt for June 2025 has decreased by \$1.09 million compared with June 2024 (2025: \$2.58M; 2024: \$3.67M). The main reason for this is the timing of payments for Harbour Leases.

- 90-day debt for June 2025 has reduced by \$47K compared with the same period last year. Debt for most activities have decreased, except the Airport which is showing an increase in 90-day debt. This is for new invoices to the Ministry of Transport for their share of the Airport's project costs.

**6. Total Land Rates Debt**

The total land rates debt as at 30 June 2025 is \$8.71 million (30 June 2024: \$8.21 million).

The percentage of invoiced rates collected for the 2025 financial year as at 31 March 2025 is 96.7%, this compares to 96.8% collection at the same time last year.

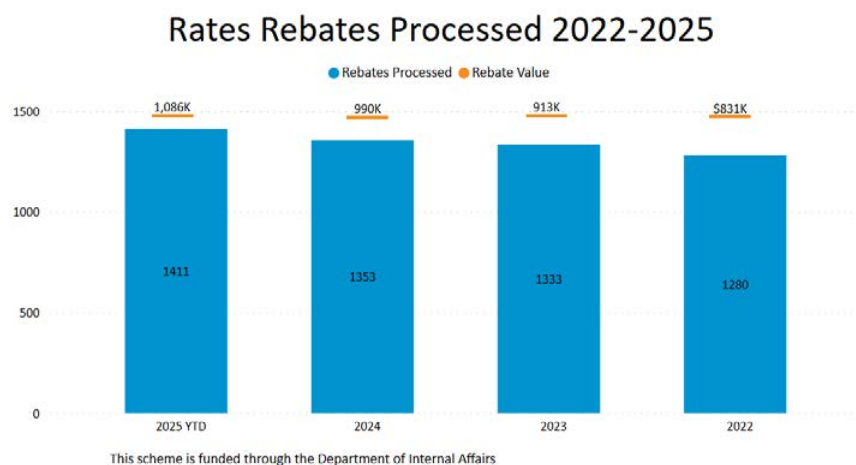
The percentage of quarterly rates invoicing collected at the reporting date is shown in the following table:

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)**

Percentage Collected	2025	2024	2023
Q1 as at 30 September	91.59%	94.76%	95.74%
Q2 as at 31 December	95.63%	96.05%	96.48%
Q3 as at 31 March	96.17%	96.57%	96.86%
Q4 as at 30 June	96.70%	96.80%	97.23%

**6.0.1. Rates Rebates**

Rates rebates processed to the end of June has increased 4.3% (1,411) in comparison to last year (1,353) at this point. The Rates team have continued to encourage low-income ratepayers to submit applications to check if they qualify for the rebate of up to \$790. Reminders were sent with application forms for all customers who claimed last year but not so far this year in their final rates instalment of the financial year. There was also a social media and Ko Konei push to advertise this as well as some to the team attending local markets to raise awareness of this DIA funded scheme.

 **Rates Rebates, Email opt-ins and Direct Debits**
**7. Options Analysis - Ngā Kōwhiringa**

There are no options as this is an information report.

**8. Significance and Engagement Assessment - Aromatawai Pāhekoheko****8.1. 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.

**7.7 Indicative Financial Reporting as at 30 June 2025(Cont.)****8.2. Engagement and Community Views**

Engagement on this matter is not being undertaken in accordance with Section 6.0 of the Council's Significance and Engagement Policy. This states that the Council will not consult when the matter is not of a nature or significance that requires public engagement (low significance).

**9. Considerations - *Whai Whakaaro*****9.1. Strategic Alignment**

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

**9.2. Financial/Budget Considerations**

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

**9.3. Climate Change Assessment**

There are no significant or notable impacts associated with the matters of this report.

**9.4. Risks**

There are no significant or notable risks associated with the matters of this report.

**Attached to this Report:**

- There are no appendices attached to this report.

**7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)****7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)**To: **Finance & Performance Committee**Date: **Thursday 28 August 2025**Author: **E Rampling / Systems Accountant**Authoriser: **S Perdia / Chief Executive**Reference: **A2949367****1. Reason for the report - *Te Take mō tēnei rīpoata***

The purpose of this report is to seek endorsement from the Finance & Performance Committee for the carry forward of unspent capital and operating expenditure budgets from the 2024/25 financial year.

These carry forwards are proposed for inclusion in Year 2 of the Long Term Plan, forming the basis of a Revised Budget for performance monitoring in 2025/26.

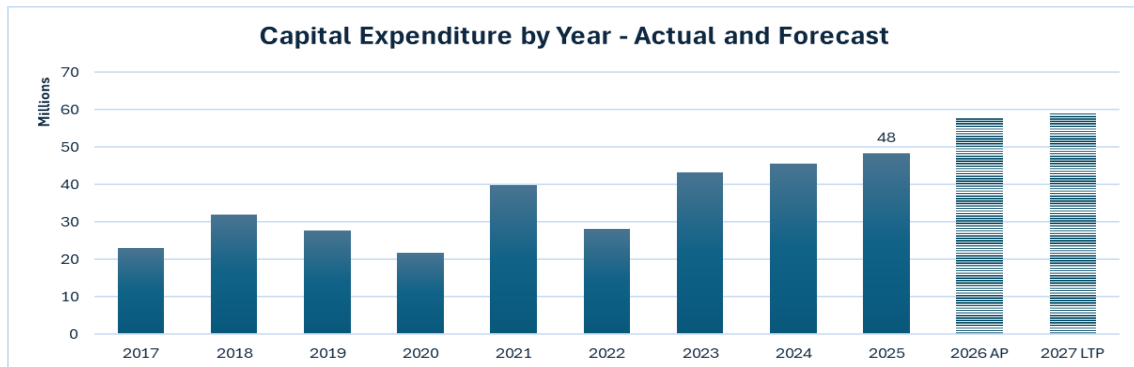
Subject to Committee endorsement, the proposed carry forwards will be presented to Council for formal approval at its meeting scheduled for 2 October 2025.

**2. Recommendation/Actions - *Tohutohu akiaki***

1. THAT the Committee recommends that Council **approve** the carry forward of unspent capital expenditure budgets related to major projects into the 2025/26 financial year, totalling \$16,547,210; and
2. THAT the Committee recommends that Council **approves** the carry forward of unspent operational project budgets into the 2025/26 financial year totalling \$737,354 funded from external sources; and
3. THAT the Committee recommends that Council **approves** the carry forward of unspent capital expenditure budgets of \$179,681 associated with the CCO Whakatāne Airport into the 2024/25 financial year (Appendix 1); and
4. THAT the Committee recommends that Council **approves** adjustments and deferrals to the 2025/26 financial year, providing a reduction to the Annual Plan totalling \$6,875,616.

**3. Background - *He tirohanga whakamuri***

The 2025 financial year marked a significant milestone for Council, with the largest capital expenditure delivery in its history - totalling \$48.4 million.

**7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)(Cont.)**

The capital programme for 2024/25 (including carry forwards) was set at \$66.7 million; this target proved to be overly ambitious even though the largest capital spend by Council was achieved.

As part of the 2024/25 year-end process, budget managers and the Executive have reviewed both capital and operational projects that remain unfinished. To ensure funding remains available for approved projects, it is standard practice to seek Council approval to carry forward unspent budgets into the following year to allow for their completion. Better Off Funding totalling \$1.563 million is included within capital and operational budget carry forward requests.

The proposed capital carry forwards into the 2025/26 financial year are \$16.5 million. There are three large waters related projects that are progressing slower than expected (Rūātoki, Murupara and Otumahi) that represent just under 30%. The rest of the list is reflective of projects that are already contracted, committed or planned, using the three-year movable work programme framework recognising that it is not always feasible to complete a capital project within a single financial year.

Operational budgets are proposed for carry forward on an exception basis; the Executive position is that only those projects for which external funding has been provided can be carried forward. The proposed operational carry forward into 2025/26 is \$737,354.

Finally, the Airport has a \$179,681 capex carry forward request.

Looking ahead, the Executive will maintain close oversight of capital expenditure given the level of carry forward onto an already high level of capital delivery for this financial year. As part of the 2026/27 Annual Planning process staff will be reviewing this year's capital programme, the feasibility of delivery and the flow on effect into the next financial year. The Executive will also establish a Capital Expenditure Management Group to maintain much closer oversight of capital project planning, procurement and implementation progress.

The 2025/26 Annual Plan currently includes just under \$58 million in capital projects excluding carry forwards, and 2026/27 is currently forecast at \$59 million.

#### 4. Issue/subject – Kaupapa

##### 4.1. Capital Expenditure Projects

The table below outlines the requested capital expenditure projects and values to carry forward to the 2025/26 financial year.

**7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)(Cont.)**

Group Of Activities	Carry Forward Request 2024-25	2026 Annual Plan	Adjustments 2026 AP	Revised Budget 2026
AQUATIC CENTRES Total	341,181	626,069	-	967,250
ARTS AND CULTURE Total	76,082	247,138	-	323,220
COMMUNITY FACILITIES Total	1,144,297	2,528,397	-	3,672,695
HOLIDAY PARK Total	279,975	106,294	-	386,269
PARKS AND RESERVES Total	1,868,155	4,398,366	-	6,266,521
CCO - AIRPORTS Total	179,681	564,635	-	744,316
WASTE MANAGEMENT Total	-	49,315	-	49,315
PORTS AND HARBOURS Total	492,829	297,553	-	790,382
CORPORATE SERVICES Total	1,088,600	1,874,378	- 265,051	2,697,927
CLIMATE CHANGE AND RESILIENCE Total	40,164	-	-	40,164
DISTRICT PARTNERSHIPS Total	-	-	-	-
ECONOMIC DEVELOPMENT Total	1,024,567	5,080,477	-	6,105,044
EVENTS AND TOURISM Total	-	525,825	-	525,825
COMMUNITY REGULATION Total	-	-	-	-
STORMWATER Total	857,293	2,038,383	-	2,895,676
TRANSPORTATION CONNECTIONS Total	930,009	16,661,991	- 1,637,926	15,954,075
WASTEWATER Total	313,382	12,308,232	- 4,972,639	7,648,975
WATER SUPPLY Total	7,910,994	10,632,486	-	18,543,481
<b>Grand Total</b>	<b>16,547,210</b>	<b>57,939,541</b>	<b>- 6,875,616</b>	<b>67,611,135</b>

**4.2. Table 1 - Capital carry forwards and adjustments by group of activities.**

The total 2025 delivery of capital (\$48.4 million) against the revised budget (\$66.7 million) which increased with carry forwards from the previous year, has presented a carry forward position of 25% \$16.5 million which will increase the revised Annual Plan budget to \$67.6 million. It is likely that this is unachievable. The advice from the Executive is that Councils capacity for capital delivery is more like \$45-50million.

This year the Executive Team will be working closely with Managers to review the capital programme aiming for a \$20million reduction (down to about \$50million) that is rephased into the next financial year. This is in parallel with the Annual Planning process for the 2026/27 financial year so that Council can assess the impact of rephasing budgets from this year into the 2026/27 financial year.

Additional to this the Executive Team will establish a Capital Expenditure Management Group to complement the internal Procurement Panel. The group will meet regularly to monitor the capital projects list, procurement and implementation progress and provide better forecasting on completions and carry-over risk.

**4.3. Operational Expenditure Projects to carry forward into 2025/26**

The Executive Team has declined operational expenditure carry forwards unless they are linked to third party subsidies including Better Off Funding. The below table outlines the full list of carry forwards requested from budget managers and the requests recommended by the Executive Team. The total amount recommended for carry forward into 2025/26 is \$737,354.

**7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)(Cont.)****Table 2 – Opex carry forward by project**

Project #	Project Name	Recommended Carry Forward		Funding
		Yes	No	
E20003	Tourism Development Fund (MBIE)	326,494		100% Subsidy
Y50050	BOF (Southern Districts Regeneration	129,384		100% Subsidy
Y50052	BOF (Southern Districts Regeneration	14,490		100% Subsidy
L10501	BOF Collective Iwi Policy Hub	266,986		100% Subsidy
R10103	Airport Development Feasibility		43,448	100% Loan
E13046	Proactive Property Development		218,652	100% Loan
E13054	Town Vision Update		100,000	100% Loan
E30004	Cycleway Planning & Implementation		21,115	100% Loan
Y50043	Landslide District Plan Change		195,930	100% Loan
Y50044	Coastal Hazards Review		105,574	100% Loan
Y50045	Minimum Floor Level Consenting		10,000	100% Loan
A20016	Arts Strategy & Implementation		105,528	100% Loan
L10511	ReoRua Policy & Implementation		98,500	100% Loan
	<b>Total</b>	<b>737,354</b>	<b>898,747</b>	

**Further details on requested carry forwards**

E20003 – Tourism Development Fund (MBIE)

2025 carry forward: \$326,494

Externally funded by MBIE. Projects are underway, and the remaining budget is carried forward to support other initiatives. There are lease conditions for the Creative Arts Hub requiring works to be completed and we can use part of the Tourism Development Fund (MBIE) for the alarm installation, roller door and some minor lino and asbestos removal.

Y50050 – Southern Districts Regeneration – Murupara (Better Off Funding)

2025 carry forward: \$129,384

Part of the Better Off Funding (BOF) programme. Work is ongoing.

Y50052 – Southern Districts Regeneration – Minginui (Better Off Funding)

2025 carry forward: \$14,490

Strong progress with most of the budget spent. Remaining funds are minimal, project near completion.

L10501 – Collective Iwi Policy Hub (Better Off Funding)

2025 carry forward: \$266,986

**7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)(Cont.)**

Substantial progress made on this Better Off Funding initiative. Remaining funds will support the continuation and completion of the policy hub.

**4.4. Whakatāne Airport**

As a CCO, Whakatāne Airport is not directly included in the Council's performance measurement framework and is subject to appropriate delegations and approval frameworks agreed with its joint venture partner, the Ministry of Transport. Though not specifically included in the performance measurement, it is incorporated in internal financial processes. It is proposed to carry forward capex budgets of \$179,681 which is also presented in this report (Appendix 1) for endorsement from the Committee.

**4.5. Summary of other adjustments and deferrals – Total \$6,875 million**

\$225,000 for "Solar Building" projects, approved budget excluding expenditure incurred in the 2025 financial year, will be included in 2026 budget. This was approved by the Council on 8 May 2025.

A small number of projects in transportation and wastewater activities progressed ahead of schedule, incurring expenditure earlier than planned in 2025; this has resulted in decreases to budget for 2026.

A review of multi-year waters projects against progress to date has resulted in a number of budgets being rephased in 2026. These adjustments result in a corresponding reduction of \$7.1 million to the 2025/26 capital budget.

Increased subsidy (\$1.65 million) from NZTA for the Rewatu Road under slip and Tāneatua Road flood resilience projects has reduced the budgeted financial contribution required from the Council. This adjustment will be reflected in the budget as an increase in subsidy revenue and decrease to loan, with no impact on overall project budget cost.

**5. Options analysis - *Ngā Kōwhiringa*****Option 1: Approve carry forwards and amendments (Recommended)**

The Committee endorses the full carry forward list from 2024/25 into the 2025/26 financial year as outlined in Table 1, and the reduced operational expenditure list as outlined in Table 2.

This option ensures continuity and adequate funding to complete scheduled projects which have been planned, committed to and/or started.

Council should note that the Executive Team will review this year's capital programme in parallel with the Annual Plan process for 2026/27 with the aim of setting realistic capital work programmes for this year and next year.

Advantages	Disadvantages
Keeps momentum going with the existing and approved work programme.	Risk around under delivery versus revised budget.

**7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)(Cont.)****Option 2: Selective carry forward**

The Committee endorses a limited list of selected projects or by Group of Activity for carry forward.

The Executive Team will still review this year's capital programme in parallel with the Annual Plan process for 2026/27 with the aim of setting realistic capital work programmes for this year and next year.

Advantages	Disadvantages
A lower carry forward position which is potentially a more achievable target versus budget for Council.	<p>There will be a delay if Council requires further workshop briefings to review projects and Groups of Activities.</p> <p>This option may lead to costs from terminating existing commitments.</p> <p>The additional work for staff to represent business cases for projects and funding for work that is still required.</p> <p>There could potentially be sunk costs that will be lost if projects are stopped.</p>

**Option 3: Decline all carry forwards**

The Committee declines all capital, operational and airport carry forward requests.

This option will require further work from staff to review all projects that are impacted and outline the effects and risks. It is likely that this option will also require consultation and engagement as there is a change to the Long Term Plan and an impact to levels of service to the community.

The Executive Team will still review this year's capital programme in parallel with the Annual Plan process for 2026/27 with the aim of outlining the impacts on the capital works programme of this decision and setting a realistic capital work programmes for this year and the following year.

Advantages	Disadvantages
There is no carry forward so potentially lower risk of achieving budgeted targets for Council.	<p>This option may lead to costs from terminating existing commitments.</p> <p>There will be additional work for staff to identify which projects will not proceed, and the impact on levels of service</p> <p>This option will require consultation which has not been planned or budgeted for.</p>

**7.8 Capital and Operating budgets proposed to carry forward to 2026 (LTP2034 Year 2)(Cont.)**

Advantages	Disadvantages
	<p>There will be additional work to repeat business case and decision-making processes to fund projects that have been stopped.</p> <p>There could potentially be sunk costs that will be lost if projects are stopped.</p>

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

The proposed carry forwards represent a continuation of existing work programmes and commitments already approved through previous Annual Plan and Long Term Plan processes. They do not introduce new activities, levels of service, or material changes to Council's direction. On this basis, the matters are assessed to be of low significance under the Council's Significance and Engagement Policy.

While the financial quantum of capital projects carried forward is considerable, the projects are already contracted or committed, and their delivery is anticipated by both stakeholders and the community. Endorsing the carry forwards maintains delivery momentum and ensures alignment with community expectations set through prior consultation.

However, Council should note that it is expected that the review of this year's capital programme and the impact of rephasing on the Annual Plan process could be of significance to the community.

**6.2. Engagement and community views**

Given the low significance, specific community engagement is not required to inform decision-making on this report.

The underlying projects and budgets have already been through appropriate consultation processes via the Long Term Plan or Annual Plan. Community expectations are therefore already established, and approving the carry forwards simply ensures that delivery keeps pace with commitments.

The approach also balances the Council's strategic priorities of prudent financial management, transparency, and continuity of service delivery, while avoiding consultation fatigue on matters already consulted upon.

However, it is likely that the next Annual Plan process will require engagement if there is rephasing of the capital programme.

**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.

**7.8.1 Appendix 1 – CCO Whakatāne Airport carry forward to 2025/26****7.2. Strategic alignment**

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

**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.

The Council faces reputational risk from underperformance in delivering capital and operational work programmes relative to the approved budgets.

If staff numbers decrease in areas that implement or support the capital works programme then it may further delay project progress.

**Attached to this report:**

- Appendix 1 – CCO Whakatāne Airport carry forward to 2025/26

**7.8.1 Appendix 1 – CCO Whakatāne Airport carry forward to 2025/26**

**7.8.1 Appendix 1 – CCO Whakatāne Airport carry forward to 2025/26(Cont.)**

## Appendix 1 – CCO Whakatāne Airport Carry Forward to 2025/26

<b>Capex</b>							
<b>Project</b>	<b>Funding</b>	<b>Actual 2025</b>	<b>Rev Budget 2025</b>	<b>Var 2025</b>	<b>Carry Forward Request</b>	<b>2026 AP</b>	<b>Revised Budget 26</b>
R11102 - Runway Lighting Nav Upgrade	25% Loan 25% Opex Res 50% MOT	60,155	348,130	287,974	50,000	-	50,000
R11127 - Runway Renewals	50% MOT 50% Renewal	40,942	136,374	95,432	95,432	18,185	113,617
R11138 - Replacement of Windsock Structure	25% Loan 25% Opex Res 50% MOT	1,092	53,405	52,313	-	-	-
R11140 - Airport Land Redevelopment	100% Loan	98,038	694,725	596,687	-	486,775	486,775
R11141 - Airport Hardstand Upgrade	50% Loan 50% MOT	2,016	36,265	34,249	34,249	-	34,249
R11142 - Airport Fencing Renewals	50% Renewal 50% MOT	19,566	53,405	33,839	-	53,045	53,045
R11143 - Airport CCTV Upgrade	50% Loan 50% MOT	0	47,531	47,531	-	-	-
R11145 - Terminal Renewals	50% MOT 50% Renewal	59,928	6,676	-53,253	-	6,631	6,631
<b>Total</b>		<b>281,739</b>	<b>1,376,510</b>	<b>1,094,771</b>	<b>179,681</b>	<b>564,635</b>	<b>744,316</b>