



Feedback must be received by 4pm Friday 12 May 2017.

Please read the consultation document before providing your feedback.

EMAIL: ap@swdc.govt.nz

IN PERSON: Drop form to your local library or the Council Office in Martinborough

BY POST: Fold and affix a stamp

FAX: (06) 306 9373

ONLINE: http://www.swdc.govt.nz/council-projects-and-open-consultations

Your name and feedback will be public documents.

All other personal details will remain private.

Ratepayer:

- Urban Rural
- Commercial Non Ratepayer
- Yes I/We would like to speak to our submission

Speaking Preference:

- May 31 am May 31 pm

FIRST NAME: Ro

LAST NAME: GRIFFITHS

ORGANISATION: _____

(Only if authorised to suit)

EMAIL ADDRESS: _____

POSTAL ADDRESS: _____

PHONE: _____

Consultation Questions

Wastewater

Do you support continuing to defer the cyclical wastewater underground pipe asset replacement programme to accelerate stage one and two of irrigation to land for Martinborough, Greytown and Featherston?

- Yes No

If not, why?

Swimming Pools

Do you support providing free swimming in the three District Council owned pools?

- Yes No

If not, why?

Fees and Charges

Please provide your feedback on the proposed fees and charges for 2017/18.

OK with new fees

If you would like to comment or propose something different now is your chance. (Continue on another sheet if required)

Dog pound at Featherston

Do you support the building of a new dog pound in Featherston?

- Yes No

If not, why?

N/A

Roading

Do you support deferring some roading rehabilitation for one year and redirecting funds to new footpaths, footpath maintenance and road crossings?

- Yes No

If not, why?

Would like to see Shooting Butts Road sealed to the corner. Many many people drive, bike and walk that stretch.

Submission to the South Wairarapa District Council 2017/18 Annual Plan and the Draft Wellington Regional Waste Management and Minimisation Plan

Name of submitter Enviroschools Te Upoko o Te Ika a Māui
 Contact person Dana Carter
 Postal address PO Box 11646, Manners St, Wellington 6142
 Contact phone number 021 526 053
 Email address dana.carter@gw.govt.nz



We wish to speak in support of our submission.

Introduction

1. Enviroschools is a nationwide programme that supports children and young people to plan, design and implement sustainability actions that are important to them and their communities. The programme is thriving in South Wairarapa and is contributing to the South Wairarapa District Council's priorities to build community partnerships, and provide the best care and use of our natural resources, assets and infrastructure, and the Regional Waste Management and Minimisation Plan among other strategic goals.
2. Independent research¹ shows that the Enviroschools programme results in the following outcomes in local communities:



Citizenship and ecology such as global connection, connection with nature, interdependence, community responsibility.



Educational such as curriculum, engagement, motivation, whole person development.



Social such as healthy eating and physical activity, community, caring, ethics.



Cultural such as connection with tangata whenua, integrating Māori perspectives, pronunciation.



Economic such as financial savings, financial literacy, shifting patterns of spending.

3. This submission acknowledges South Wairarapa District Council (SWDC) for its support of the Enviroschools Programme in the South Wairarapa District since 2006. It also acknowledges SWDC for progressing towards signing the Memorandum of Understanding between Carterton

¹ National Enviroschools Census. 2014. Kinnect Group

District Council (CDC), Masterton District Council (MDC) and South Wairarapa District Council (SWDC) for the long term delivery of the Enviroschools programme across the Wairarapa.

4. The key requests in this submission are for SWDC to:
 - a. Note the progress achieved with the Enviroschools programme so far during 2016/17
 - b. Continue funding the Enviroschools programme in 2017/18 with a small increase of \$187 to account for inflation to a total of \$11,187.
 - c. Once signed, commit to updating the MoU to confirm a long term funding commitment to Enviroschools beyond 2017/18 if amalgamation does not occur.
 - d. Consider options for the next three year LTP period of enabling further growth in the Enviroschools programme.
 - e. Work with the joint councils of the Wellington region to adopt a more ambitious overall target for reduction in waste to landfill that takes a step change in waste management that will enhance Wellington's reputation and show leadership nationally.
 - f. Note that the Enviroschools programme in the South Wairarapa can play an important role in meeting the goals in the Draft Waste Minimisation and Management Plan
 - g. Amend the Wairarapa Action Plan for the Draft Wellington Regional Waste Minimisation Plan to include reference to Enviroschools, similar to other local authorities.

Progress during 2016/17

5. With funding of \$11,000 from SWDC, the following key highlights have been achieved so far during 2016/17:

- a. Kuranui College registered to be an Enviroschool in 2016, and is only the second secondary Enviroschool in the Wellington region. They have set up an Envirogroup, and have established Environment as a subject for year 9's, and visited Kāpiti College among other actions.



- b. A range of successful professional development and networking events have been held in the Wairarapa with positive feedback. Topics have included Māori perspectives, sustainable communities, climate change, education for sustainability, water and biodiversity.



- c. South Wairarapa Enviroschools have been involved in many

exciting sustainability projects. For example 7 schools have been involved in the Wairarapa Moana project and whitebait connection programme. 3 Featherston Schools developed a joint student committee to take action for Donald's Creek with support from SWDC and GWRC.

4. A Memorandum of Understanding (MoU) between CDC, SWDC, and MDC has been prepared which outlines a long term, integrated commitment of the three councils to the Enviroschools programme. CDC has signed the MoU and MDC and SWDC are progressing towards signing it.
5. We also note that Greater Wellington Regional Council provides strong funding to the Enviroschools programme, and Toimata Foundation provide professional development and programme development capacity at a national level. This national and regional support provides considerable strength to the delivery of the programme in South Wairarapa and the Wairarapa.

We request the following:

6. SWDC notes the positive progress made in the delivery of the Enviroschools programme in the South Wairarapa District so far during 2016/17.

Request for continued funding of Enviroschools in 2017/18

7. SWDC funded the delivery of the Enviroschools programme \$11,000 in 2016/17. We would like to thank SWDC for this funding, and request that SWDC continues to fund the Enviroschools programme \$11,000 in 2017/18 plus a small increase to account for inflation.
8. The Enviroschools programme is flourishing, and has made great progress during 2016/17 as summarised above. The programme, and the schools and early childhood centres within it, contribute strongly to South Wairarapa District Council's long term goals and strategies. In particular, the Enviroschools programme helps to meet district goals by helping schools and centres to:
 - a. Understand why we need to protect and look after our land, air and water.
 - b. value water, understand water management, and manage water use.
 - c. reduce school transport impacts and make healthier transport choices
 - d. manage pests, enhance biodiversity, and value and understand NZ's unique biodiversity
 - e. manage energy and undertake eco-building
 - f. grow food on school property, including vegetable gardens and fruit trees
 - g. understand and take action around climate change
 - h. Build partnerships with tangata whenua, and understand māori perspectives towards the environment.
9. Along with providing strong, tailored facilitation support to our existing Enviroschools, we have developed a strong professional development and networking programme for 2017 in collaboration with local iwi, Wairarapa REAP (Rural Education Activities Programme), Pukaha Mount Bruce, and others. This includes a stormwater workshop and drain art, pest tracking and trapping workshops for students and teachers, and a Pou Taiao workshop providing an

opportunity for students to take action in community biodiversity sites like reserves and wetlands.

10. The fixed annual funding for the delivery of the Enviroschools programme does not take into account inflation over time. The majority of the funding by SWDC goes towards paying for local facilitation based on an hourly rate. It is important for Enviroschools to pay competitive hourly rates, or we will lose skilled, committed staff. We have therefore awarded some pay increases over time. If hourly rates are increased without corresponding increases in funding levels, this erodes the number of hours for delivery of the programme in Masterton.
11. Using a possible CPI increase of 1.7% (see http://www.stats.govt.nz/browse_for_stats/economic_indicators/CPI_inflation/ConsumersPriceIndex_HOTDec16qtr.aspx), funding would need to increase by approximately \$187.

We request the following:

12. SWDC continues to fund the Enviroschools programme in 2017/18 including a small increase to account for inflation to a total of \$11,187.
13. SWDC commits to a long term funding approach that fairly accounts for likely increasing pay rates and expense costs over time.

Request for long term funding commitment

14. CDC, SWDC and MDC may be amalgamated, with a decision expected later this year. If amalgamation is to occur, a new Council will be elected in October 2018 and we would hope that the current MoU which SWDC are progressing towards signing would be used as a basis for the new elected Council to confirm a long term commitment to Enviroschools. If amalgamation does not occur, SWDC will continue operating, including that 2017/18 will be the last year of its three year Long Term Plan cycle.
15. Because of the possibility of amalgamation, the current wording of the Memorandum of Understanding regarding delivery of the Enviroschools programme in the Wairarapa (see attachment) commits CDC, SWDC and MDC to confirmed funding only until the end of 2017/18, then states that longer term funding will be considered beyond this timeframe. This results currently in a lack of security in the programme beyond this time which can affect strategic planning and facilitator job security.
16. In addition, in terms of the next Long Term Plan period starting in 2019/20, we request the SWDC considers options through our joint MoU to provide support the further growth of our programme, including into early childhood and increased support for action projects.

We request the following:

17. If amalgamation does not occur, that SWDC commits to updating and re-signing the MoU based on committing to a long term funding model over a minimum of six years.

18. If amalgamation does occur, that SWDC will ensure that the Enviroschools MoU is part of the documentation taken forward into the new joint council.
19. SWDC considers options for the 2018-2020 LTP period of enabling further growth in the Enviroschools programme including into early childhood and enhanced action project support.

Draft Wellington Regional Waste Management and Minimisation Plan

This section sets out Enviroschools Te Upoko o Te Ika a Māui's submission on the Draft Wellington Regional Waste Management and Minimisation Plan.

Set more aspirational targets

20. We support the aim of the draft plan to reduce waste to landfill to 400kg per person per year by 2026, and realise this goal will require considerable effort and multiple actions to achieve. However we do not consider this target shows sufficient leadership on waste reduction.
21. We urge the joint councils to adopt a braver, more ambitious target that aims for a step change in the way waste is generated and disposed of, and is more aligned with the goal of the plan to be *"waste free, together"*. This more ambitious target should set Wellington up to become a leader around zero waste in comparison to other parts of New Zealand.
22. We also consider the wording of parts of the plan is cautious and takes a conservative approach. This includes the following:
 - a. Section 3.1 of the draft plan paints a picture of a range of challenges that the region faces around waste management. We acknowledge these challenges. However, there are also opportunities that could be highlighted too, and more positive, inspirational language used in the plan to support the changes required.
 - b. We challenge the statement made under section 3.6.4 that *"Total waste and recovered material quantities in the Wellington region are estimated to grow slowly over the next 10 years in line with population and economic growth."* We realise that this is based on a scenario of *"no significant change in systems or drivers"*. However we think this plan should set out a number of possible scenarios into the future instead of using only a business as usual scenario of demand. This could include modelling strong approaches taken in other countries around zero waste.
23. Section 3.6.1 outlines how we are doing as a region compared to the rest of New Zealand. This paints a poor picture of the Wellington region's performance, particularly around household waste per capita and recycling rates at a regional level (realising there are differences across the region, particularly in the Wairarapa). We support the goals of the plan to address this performance, as we think it is critical for the Wellington region to be demonstrating strong leadership around household waste, recycling, and organic waste. We urge the joint councils to

take strong measures to reduce household waste, particularly to significantly reduce the waste to landfill that could easily be diverted.

We request the following:

24. Set a more ambitious overall target for reduction in waste to landfill that takes a step change in waste management that will enhance Wellington’s reputation and show leadership nationally.
25. Include a number of scenarios for future waste projections based on changes in systems and drivers.
26. Use more positive, inspirational language in the plan.
27. Take strong measures to reduce household waste with the aim of being seen as a leader in this area within the next 10 years.

Contribution of Enviroschools to regional waste minimisation actions

28. One of the regional actions of the plan (under R.E.1, and 9.4 Regional Engagement) is *“working together to deliver more consistent and effective forms of regional communications and education around waste services and minimisation, so households and communities are inspired and supported to play their part”*. We support this action.
29. The Enviroschools programme provides a critical role in supporting waste education currently to 107 schools and early childhood education centres in the region. The 2014 census showed that 100% of Enviroschools were taking actions around waste. Schools reach out into their communities through their whānau, students, teachers and others they connect with. They can have considerable influence over the behaviour of communities. Enviroschools provides support on zero waste to Enviroschools as it is one of our five key theme areas. This is through professional development, networking, sharing stories, resources, and other support.
30. In addition, a key feature is that the Enviroschools programme is region-wide and supported by all councils in the Wellington region. Enviroschools is also a leader of the Wellington Regional Environmental Education Forum (WREEF). That makes the programme a key connector, able to operate in different local authority areas, with relationships with many staff in waste teams in councils, along with providers relating to waste management.



31. One of the actions in the plan (R.LM.3 and R.LM.4 under 9.7) is *“Collaborating with other local government organisations, NGOs, and other key stakeholders on undertaking research, lobbying and actions on various waste management issues such as (but not limited to) product stewardship, electronic waste, tyres, and plastic bags.”*
32. Enviroschools could contribute to this action. Enviroschools is a nationwide programme which has partnerships with most local authorities and other key national agencies including Ministry for the Environment. Waste is a key theme area of our programme. Enviroschools often take action around plastic, including plastic bags. For example, in Dunedin, the Envirogroup from Carisbrook School are petitioning parliament to change the law to ban single-use plastic shopping bags in NZ. Enviroschools in the Wellington region have supported this. Enviroschools in the Wellington region are also taking many waste related actions, seeking to demonstrate citizenship for the future, including South Featherston School who learnt about plastic bags and designed a bag made from recycled t-shirts (see photo).



We request the following:

33. Recognise the importance of the Enviroschools programme for contributing to regional actions around waste education and engagement. In particular, actions R.E.1, R.LM.3 and R.LM.4.

Contribution of Enviroschools to Wairarapa waste minimisation actions

34. Page 83 of the Wairarapa Joint Plan states that *“Masterton, Carterton and South Wairarapa District Councils have an existing sub-regional joint Waste Management Plan. The councils are not proposing any new actions other than those outlined in the Regional Action Plan.”*
35. We would like the joint Wairarapa councils to include an action in the Wairarapa Joint Plan under section 10.5.3 Wairarapa Engagement similar to what other local authorities have included which states: *“Support schools to access the Enviroschools programme. Continue to provide funding for the Enviroschools programme to local schools and early childhood centres that agree to participate”*. This acknowledges the contribution the Enviroschools programme can make to waste minimisation outcomes in the Wairarapa.

We request the following:

36. That the following is inserted into the Action Plan for the Wairarapa *““Support schools to access the Enviroschools programme. Continue to provide funding for the Enviroschools programme to local schools and early childhood centres that agree to participate”*.

Conclusion

37. Thank you for the opportunity to make a submission on the Draft Annual Plan for South Wairarapa for 2017/18 and the Draft Wellington Regional Waste Management and Minimisation Plan.

A handwritten signature in black ink, appearing to read 'DRCarter', with a long, sweeping horizontal line extending to the right.

Dana Carter
Regional Co-ordinator
Enviroschools Te Upoko o Te Ika a Māui

Attached: Draft Memorandum of Understanding



Memorandum of Understanding between:

**Masterton District Council
Carterton District Council
South Wairarapa District Council**

March 2017

Memorandum of Understanding between:

- Masterton District Council
- Carterton District Council
- South Wairarapa District Council

March 2017

Introduction

This sets out a Memorandum of Understanding (Memorandum) between the three Wairarapa Territorial Authorities, Masterton District Council (MDC), Carterton District Council (CDC) and South Wairarapa District Council (SWDC) collectively referred to as the joint parties, in relation to the continuing support for, and delivery of, the Enviroschools Programme in the Wairarapa.

Purpose and objectives of this Memorandum

The purpose of this Memorandum of Understanding (MoU) is to record the objectives that the joint parties expect to underpin their ongoing relationship in relation to Enviroschools, and to describe, in general terms, those matters that the joint parties agree to action at this time, as well as those they hope to develop in the future.

The objectives of this MoU are to:

- Provide a secure long term funding model for the delivery of the Enviroschools programme in the Wairarapa over at least 4 years
- Create greater efficiency of delivery of the Enviroschools programme in the Wairarapa
- Improve partnerships between councils and Enviroschools
- Increase transparency and oversight of the Enviroschools programme
- Refine reporting and consistency across the Wairarapa
- Increase opportunities to work on joint priorities linking to environmental and sustainability outcomes in the Wairarapa.

Agreement of the joint parties

To meet the purpose and objectives of this MoU, the joint parties collectively agree to:

- The following funding arrangements:
 - The joint parties part fund the Enviroschools programme as set out in this MoU for the 2017/18 financial year.
 - The joint parties consider a three year funding commitment from July 2017 during Annual plan towards the operating costs of the Enviroschools programme.
- Based on the aims, outcomes and performance measures for the programme set out in this MoU, annually agree a specific set of performance measures and indicators to use for reporting programme delivery each year.
- If one or all of the joint parties wish to see growth in the programme such as in the number of registered Enviroschools beyond what the current level of funding provides for, the joint parties will discuss and agree increased funding as appropriate.

- Provide combined support and advice to Enviroschools. This includes:
 - identifying a key point of contact who can act on behalf of all joint parties
 - forming a joint group with a contact from each party in order to hold joint meetings, and provide collective advice when necessary.
- Ensure Enviroschools facilitators in the Wairarapa are given opportunities to work with council staff to tailor delivery of the Enviroschools programme to the joint parties environmental and sustainability priorities.
- Seek to engage Enviroschools in long term opportunities to use education for sustainability as a way of delivering on the joint parties wider priorities and goals.

The Enviroschools Programme

Enviroschools is a nationwide action-based education programme in schools and early childhood. The vision for the national Enviroschools programme is to foster a generation of people who instinctively think and act sustainably.

Enviroschools roles

Toimata Foundation (a Charitable Trust) manages the Enviroschools programme nationally. The Enviroschools programme in the Wellington Region is delivered by the Te Upoko te ika a Maui team who contract to the Toimata Foundation. This includes a regional coordinator, an administration and support person, and 8 facilitators, 2 of which are based in the Wairarapa.

The Programme in the Wairarapa

The Enviroschools programme has been running in the Wairarapa since 2005. Over this time the programme has grown in strength and profile. The table below lists all currently registered Enviroschools in the Wairarapa.

District	Enviroschool and current reflection stage
Carterton District	Carterton School (Silver) Gladstone School (Silver) South End School (Bronze) St Mary's School (Bronze)
Masterton District	Douglas Park School (GreenGold) Fernridge School (Silver) Ko Te Aroha Makoura Community Early C-Hood Centre Masterton Primary School (Silver) Mauriceville School (Silver) Opaki School (Bronze) Pohutukawa Early Learning Centre St Patrick's School (GreenGold) Tinui School (Silver) Whareama School (Bronze)
South Wairarapa District	Featherston School (Bronze) Greytown School (GreenGold)

	Pirinoa School (Bronze) South Featherston School Tukurumuri School Kouranui College
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Expectations of Enviroschools

To meet the objectives of this MoU, Toimata Foundation (through Enviroschools Te Upoko o te Ika a Māui) will:

- provide services according to the Enviroschools Programme and official handbook. These will be delivered by a contractor or contractors with facilitation skills and experience, and experience working with schools and/or ECE as relevant. The facilitator(s) will be supported by a regional team including the Coordinator for Enviroschools in the Wellington Region.
- Deliver the services in accordance with the aims, outcomes and performance measures of the programme in the Wairarapa (see below)
- provide a joint interim report on progress each year by 15 February which should indicate how the programme is tracking against performance measures and budget.
- provide a joint final report on progress each year by 15 July which:
 - Reviews programme delivery against performance measures and indicators.
 - Provides information on hours/\$ spent across the programme
- Seek to meet at least twice a year with a representative of all councils to discuss progress and issues
- Provide an engagement plan to the joint parties outlining the plan for working with schools and ECE by 30 November each year.

Aims, outcomes and reporting

Aim: Deliver the Enviroschools Programme in order to grow a network of schools and early childhood centres in the Wairarapa committed to sustainability.

Outcomes:

1. The Enviroschools kaupapa reaches a wide and diverse network
2. Sustainable actions and practices and student empowerment within registered Enviroschools are increasing in range and depth
3. The delivery framework and support structures meet the needs of the network in Wellington City

Performance measures	Indicators / Reporting information
Maintain or increase the number of schools and ECE connecting with the enviroschools network in the Wairarapa	<ul style="list-style-type: none"> ● Number of registered enviroschools each year in Masterton ● Number of registered enviroschools registered as enviroschools each year in Carterton ● Number of registered enviroschools each year in South Wairarapa ● Number of schools and ECE involved in the

	wider network including attending events as friends of enviroschools
The enviroschools network has a positive profile in the community	<ul style="list-style-type: none"> ● Number of shared stories (eg Enviroschools website, newspaper, youtube, other media) ● Evidence of sustained partnerships between enviroschools and community groups.
Deepen sustainability practice and student empowerment within the enviroschools network.	<ul style="list-style-type: none"> ● A summary of the range of sustainability topics and initiatives carried out within each enviroschool. ● Registered enviroschools reflect at bronze, silver or green-gold at least every 3-5 years. ● Annual reviews carried out by all registered enviroschools.
The local support framework (see Appendix 1) reflects the needs of schools and ECE and complements local and regional sustainability priorities.	<ul style="list-style-type: none"> ● The engagement plan for schools and ECE includes: <ul style="list-style-type: none"> ● One-on-one support tailored to each Enviroschool's needs (schools only). ● Number of professional development (PD) and networking opportunities provided for both school staff and ECE staff. ● A number of the PD opportunities for both schools and ECE are run in collaboration with other providers. ● Number of schools and ECE involved in the wider network including participating in events ● Positive feedback on support provided. ● Evidence of well developed relationships with a range of providers, and synergies with the funders sustainability priorities.
The provision of Enviroschools to Wairarapa schools and ECE is supported by a strong regional framework and support structure.	<ul style="list-style-type: none"> ● Evidence provided about regional Enviroschools initiatives that strengthen and build capacity of the programme in the region. ● Evidence of facilitators being active members of the regional enviroschools team ● professional development and sharing opportunities for facilitators ● Opportunities for sharing and collaborating between the funders and other local authorities in the Wellington Region.

Funding provisions

The joint parties will consider a three year funding commitment from July 2017 towards the operating costs of Toimata Foundation:

Masterton District Council

Commit at least \$22,500 annually plus GST [\$17,500 for schools and \$5000 for ECE] and an adjustment for inflation based on the Annual Consumer Price Index to be applied each year via the Council's Annual Plan.

Carterton District Council

Commit at least \$8,500 annually plus GST plus an adjustment for inflation based on the Annual Consumer Price Index to be applied each year via the Council's Annual Plan plus any further increase based on an evaluation of increased funding including providing for ECE growth.

South Wairarapa District Council

Commit at least \$11,000 plus GST annually plus an adjustment for inflation based on the Annual Consumer Price Index to be applied each year via the Council's Annual Plan plus any further increase based on an evaluation of increased funding including providing for ECE growth.

Annual funding provision above will be updated following any agreement to growth in the programme beyond the funding provision.

All payments will be made after the submission of an invoice from Toimata Foundation at the start of each financial year after the final joint annual report has been signed off.

Before June 2020 the Funders (or their successor) commit to meet with Toimata Foundation to establish a further commitment to Enviroschools funding for the next three year period beyond July 2020.

Signed for and behalf of Masterton District Council

Signature
Title:
Date:

Signed for and behalf of Carterton District Council

Signature: *Chelene*
Title: *Community Services Manager*
Date: *29th March 2017*

Signed for and behalf of South Wairarapa District Council

Signature
Title:
Date:

**Submission by the Fab Feathy Community-led Development Group
South Wairarapa District Council – Annual Plan Consultation Document 2017/18**

1. Introduction

The following is a submission from the Fab Feathy Community-led Development Project Group (Fab Feathy) to the South Wairarapa District Council (SWDC) regarding the Annual Plan Consultation Document (CD) for 2017-18.

This submission takes the concepts of community-led development and community place making and links these to the key priority area of “building community partnerships”, along with touching on aspects of the five Community Outcomes listed in the SWDC Long Term Plan (LTP) 2015-2025:

- Healthy and economically secure people
- Educated and knowledgeable people
- Vibrant and strong communities
- Sustainable South Wairarapa
- A place that is accessible and easy to get around

2. Executive Summary

This submission outlines how the Fab Feathy group believes that a community-led development approach will result in better outcomes for both the Featherston community and the Council and therefore would like to work in partnership with the Council in relation to any community development project or plan

Taking a community-led approach to any place-making activity; that is, engaging the community at the outset to seek input rather than partway through the development, is more likely to result in community buy-in and a sense of community ownership.

Any investment made by SWDC in Featherston for community development should be aligned with what the community has identified as being important.

We recommend that the council:

- Commits to engaging with the Featherston Community at the outset of a potential development to seek input
- Financially support a dedicated resource to work with the Featherston community (and then wider South Wairarapa region) to consider the information already collected by the Fab Feathy group and develop an implementation plan
- Provides in-kind support for Fab Feathy activities
- Considers how it could take a positive view rather than a deficit view to suggestions made by the community and make it easier to interact with council services or requirements
- Ensure that a representative from the council attends community events and meetings organised by Fab Feathy
- Commits dedicated resources to operate in the community development space (rather than it being an add-on to an existing role)

3. Background

Fab Feathy are a group of volunteers who love Featherston. We are not directly linked to any organisation but we are all involved in community-focussed work or activities in some

capacity. We got together in October 2016 when an opportunity for Featherston to get some support to achieve community-led goals and projects was identified through the Department of Internal Affairs (DIA).

At that stage there was a new opportunity for communities like Featherston to be selected for long-term government support for community-led development via the DIA. Whilst this opportunity still exists in the future, the Fab Feathy group is not waiting to see if and when our community will be supported through this avenue. Rather, we know that a key factor of community-led development is self-determination and ownership by the community which then leads on to action.

Community-led development is a 'new take' on the long established practice of community development. While there are many ways to define community (sector, interest, affinity, online, etc.), community-led development has a distinctive focus on communities of 'place'.

'Place' is increasingly recognised as a useful organising platform for community strengthening as those who live, work, play, care, invest or connect to a particular place tend to have a shared vested interest in making things even better. In this way, 'place' can be seen to transect many aspects of community.

The essence of community-led development is working together 'in place' to create and achieve locally-owned visions and goals. Rather than being a model or service, community-led development is a place-based planning and development approach. Five core principles of community-led development practice have been identified:

- *Shared* local visions drive action and change
- *Utilising* existing strengths and assets
- Many people, groups and sectors *working together*
- Building *diverse and collaborative local leadership*
- *Adaptive* planning and action informed by outcomes

Following on from community-led development, 'community placemaking' refers to communities engaging in shaping the look, function and feel of the places in which they live. It covers a wide range of activities that improve the look and feel of places and build a sense of community, local pride, identity and connection. It is now recognised that the traditional 'services' approach to 'fix' people and problems does not result in the significant and sustainable change in many wellbeing indicators that both communities and governments desire.

4. Commentary

We know that here in Featherston we have a strong tradition of community members and community groups driving the work needed to achieve the change they want to see in town and there are many examples of this - Featherston's Own Charitable Trust, Boomerang Bags, Boundary Road Youth Centre, Meals on Wheels, Free swimming, Swimming Relay, Wetlands Restoration, Featherston Community Centre, Ron Hughes Memorial Athletics, Little Book Exchanges, First Friday... the list goes on.

The key to successful community-led development is taking a coordinated approach where the community collectively identifies what it needs, makes a plan, and then partners with others to make it happen. This process of working together collectively, creates and achieves community ownership of the goals. The role of Fab Feathy is to provide coordination and to be a conduit for action.

In order to develop a community plan Fab Feathy has been going out to the community and asking what it wants for 'Future' Featherston. We have engaged with the community via an online survey and through noticeboards around town, seeking the ideas our community has about what it wants for our town. Through this process we have found out what the Featherston community has identified as being important to them to sustain the energy, passion, and willingness to work together over the long term.

The top five things identified as important to the community were:

- Developing our main street and town centre
- Things for our young people to do
- Employment and training opportunities
- Cycle ways and walk ways
- Heated and covered swimming pool

Please refer to Appendix 1 for a full list of things identified by the community.

We intend to take this feedback and use it to develop a proposed community plan. In this proposed plan we will describe the projects that the community has identified that it wants and would be willing to work on together. We would like to do this in partnership with SWDC.

5. How does Fab Feathy's work contribute to the South Wairarapa; the Annual Plan 2017/2018 and the Long Term Plan 2015-2025?

The Annual Plan Consultation Document (CD) states that the Council has three priorities over the current term:

- To build community partnerships
- To provide the best care and use of our natural resources, assets and infrastructure
- To ensure we have the best Council, staff and officers.

The outcomes sought by Fab Feathy support the achievement of all three priorities stated above. We believe that we provide a vehicle for the Council building community partnerships for the South Wairarapa, and providing the best care and use of our natural resources, assets and infrastructure through providing a structured, co-ordinated and supported vehicle that represents the collective views of the Featherston community in relation to what it wants to see for its future.

This activity also supports LTP Community Outcome of having a "Vibrant and strong community; a place where people feel safe, are proud to live and have a **sense of belonging.**"

We note that the CD does not appear to provide for any direct investment to support the achievement of the important LTP Community Outcome stated above, however we note that the Council currently applies 3% of its revenue to economic, cultural and community development. We also note that there are no dedicated personnel whose role is community development.

We believe that the SWDC should make a firm commitment to community development in the region by appointing dedicated resources to facilitate and coordinate activity, working with local communities to take a community-led approach. We understand that Carterton District Council have at least one person dedicated to this activity with others operating in support. Given that South Wairarapa has a larger area and population than Carterton district,

it makes sense that the SWDC would likewise have dedicated resources operating in this space.

We encourage the Council to consider taking a fresh approach to community development and invite you to engage with the work that Fab Feathy is doing to identify what the Featherston community has determined is important.

We believe that taking a community-led approach to any place-making activity; that is, engaging the community at the outset to seek input rather than partway through the development, is more likely to result in community buy-in and a sense of community ownership. We believe that any investment made by SWDC in Featherston for community development should be aligned with what the community has identified as being important. We suggest that the council support a dedicated resource to work with the Featherston community. Learnings from this approach could then be applied across the region.

6. Conclusion

This submission emphasises the need for a fully co-ordinated and structured approach that strategically aligns resources and efforts in relation to any community development for Featherston. We encourage the Council to engage with the community as the first step in any community development project or plan.

Fab Feathy would like to work in partnership with the Council in relation to any community development project or plan. We believe that a community-led development approach will result in better outcomes for both the Featherston community and the Council.

7. Recommendations

In relation to the work that Fab Feathy has been doing we recommend that the council:

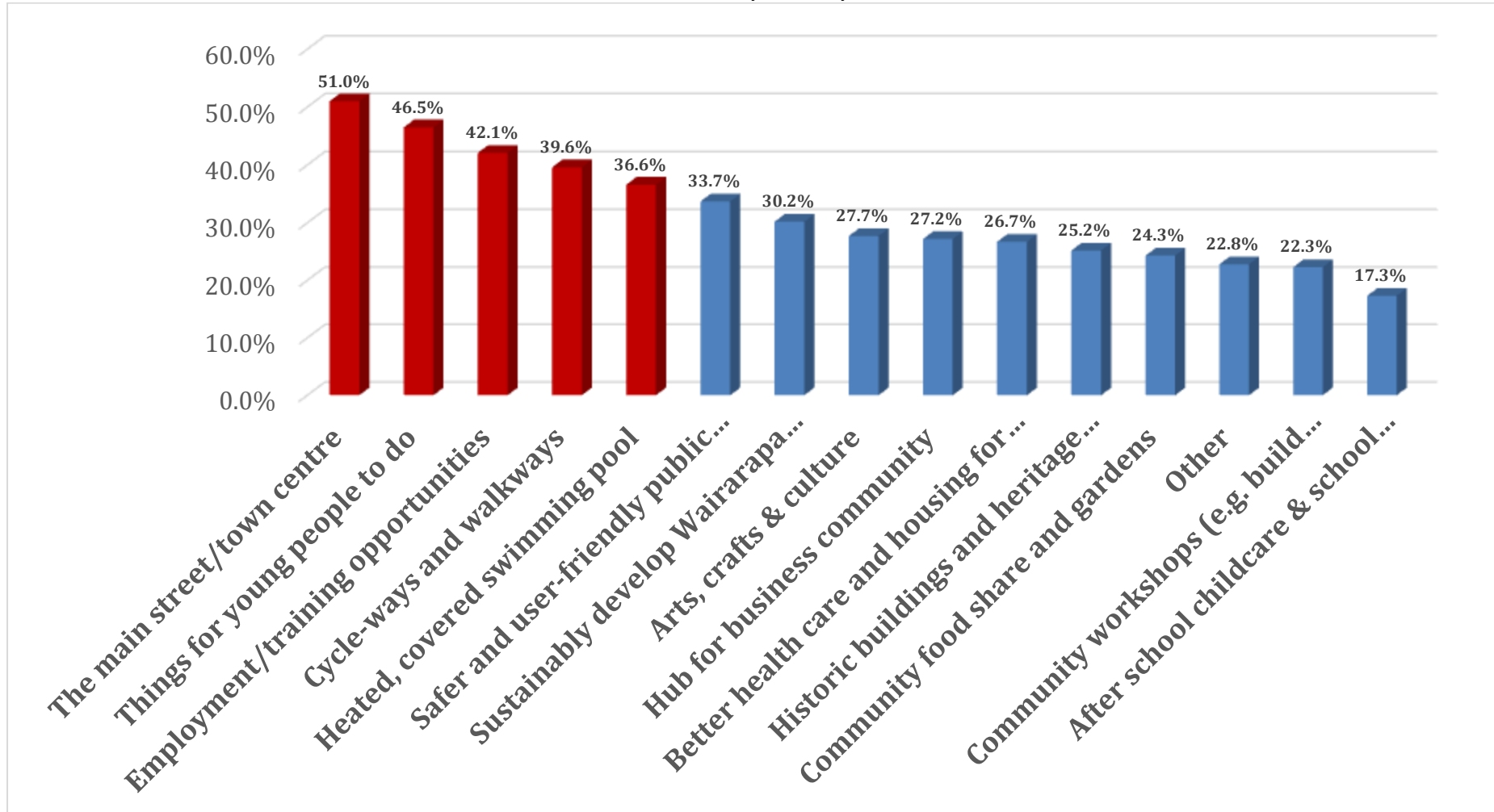
- Financially support a dedicated resource to work with the Featherston community (and then wider South Wairarapa region) to consider the information already collected by the Fab Feathy group and develop an implementation plan - \$15-20k
- Provide in-kind support for the following activities:
 - Venue hire for Fab Feathy organised community events and meetings
 - Printing and copying costs (via the Featherston Library or Information Centre)
 - Use of projectors, sound systems, etc. for said community events and meetings
- Consider how it can make it easier to interact with council services or requirements, i.e. reduce red tape, and take a positive view rather than a deficit view
- Ensure that a representative from the council attends community events and meetings organised by Fab Feathy.

At a wider level we recommend that the council:

- Employ dedicated resources to operate in the community development space (rather than it being an add-on to an existing role)

Appendix 1

Fab Feathy Survey results



Submitted on Friday, 12 May 2017 - 2:29pm Submitted values are:

--Submitter Details--

Name: Chris Webley

Organisation:

Ratepayer: Urban

--Submission Hearings--

Do you want to speak to your submission: Yes

Speaking preference: May 31 am

--Wastewater--

Do you support continuing to defer the cyclical wastewater underground pipe asset replacement programme to accelerate stage one and two of irrigation to land for Martinborough, Greytown and Featherston? Yes

If not, why?

--Swimming Pools--

Do you support providing free swimming in Council's three pools?

: Yes

If not, why?

--Dog pound at Featherston--

Do you support the building of a new dog pound in Featherston:

Yes

If not, why?

Would the council consider a partnership with a local animal welfare organisation or kennels (in light SPCA closure) ? ie share facilities

--Roading--

Do you support deferring some roading rehabilitation for one year and redirecting funds to new footpaths, footpath maintenance and road crossings? Yes

If not, why?

--Fees and Charges--

Please provide your feedback on the proposed fees and charges for 2017/18:

Dog Fees

5 April C5 4.3 "When this policy came in the size of adjustment to move fully to selffunding was significant.

Because of this we have attempted to stage increases over a number of years. The next incremental increase is due this year. Again however it is a reasonably sizeable increase that is required.."

Please publish the future planned incremental increases for full transparency.

--Additional Comment--

If you would like to comment or propose something different now is your chance:

Upload submission:

Upload additional information:

<http://www.swdc.govt.nz/sites/default/files/webform/SWDC%20AP%202018.docx>

The results of this submission may be viewed at:

<http://www.swdc.govt.nz/node/883/submission/842>

Dog Parks	Fthn & MB: Enhance with agility course type features (tyres, weaving etc). Examples in Akld & other towns. Community project? Covered seating.
Council Assets	Conduct regular review of council assets and return on equity; Boar Bush Reserve - Commercial Bee hives Buildings – Pain estate 4 br house + cottage? Rent reviews? Unused/unoccupied land & buildings
Footpaths	Esther Street:- only street on town boundary without any sealed f/path. Visitors to town staying at Claremont motels and arriving by bus have to wheel suitcases along road, which is used as bypass by vineyard vehicles. Many new subdivisions have been done over past 10yrs. Contributions to footpath?
Considine & Centennial Park	Signs notifying that it is a public space (not just for horses) Review MOU for pony club re collecting fees for parking on MB Fair days. Should be put back into park improvements.
Communication	Improve software for notification of SWDC website updates. Current s/w is very limited.

Submitted on Friday, 12 May 2017 - 3:57pm Submitted values are:

--Submitter Details--

Name: Hilary Wilkie

Organisation:

Ratepayer: Urban

--Submission Hearings--

Do you want to speak to your submission: No

Speaking preference:

--Wastewater--

Do you support continuing to defer the cyclical wastewater underground pipe asset replacement programme to accelerate stage one and two of irrigation to land for Martinborough, Greytown and Featherston? Yes

If not, why?

--Swimming Pools--

Do you support providing free swimming in Council's three pools?

: No

If not, why?

Its unlikely that the low cost of entry is the main reason why some choose not to use the pools. Offering some other incentives such as school programmes would probably be better.

Entry fees can be a way to make sure those at the pool are there to swim.

--Dog pound at Featherston--

Do you support the building of a new dog pound in Featherston:

Yes

If not, why?

es, I support the building a new pound and as stated in the consultation its required irrespective of amalgamation so suggest that this building work is progressed now

rather than waiting for amalgamation.

--Roading--

Do you support deferring some roading rehabilitation for one year and redirecting funds to new footpaths, footpath maintenance and road crossings? Yes

If not, why?

Yes, I support the proposal. However I understand that decisions on footpaths are made by the local community boards. I suggest that the programme for footpaths is developed by Council to meet the intended purposes. The main roads, excluding the state highway, in the urban areas should, at the least, have a footpath on one side. McMaster Street for example has a footpath on one side except for the block east of Massey St. I support a new footpath on that block and also considering having the footpath continue along the same side of the road to the main street.

--Fees and Charges--

Please provide your feedback on the proposed fees and charges for 2017/18:

--Additional Comment--

If you would like to comment or propose something different now is your chance:

Upload submission:

Upload additional information:

The results of this submission may be viewed at:

<http://www.swdc.govt.nz/node/883/submission/844>

Submitted on Monday, 15 May 2017 - 9:19am Submitted by anonymous user: [122.61.0.13]

Submitted values are:

--Submitter Details--

Name: Paul Southey
Organisation: Greytown Sport & Leisure Society
Email Address: greytownsport@xtra.co.nz
Postal Address:
Po Box 106
GREYTOWN
Phone: (06) 3048310
Ratepayer: Non-ratepayer

--Submission Hearings--

Do you want to speak to your submission: Yes
Speaking preference: May 31 am

--Wastewater--

Do you support continuing to defer the cyclical wastewater underground pipe asset replacement programme to accelerate stage one and two of irrigation to land for Martinborough, Greytown and Featherston? Yes
If not, why?

--Swimming Pools--

Do you support providing free swimming in Council's three pools?
: Yes
If not, why?

--Dog pound at Featherston--

Do you support the building of a new dog pound in Featherston:
Yes
If not, why?

--Roding--

Do you support deferring some roading rehabilitation for one year and redirecting funds to new footpaths, footpath maintenance and road crossings? Yes
If not, why?

--Fees and Charges--

Please provide your feedback on the proposed fees and charges for 2017/18:

--Additional Comment--

If you would like to comment or propose something different now
is your chance:

Upload submission:

<http://www.swdc.govt.nz/sites/default/files/webform/12%20May%202017-%20Society%20SWDC%20Annual%20Plan%20Submission.docx>

Upload additional information:

The results of this submission may be viewed at:

<http://www.swdc.govt.nz/node/883/submission/847>

12 May 2017

GREYTOWN SPORTS & LEISURE SOCIETY
- SWDC ANNUAL PLAN SUBMISSION 2017

To whom it may concern

With regard to the draft annual plan for the South Wairarapa District Council, the Greytown Sports & Leisure Society would like to present this submission to the South Wairarapa Annual Plan process for 2017.

The Society works to support sports clubs in Greytown. Our work with clubs and sports is well known to the Council.

Some of member clubs have taken the time to consider actions that can be submitted to the Annual Plan process. It is our privilege to be able to forward these comments and recommendations on behalf of our community as a whole to the council for consideration.

Greytown Swimming Pool

The Society strongly supports the free swimming initiative that has been proposed by Council. We are keen to assist with supporting this policy. We believe that there may be opportunities to confirm private sector sponsorship to help meet the increased costs to ratepayers.

However, we also recommend that Council consider the provision of extra shade over the grandstand or beside the grandstand at the Swimming Pool. On busy days and school sports days of both schools, the pool area gets extremely hot and there is minimal shading available.

Greytown Town Centre WBS room and the Forum

We have received several themes of comments in relation to the Town Centre Building as a meeting and function venue.

The Society recommends that action be taken to improve the lighting in the facility. We recommend that current broken lights must be changed with stronger wattage bulbs.

We also recommend:

1. improved heating in the Forum and reconditioned heating and cooling in the WBS room; and
2. Carpet in the WBS room to reduce noise and improve sound quality.
3. Roof and Leak Repairs- When it rains, sound quality becomes very poor in the building.

Soldiers Memorial Park

We would like to acknowledge Council support and repair work to the Pavilion Buildings.

We recommend that Council consider a plan to incrementally add extra fitness and recreation equipment and opportunities for the Park.

The recent Cricket Club 150th at Soldiers Memorial Park was a huge success. However we have received feedback that the liquor licence process was burdensome for the club. We recommend that the Society and relevant council officers work together to look at options to provide and improve information and communication materials for clubs looking at planning events that require liquor permits.

Licences to Occupy and Leases

The Society is aware through its work with sports clubs and community organisations that some groups have out-standing licences to occupy to be updated. We recognise that sometimes the clubs and community groups themselves are the cause delays but we can also see that some delays appear to be a result of a lack of resourcing in this area of council work.

Thank you for consideration of this submission on behalf of the Greytown sport and recreation community.

Toilets at the Southern End of Town

We have received feedback that sporting and other visitors to our town are disappointed in the quality and cleanliness of the public toilets on the reserve at the southern end to town. We request that council consider improvements to, and more regular monitoring of these facilities.

We would appreciate the opportunity to meet with council to present to the Annual Plan process.

Paul Southey
Chairman

Paora Ammunson
Executive Officer



12/05/2017

South Wairarapa District Council
P O Box 6
Martinborough 5741

Email: enquiries@swdc.govt.nz

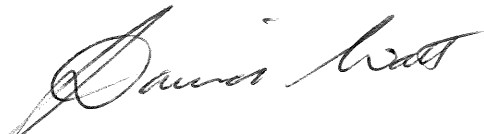
To whom it may concern

**RE. HERITAGE NEW ZEALAND POUHERE TAONGA SUBMISSION ON ANNUAL PLAN 2017/18
CONSULTATION**

1. Thank you for the opportunity to make a submission on the draft South Wairarapa Annual Plan 2017/18 (the Plan).
2. Heritage New Zealand Pouhere Taonga (Heritage New Zealand) is an autonomous Crown Entity with statutory responsibility under the Heritage New Zealand Pouhere Taonga Act 2014 for the identification, protection, preservation, and conservation of New Zealand's historic and cultural heritage. Heritage New Zealand is New Zealand's lead heritage agency.
3. Heritage New Zealand wishes to highlight to the South Wairarapa District Council (the Council) the importance of continued support for partial waiving of reserves contributions and rates rebates in limited circumstances where historical and cultural heritage is conserved or enhanced, and remission of some consent application fees for work undertaken on scheduled heritage buildings.
4. Heritage New Zealand understands the financial constraints the Council faces, but would encourage the Council to consider further incentives for owners of historic heritage places to conserve, enhance and promote their heritage values. Conserving historic heritage benefits not only the owner, but has social and economic benefits for the wider community.
5. As evidenced in areas such as Greytown and Martinborough, well cared for historic heritage can be fundamental to creating an engaging and vibrant region that helps draw people in. This in turn, fosters local identity and helps to build the local economy.
6. Incentive funding provides an important avenue for property owners to undertake conservation works. In some situations, it may be the difference between a historically significant resource falling into disrepair, or it being preserved for present and future generations to engage with and learn from. The district has a range of heritage buildings, including some that have not yet been recognised as such in the district plan. Some of these heritage buildings, including Council-owned heritage assets such as the Martinborough Town Hall, will be subject to revised requirements for earthquake strengthening.
7. As issues such as earthquake strengthening and unreinforced masonry have become more apparent, support for building owners has only become more crucial. Without collaboration between councils, building owners, and other stakeholders (including Heritage New Zealand), there is a risk that New Zealand will lose significant heritage, and that individual districts will lose an important cultural, social, and economic resource. With this in mind, Heritage New Zealand encourages Council to consider setting aside money for a heritage incentive fund.

8. There are a range of other incentives Council could utilise to promote the protection and conservation of historic heritage. One possible incentive is the provision of specialist advice to building owners. There are also regulatory incentives relating to exemptions from select district plan provisions that could be considered at the next Wairarapa Combined Plan review. Examples include reduced parking requirements for heritage buildings converted to commercial use, or reduced restrictions in certain zones for common uses of heritage buildings, like bed and breakfasts. Heritage New Zealand advocates for councils to implement a range of different incentives. This helps to protect historic heritage and shows a council's commitment to the preservation of New Zealand's history.
9. To assist Council in investigating heritage incentives, attached is the *Incentives for Historic Heritage Toolkit*, prepared by Heritage New Zealand.
10. Heritage New Zealand is available to answer any queries Council may have regarding this submission. We can offer further advice to Council and other owners of heritage buildings regarding heritage conservation, and would like the opportunity to be involved in the development of the next Long Term Plan.
- 11. Heritage New Zealand does not wish to be heard in support of this submission.**

Yours sincerely



PP Claire Craig

General Manager
Central Region
Heritage New Zealand Pouhere Taonga

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New Zealand Historic Places Trust Pouhere Taonga
Sustainable Management of Historic Heritage Guidance Series

Incentives for Historic Heritage Toolkit



26 March 2013



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Incentives for Historic Heritage Toolkit

Author: Robert McClean, Senior Heritage Policy Adviser, New Zealand Historic Places Trust Pouhere Taonga (NZHPT).

Acknowledgements: The original 2009 and 2010 versions of this report were prepared with the assistance of Susan Thomson, former post-graduate student, Victoria University of Wellington, the former Auckland City Council and former Rodney District Council. In particular, we thank George Farrant, Principal Heritage Adviser, Auckland Council. His experience in dealing with incentives for historic heritage made a major contribution to this toolkit. We also acknowledge the assistance of Brent Nahkies and Associates Ltd, Christchurch.

Status: This report is an update of previous versions prepared by the NZHPT in 2009 and 2010.

This document is a new guide for inclusion within the *Sustainable Management of Historic Heritage Guidance Series* (the guidance series) published by the NZHPT. The series aims to assist local authorities, owners of heritage places, iwi and hapū and other stakeholders in the protection and conservation of historic heritage under the *Resource Management Act 1991* (RMA) and other related resource management and planning legislation.

This guide updates references to former legislation and policy within the 2000 NZHPT publication *Guidelines for Making Heritage Buildings Accessible* (authored by Julia Gatley). This guide differs from the earlier 2000 guide by focusing on providing links to other guidance sources, updating legislative provisions, and providing guidance objectives and policies for the assessment of proposed access-related work involving heritage places. While some of the legislative and building code information in the earlier 2000 guide has been superseded, this previous version remains a valuable source of information about accessibility and heritage buildings.

Comments and feedback can be provided to the NZHPT about this guide. Please send to:

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Imperial Buildings, Fort Lane Shared Space, Auckland. *Photo, Idealog.co.nz*
Christchurch Arts Centre, August 2011.
Category I historic place. *Photo, Touch Design*

Designed by Richard Roberts, Touch Design Ltd, Wellington

Incentives and rules – bricks and mortar

Heritage incentives are a powerful complement to heritage regulation, and the synergy between them is a valuable heritage tool.

Heritage incentives are not a tenable means of heritage protection used alone, but act in concert with heritage rules and evaluation systems.

The use of either *alone* is potentially weak and problematical.

If sound, meaningful and robust assessment systems and rules are the solid ‘bricks’ of a heritage protection system, then incentives used carefully are the ‘mortar’ that binds the bricks.

While it might be possible to erect a heritage protection approach that uses a mass of dry ‘bricks’ (regulation) alone, it would be potentially unstable.

It is even less likely that one built only of ‘mortar’ (monetary incentives) would be viable ...¹

George Farrant
Principal Heritage Adviser
Former Auckland City Council
2009

¹ George Farrant, ‘Incentives – The Auckland Experience’ Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

1. Introduction

Effective incentives are essential for achieving the preservation of historic heritage for present and future generations. Incentives can be regulatory or non-regulatory, and may include a wide range of policies and methods. Incentives are a key aspect of the economics of historic heritage.

Donovan D. Rypkema is a leading international authority on the economics of heritage buildings. Rypkema visited New Zealand in November 2010 and gave a series of lectures on the economic value of heritage conservation. Rypkema emphasised the critical role of incentives in heritage conservation in ‘bridging the market gap’ which refers to the gap between the costs and value of a property or business. While costs involve the acquisition of the property, cost of the retrofit works and other associated expenses, value relates to operation (rent, vacancy, etc), financing (amount, rate, return), equity (risk, alternatives, tax benefits) and the market return.²

In simple terms, an economic market rate of return is calculated by identifying the costs and considering if the value of the property or business outweighs them. If the cost is in excess of value, then the property or business is unlikely to result in a commercial rate of return. The high cost of earthquake strengthening influences the market gap.

Not all heritage buildings are, however, commercial buildings. Community halls, churches, schools, apartments and dwellings operate on a non-commercial basis involving both private and public sources of funding. These places can also suffer from a gap between the cost of acquisition and maintenance of the building and available income and funding support.

This guide provides a toolkit of available heritage incentives in New Zealand. It also promotes the adoption of incentives for historic heritage. The guide provides information about regulatory and non-regulatory incentives. The regulatory incentives include:

- ▶ Conservation areas.
- ▶ Conservation lots.
- ▶ Conservation lots transferable development right (TDR).
- ▶ Waivers of zone provisions.
- ▶ Specified permitted uses.
- ▶ Plot ratios or site intensity zonings.
- ▶ Bonus floor area TDR.
- ▶ Contributions (development and financial).
- ▶ Consent fee waivers.
- ▶ Measures relating to the *Building Act 2004* (the Building Act).

² Donovan D. Rypkema, ‘Incentives for Heritage’, Presentation to NZHPT, Antrim House, 16 November 2010.



<http://www.fis.org.nz/>



Cultural Funding Guide, Ministry of Culture and Heritage

www.mch.govt.nz/funding-guide/search?fcats=Heritage

In relation to regulatory incentives, the guide provides some examples currently adopted by local authorities in New Zealand and detailed evaluation of incentives in relation to costs, benefits, transparency and clarity, manageability and legitimacy. The non-regulatory incentives include:

- ▶ Private-public partnerships (PPPs).
- ▶ Heritage grants and loans.
- ▶ Rates relief.
- ▶ Tax relief (including tax depreciation).
- ▶ Public purchase and revolving acquisitions and funds.
- ▶ Insurance rebates.
- ▶ Urban design, events and promotion.
- ▶ Other heritage incentives.

In addition to providing information about these incentives, the guide promotes the development of: a new central government grant/loans/tax scheme for the strengthening of earthquake-prone heritage buildings; and a heritage credit scheme that rewards owners to carry out regular repair and maintenance of historic heritage.

The guide also promotes good regulatory standards and national consistency in terms of regional and district plan rules for historic heritage and as promoted by the Government's *Code of Good Regulatory Practice*.³

The appendices of the guide provide an updated summary of heritage incentives provided by local governments in relation to:

- ▶ District plan regulatory incentives.
- ▶ Consent fee waivers.
- ▶ Heritage-related grants.
- ▶ Rates relief available for historic heritage.
- ▶ Other types of incentives.
- ▶ Former Auckland City Council, list of heritage floor space bonuses granted and recipient sites.

Further, the appendices provide guidance for the establishment and management of a local authority heritage grants scheme.

The guide does not contain all relevant information about the wide topic of heritage incentives. Its focus is on local government, with some information about central government incentives for private owners of historic heritage.

³ Ministry of Economic Development, *Guidelines on the Regulatory Impact Analysis Requirements*, Regulatory Impact Analysis Unit, March 2007.

Additional information about incentives and funding sources generally can be obtained by contacting the Funding Information Service⁴ or the Ministry for Culture and Heritage *Cultural Funding Guide*.⁵

In terms of background context, the guide is accompanied by detailed theoretical and legislative research about heritage regulation and incentives as a separate research paper.⁶ Further, valuable information about heritage incentives is provided in the Australian EPHC National Incentives Taskforce Report, *Making Heritage Happen: Incentives and Policy Tools for Conserving our Historic Heritage*⁷ and the Heritage Chairs and Officials of Australia and New Zealand (HCOANZ) guide, *Incentives for Heritage Protection Handbook: A National Guide for Local Government and the Community*.⁸

The following checklist is designed for local authorities as a guide to assist the planning process when considering the use of incentives for historic heritage.

1.1. Checklist for incentives for historic heritage

- Is the objective of the incentive to encourage the conservation of historic heritage in the region or district?
- Is the incentive developed as part of an overall strategy for historic heritage? Will the incentive be managed under a clear policy or guidelines? What is the process for approval of the policy and guidelines? How will owners of historic heritage be involved and consulted?
- Will the incentive complement any rules adopted in the regional or district plans? Are the current heritage rules robust and of high quality?
- What type of historic heritage requires an incentive-based approach (an individual place, earthquake-prone heritage buildings, group of places, an area, or all scheduled places)?
- What class of historic heritage requires an incentive-based approach (rural, commercial, industrial, recreational or residential places)?
- What is the heritage significance of the places or areas?
- How will the incentive benefit historic heritage, including Māori heritage?
- Have the risks to historic heritage been identified – fire, earthquakes, flood, vandalism, demolition by neglect, etc?
- What are the incentive options? Have other valid alternative approaches been identified?

4 <http://www.fis.org.nz/>

5 <http://www.mch.govt.nz/funding-guide/search?fcats=Heritage>

6 Robert McClean 'Regulation and Incentives for Historic Heritage: Theoretical and Legislative Overview, Historic Heritage Research Paper No.6 (draft working paper), NZHPT, 22 February 2010.

7 National Incentives Taskforce for the EPHC, *Making Heritage Happen: Incentives and Policy Tools for Conserving our Historic Heritage*, February 2004.

8 HCOANZ, *Incentives for Heritage Protection Handbook, A National Guide for Local Government and the Community*, 2009, <http://heritage.vic.gov.au/admin/file/content2/c7/Incentives.pdf>

- What are the costs and benefits of the preferred option(s)? How will the preferred option(s) be effective in achieving the objective?
- Will the preferred option(s) be transparent and have clarity? Also will the preferred option(s) be manageable and obtain political support?
- How will the incentive be managed and advertised to the public and owners of historic heritage?
- How will the incentive be monitored, and what will be the indicators to measure the success of the incentive?

2. Historic heritage regulation

The manner in which heritage regulation is designed and implemented can help to clarify the management of externalities and other issues such as the improved allocation of public goods and reducing information asymmetries. All regulation should be designed to adhere to principles of good regulatory practice.⁹ These principles aim to ensure that laws have the following attributes:

- ▶ Transparency to both the decision-makers and those affected by regulation.
- ▶ Have clarity, being understandable and accessible as well as practicable.
- ▶ Should be fair and treat those affected equitably.
- ▶ Rules should be the minimum necessary to achieve the desired outcomes.
- ▶ Compliance costs should be reasonable with minimal fiscal impact.
- ▶ Are compatible internationally.

These principles have informed the government's The Best Practice Regulation Model: Principles and Assessments.¹⁰

With regard to historic heritage regulation under the RMA, the NZHPT carried out a national assessment of district plan heritage provisions in 2009 and 2011.¹¹ The review highlighted a number of issues concerning heritage rules in these plans. In particular, the review revealed there are varying degrees of quality provisions in the district plans. Common issues of quality and information are:

- ▶ Overall lack of national consistency of approach with the use of a variety of terms to describe and define historic heritage.
- ▶ Lack of clarity with respect to some key rules, such as the repair and maintenance of listed heritage items.

⁹ Ministry of Economic Development, *Guidelines on the Regulatory Impact Analysis Requirements*, Regulatory Impact Analysis Unit, March 2007; Regulatory Review.

¹⁰ The Treasury, *The Best Practice Regulation Model: Principles and Assessments*, NZ Government, July 2012.

¹¹ Robert McClean, 'National Assessment of District Plan Heritage Provisions', Historic Heritage Research Paper No.2, NZHPT, January 2009; Robert McClean, 'National Assessment of RMA Policy and Plan Heritage Provisions', NZHPT, 2011.

- ▶ Absence of explicit rules, such as relocation, signage and subdivision.
- ▶ Lack of information about scheduled heritage items, especially with regards to significance.
- ▶ Absence of geographical boundary information, showing the extent of heritage items listed in district plans.

The NZHPT considers that there is potential for heritage regulation to be more effective with greater national consistency. This will involve action at both national, regional and district levels. At the national level, the NZHPT has published non-statutory guidance for historic heritage under the RMA – *The Sustainable Management of Historic Heritage Guidance Series*. This series promotes the adoption of best practice standards for the management of historic heritage, including the adoption of common terms, definitions, rules and assessment standards.

In summary, it is hoped that with the adoption of best practice standards, local authority heritage regulation under the RMA will be more robust and efficient. This will involve:

- ▶ The availability of public information about historic heritage and its management under the RMA.
- ▶ Common approaches in the adoption of best practice processes for the identification of historic heritage.
- ▶ The adoption of best practice regulatory and non-regulatory options for historic heritage, especially incentives.
- ▶ Common approaches for the regulation of historic heritage in regional and district plans in terms of basic definitions, heritage schedules, consent information requirements and rules relating to repairs and maintenance, alterations and additions, relocation, demolition/damage, subdivision, and new buildings.
- ▶ Common approaches for heritage-related resource consent processes, notification and the use of heritage impact assessments.
- ▶ Provisions to promote improved building safety with rules that encourage earthquake strengthening, fire safety and physical access.

2.1. Conservation area zoning

Regulation, in relation to listing, affects the value of property in diverse ways depending on the type of regulation and place, and the environmental and social context. As explored in the theoretical overview paper, overseas research has shown that conservation areas or heritage character zoning can have a positive effect on property values.

In terms of residential conservation areas, heritage zoning can often provide ‘certainty’ for owners in relation to maintaining a ‘sense of place’ and the control activities such as infill, subdivision and new buildings. This can result in positive effects in property values for conservation areas in comparison to other non-heritage zones.¹² As explained by Lucian Cook, the positive effect is often related to the management of the surroundings:

To put this in simple terms, the architectural credentials of an individual building mean very little if the property looks out over a 1960’s multi-storey car park. By contrast, a reasonably sympathetically designed modern dwelling located within an area that has retained a sense of place by virtue of the quality of its overriding built heritage will in all likelihood carry a significant premium over the same dwelling within a modern housing estate.¹³

This overseas research tends to support anecdotal evidence of the positive effect on property values of residential conservation areas in Wellington and Auckland.¹⁴

The positive impact of listing, however, on private property values is not a guaranteed correlation. While conservation zoning may have positive effects on property values in cities such as Auckland and Wellington, the results in smaller provincial centres may be more uncertain. Also as illustrated by the Allen Consulting Group in Australia¹⁵, registration, listing, or protection of historic residential properties can often have little influence on property values. Other factors such as location, general amenity, and general crime rates can be much more important deciding factors for property values.¹⁶

¹² Lucian Cook, ‘The Economic Value of Conservation Areas’ *Conservation bulletin*, Issue 62, Autumn 2009, pp 21–23.

¹³ Ibid, p 21.

¹⁴ George Farrant, ‘Incentives – The Auckland Experience’ Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

¹⁵ The Allen Consulting Group, *Valuing the Priceless: The Value of Historic Heritage in Australia*, Prepared for the Heritage Chairs and Officials of Australia and New Zealand, November 2005.

¹⁶ *Managing Australia’s Historic Heritage: Looking to the Future, Submission by the Chairs of the Heritage Councils of Australia and New Zealand to the Productivity Commission Inquiry into the Conservation of Historic Heritage Places*, October 2005, p 16.

2.2. Development area zoning

Development area zoning is used extensively in North America and Europe to facilitate the development of a historic area or precinct. This type of zoning is often called ‘regeneration development zones’ or ‘special development precincts’. The zoning aims to assist the development of an area by providing for specific permitted uses, management structures, and private-public funding arrangements. In England, with assistance from the European Union, development zoning has achieved the regeneration and adaptive reuse of substantial historic townscapes such as the historic centre of Newcastle, the Liverpool waterfront and industrial heritage in the Midlands.

In 2008, the Sustainable Development Unit of the Department of Internal Affairs released the draft *Building Sustainable Communities Discussion Document*. This document identified the need for new tools to address development area issues and the creation of new urban development project areas. These areas could be established to facilitate appropriate development of historic areas and achieve conservation objectives. As indicated in the Wellington waterfront example that follows, important considerations are finding the balance between preservation and development and ensuring strong public accountability.

2.2.1 Lambton Harbour Development Project (LHDP)

The Lambton Harbour Development Project was established in the late 1980s to facilitate the transformation of the Wellington waterfront. The area was set aside for management as a special development area under the control of a private-public body – Lambton Harbour Management Limited (LHML). The special development area facilitated major changes to the Wellington waterfront with the removal of a large number of former wharf buildings, construction of new buildings and parks and preservation of significant heritage buildings such as the former Wellington Harbour Board offices as the new Wellington Museum of City and Sea.

The special development area, however, was heavily criticised by the public during the 1990s as a result of demolition and the construction of inappropriate new buildings and loss of public space. The criticism resulted in greater control over management by the Wellington City Council and the introduction of new waterfront planning provisions in the district plan to protect historic heritage and preserve public space.¹⁷

¹⁷ Page. S, ‘Regenerating Wellington’s Waterfront’ *Journal of Town and Country Planning*, Jan-Feb, 1993, pp 29–31.

3. Regulatory incentives

3.1. Conservation lots

Conservation lots are a flexible subdivision provision that is the most common heritage-related incentive in district plans. Conservation lots provide the potential to allow an applicant to subdivide a property below the minimum lot size in order to preserve heritage values. The basic standards associated with the flexible subdivision rule are:

- ▶ Council can consider, as a discretionary activity, the subdivision of property containing a historic heritage item.
- ▶ The proposed subdivision to create a conservation lot may be lower than the minimum lot size of the relevant zone.
- ▶ The subdivision will result in the whole of the historic heritage item being physically and legally protected in perpetuity.
- ▶ An agreement or covenant should be entered to provide protection in perpetuity. The agreement or covenant should be finalised prior to Council making a decision under section 104 of the RMA or as a consent condition. These agreements or covenants may include:
 - i. Heritage Covenants (section 6 *Historic Places Act 1993*).
 - ii. Open space covenants (section 22 *Queen Elizabeth the Second National Trust Act 1977*).
 - iii. Protective covenants (section 18 *Crown Forests Assets Act 1989*).
 - iv. Conservation covenants (section 77 *Reserves Act 1977*/sec 27 *Conservation Act 1987*).
 - v. Protected private land agreements (section 76 *Reserves Act 1977*).
 - vi. Nga whenua rahui kawenata (section 77A *Reserves Act 1977*/section 27A *Conservation Act 1987*).
- ▶ An agreement or covenant should incorporate specific protective or enhancement measures to maintain or enhance the conservation values of the property, including public access.
- ▶ The proposed subdivision should be of a sufficient area to protect the curtilage and surroundings associated with the listed historic item.

3.1.1 Conservation lot provisions in New Zealand

There are a number of district plans with specific conservation lot provisions for historic heritage (see Appendix 2). Conservation lots are also referred to as ‘environmental protection lots’ or ‘heritage lots’.

In the Far North District Plan, rule 12.5.6.3.1 provides for a ‘development bonus’ “where a site contains a heritage resource and where this resource is proposed to be permanently protected, restored or rehabilitated, the Council may grant consent to an application to subdivide one or more bonus lots. The new lot(s) can be either from the parent title on which the area to be protected, restored or rehabilitated is located or on another title. The new lot(s) may be created in addition to the rights to subdivide which would otherwise apply, and may include the area to be protected, restored or rehabilitated. The minimum area of a bonus lot shall be the minimum area provided for as a discretionary subdivision activity in the relevant zone.”

The Far North District Plan provision requires that a covenant or a consent notice records this commitment to protection, restoration or rehabilitation before any bonus can be given effect to. The Council may impose as a condition of consent that a bond be paid, to be refunded when the Council is satisfied that the conditions attached to that consent have been complied with. The Council may provide assistance in respect of any such application by waiving resource consent charges and reserve contributions. An application made in terms of this rule would see the NZHPT, and where appropriate the tangata whenua, considered an affected party.

Many other plans have provisions for subdivision flexibility to protect historic heritage. For example, The Auckland City Central Area District Plan (Rule 10.4.2) provides that, where a heritage property is the subject of an approved conservation plan, subdivision of the heritage property will be considered as a non-notified application for a discretionary activity and may be exempt from the plan’s standard subdivision requirements.

Conservation lot provisions require ongoing monitoring by local authorities to ensure that consent conditions are being adhered to and that the property is not abandoned resulting in ‘demolition by neglect’. Further, monitoring is required to ensure flexible subdivision rules do not have cumulative adverse effects, resulting in a large number of small subdivisions over an area which can undermine the open-space provisions of the district plan.

Evaluation of the efficiency and effectiveness of conservation lots

Costs	<p>The costs of conservation lots to owners include the cost of establishing the lot via subdivision; establishing a covenant, and ongoing care and maintenance.</p> <p>The cost of conservation lots to the community involves the expenses associated with management and monitoring of the lots and the potential environmental cost of ‘patchy’ subdivision that is contrary to the objectives and policies of the district plan.</p> <p>Support for long-term maintenance of the conservation lot may require public funds in the form of grants and rates remission.</p>
Benefits	<p>The benefits of conservation lots to owners include the ability to subdivide to ensure the ongoing conservation of a historic property that would be otherwise not allowed. This may release surplus land available for development to offset the cost of establishing and maintaining the conservation lot.</p> <p>The benefits of conservation lots to the community is the potential long-term conservation of a historic property.</p>
Transparency and clarity	<p>Conservation lots are relatively simple and straightforward for owners, decision-makers and the community.</p>
Manageability	<p>Conservation lots require territorial authority management systems. The decision-making process should be informed by professional heritage advice.</p>
Legitimacy	<p>Conservation lots generally enjoy a high level of political support.</p>

Evaluation of the efficiency and effectiveness of conservation lots

Comment	<p>The full environmental compensation implications of a proposed conservation lot require consideration, including the cumulative effects on the environment.</p> <p>Covenants are required to ensure that conservation lots are subject to continual care and maintenance. There is a risk that conservation lots are abandoned and subject to ‘demolition by neglect’. A covenant should be agreed upon between owner and local authority prior to conservation lot approval.</p> <p>Demand for conservation lots is associated with general demand for subdivision. The incentive may not be effective in areas of low subdivision demand.</p> <p>Conservation lots are generally more appropriate for rural heritage, especially archaeological sites.</p> <p>Establishment of a conservation lot should qualify the owner to rates remission under the local authority rates remission policy.</p> <p>Establishment of a conservation lot should be informed by a conservation plan and sufficient information on the heritage values of the property.</p> <p>The boundaries of the conservation lot should be sufficient to protect the historic place and its surroundings. For example, a historic farm protected by a conservation lot should include all parts that contribute to the heritage value of the entire farm complex such as the homestead, woolshed, out-buildings and any significant vegetation area.</p>
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3.2. Conservation lots transferable development right (TDR)

Conservation lots can form part of a TDR regime for an entire district or area. This regime allows landowners to sell potential development interests from a particular piece of property under the protection of a conservation lot. Purchases would be other landowners who intend to increase the density of their land using the TDR bonus.¹⁸ This regime could be designed to preserve open-space rural and heritage landscapes and provide an incentive for landowners who are restricted to subdivide in a certain location.

3.2.1 Former Rodney District conservation lot TDR

The former Rodney District Council was one of the few local authorities in New Zealand that maintained a conservation lot TDR regime. In the Rodney District Plan (now managed by Auckland Council) conservation lots are a restricted discretionary activity under Rule 17.9.4(g) which provides for “the subdivision of a listed item for the purpose of ensuring the long term preservation of the item, where the sites created will not meet the site area and dimension requirements of the relevant zone.” These lots can become part of a TDR regime under the subdivision rules (Rule 7.14.12.3). This scheme applies to any land that is covenanted or protected within the rural zone (except the countryside living zone) and is no larger than 20 hectares. The recipient sites must be with the countryside living town zone.

The former Rodney District’s TDR scheme has been operating for nine years since the introduction of the district plan. The scheme is currently under review as part of the preparation of the Auckland Unitary Plan. Key issues confronting the scheme include limited opportunity or space for use within the receiving areas (the countryside living zone), the need to transfer titles from a consented subdivision, and the requirement to ensure ongoing maintenance and conservation of land protected in donor areas. Further, while the scheme has been applied to natural heritage, there have been no applications for conservation lots and TDR involving historic heritage.

TDR schemes involving conservation lots require careful district-wide planning. The cumulative effects of land transfer need to be considered as part of an environmental compensation approach. International research on conservation lot TDR notes that the scheme requires strong land use regulations which closely controls the supply and demand of land in a district. Further, TDR schemes need to clearly identify bonus areas (sending areas) and recipient areas (receiving areas). There can be strong opposition from residents in the receiving areas which has the potential to erode political support for TDRs. There can also be substantial administrative costs involving complex land transfer transactions.¹⁹

¹⁸ Jason Hanly-Forde, et al, *Transfer of Development Rights Programs: Using the Market for Compensation and Preservation*, Cornell University

¹⁹ Jason Hanly-Forde, et al, *Transfer of Development Rights Programs, Using the Market for Compensation and Preservation*, Cornell University.

Evaluation of the efficiency and effectiveness of conservation lots TDR

Costs	<p>The costs of conservation lots TDR to owners include: the expense of establishing the lot via subdivision; establishment of the covenant(s); ongoing care and maintenance, and costs relating to transfer of the development right.</p> <p>The cost of conservation lots TDR to the community involves the cost of managing the TDR scheme and price of greater intensive subdivision of land in the recipient area (receiving area).</p>
Benefits	<p>The benefits of conservation lots TDR to owners involve the potential to receiving a monetary incentive as a result of establishing a conservation lot.</p> <p>The benefit of conservation lots TDR to the community is the potential long-term conservation of land in an area in return for accepting greater intensive subdivision an another area.</p>
Transparency and clarity	<p>Conservation lots TDR can be complex and difficult for the general public to comprehend.</p>
Manageability	<p>Conservation lots TDR require intensive management and regulation by the territorial authority.</p>
Legitimacy	<p>Conservation lots TDR may not receive political support as a result of opposition from landowners in recipient areas.</p>
Comment	<p>The full environmental compensation implications of a proposed conservation lot TDR require consideration, including the cumulative effects on the environment.</p> <p>Covenants are required to ensure that conservation lots are subject to continual care and maintenance. There is a risk that funds generated by conservation lots TDR are not invested into the care and maintenance of the conservation lot and are potentially subject to ‘demolition by neglect’.</p> <p>Demand for conservation lots TDR is associated with general demand for subdivision. The incentive may not be effective in areas of low subdivision demand.</p> <p>Conservation lots TDR are generally more appropriate for rural heritage, especially archaeological sites</p> <p>The range of covenants should be considered (i.e. open-space covenants and heritage covenants).</p> <p>Establishment of a conservation lot and TDR should be informed by a conservation plan and sufficient information on the heritage values of the property.</p>

3.3. Waivers of zone provisions

Waivers of zone provisions ensure that there is flexibility in the district plan for historic heritage in relation to matters such as undertaking a commercial activity in a residential zone, car parking requirements, loading, and site access and landscaping. The waiver for zone provisions should provide:

- ▶ That Council can consider, as a discretionary activity, any application to alter, reduce, or waive any activity control or development control specified in any other section of the district plan.
- ▶ The proposed waiver may include undertaking commercial activities in residential zones if the purpose of the commercial activity is to achieve the adaptive reuse of the listed heritage item and the adverse effects are minor.
- ▶ The proposed waiver must be necessary to achieve the conservation and adaptive reuse of a listed heritage item.
- ▶ Council will consider any adverse effects on the environment associated with the proposed waiver.

3.3.1 Waivers of zone provisions in New Zealand

Waivers of zone provisions are provided for in a number of district plans (Appendix 2). In the Rodney District Plan, Plan Change 144 introduced new provisions for the **Helensville Town Centre Heritage Policy Area**. The provisions include an amendment to Rule 21.10.2.2 which provides an exemption for heritage buildings from the on-site car parking requirements. In its reasoning, the plan states that:

“The Council recognises that the provision of required on-site car parking can be to the detriment of character buildings on sites that currently have little or no available off-street car parking. The priority in the Helensville Town Centre Heritage Policy Area is the preservation and enhancement of heritage value and character. Exemption for off-street car parking is considered appropriate to encourage the retention of buildings while allowing for change and adaptive use.”

The **Hauraki District Plan** (Rule 71.7) states that “notwithstanding any other provisions in the District Plan, Council may waive or reduce any bulk and location, number and location of parking spaces and landscaping standard which relates to a proposal to modify, add to or alter a Scheduled Feature, provided that in the opinion of Council, such action would: assist with the protection of the feature; and the amenities of neighbouring properties and/or the safe and efficient functioning of the street or road will not be significantly compromised.”

The **Whakatane District Plan** includes a ‘change of activity’ provision (Rule 3.11.12.2). This rule states that “Council may consent to the redevelopment of Scheduled Heritage items not in conformity with the District Plan's performance standards where conformity with the zone standards and terms would change the intrinsic value and character of the heritage item and encourage the protection and preservation of the Scheduled Item.”

The **Christchurch Central Recovery Plan** introduced substantial zone waiver provisions in July 2012 to facilitate the heritage recovery of the city. The rule (applying to the central city) means that in respect of any activity on any site involving historic heritage, applicants are not required to comply with a number of standards such as scale of activities, retailing, car parking space numbers, building setbacks and continuity.

Evaluation of the efficiency and effectiveness of waivers of zone provisions

Costs	<p>The costs of waivers to owners include the expense of application and process under the RMA.</p> <p>The costs of waivers to the community may involve some adverse environmental effects in relation to matters such as traffic, parking, noise, loading and access being relaxed or waived.</p>
Benefits	<p>The benefits of waivers to the owners involve the potential for flexible rules to facilitate adaptive reuse of a historic place, especially in relation to commercial activity.</p> <p>The benefits of waivers to the community is the potential long-term adaptive reuse of a historic place.</p>
Transparency and clarity	<p>Waivers are relatively simple and straightforward for owners, decision-makers and the community.</p>
Manageability	<p>Waivers require territorial authority management systems. The decision-making process should be informed by professional heritage advice.</p>
Legitimacy	<p>Waivers generally enjoy a level of political support.</p>
Comment	<p>The full environmental compensation implications of proposed waivers require consideration, including the cumulative effects on the environment.</p> <p>Waivers are generally associated with demand for commercial development. The incentive may not be effective in areas of low development.</p> <p>Waivers are generally limited to built heritage used for a commercial or public purpose.</p> <p>Consent fees should not be charged for waiver of zone provision applications.</p> <p>Local authorities should be informed by professional heritage advice.</p>

3.4. Specified permitted uses

Specified permitted use rules are a similar method to waivers of zone provisions. However, instead of a general waiver, the rule specifies particular uses that will be allowed for listed heritage items as a permitted activity. Currently, district plans in New Zealand are limited to providing for repairs and maintenance of a listed heritage item as a permitted use. Some local authorities have certain permitted uses for zones.

Providing for specified permitted uses is an important method of encouraging sensitive adaptive reuse and could include activities such as:

- ▶ Bed and Breakfast (B&B) accommodation.
- ▶ Small-scale entertainment and wedding-related functions.
- ▶ Social functions and public meetings.
- ▶ Specialised small-scale retail activities (i.e. crafts, pottery, merchandising, Devonshire teas, cafe).
- ▶ House museums and art galleries.

As an example, the proposed Waipā District Plan (notified June 2012), encourages the ongoing protection of Waipā's heritage items through the implementation of incentive rules relating to the reuse of such buildings. For this purpose, Policy 2.3.6.5 (which is implemented by rules) makes provision for medical centres, offices, restaurants, cafes and other eating places, and childcare and pre-school facilities to occur within buildings listed in the heritage schedule (Appendix N1). The transportation zone also contains relaxation of parking, loading and access requirements.

Specified permitted uses are also relevant to the Building Act. It is common in New Zealand for historic commercial centres to have active ground floor retail areas. However, often these commercial centres are characterised by vacant floor space above the ground level. The change of use provisions in the Building Act can be a significant disincentive to convert retail or office space for apartment accommodation (see section 3.9 of this guide). Allowing a specified accommodation use in a district plan could be part of an overall incentive strategy to promote adaptive reuse in a particular area or zone.

Evaluation of the efficiency and effectiveness of specified permitted use provisions

Costs	<p>The costs of specified permitted use provisions to owners include the expense of application and process under the RMA.</p> <p>The costs of specified permitted use provisions to the community may involve some adverse environmental effects in relation to matters such as traffic, parking, noise, loading and access.</p>
Benefits	<p>The benefits of specified permitted use provisions to the owners involve the potential for flexible rules to facilitate adaptive reuse of a historic place, especially in relation to commercial activity.</p> <p>The benefit of specified permitted use provisions to the community is the potential long-term adaptive reuse of a historic place.</p>

Evaluation of the efficiency and effectiveness of specified permitted use provisions

Transparency and clarity	Specified permitted uses are relatively simple and straightforward for owners, decision-makers and the community.
Manageability	Specified permitted uses require territorial authority management systems. The decision-making process should be informed by professional heritage advice.
Legitimacy	Specified permitted uses generally enjoy a level of political support.
Comment	<p>The full environmental compensation implications of specified permitted uses require consideration, including the cumulative effects on the environment.</p> <p>Specified permitted use provisions are generally associated with demand for commercial development. The incentive may not be effective in areas of low development.</p> <p>Specified permitted use provisions are generally limited to built heritage used for a commercial purpose or a change of use. It is important to align any waivers of zone provisions with similar flexibility under the Building Act.</p>

3.5. Plot ratios or site intensity zonings

A plot ratio is the measure of the total floor area of a building that is able to be constructed on any given site. Higher plot ratios will encourage larger and taller buildings. Most cities have the highest plot ratios in the CBD with lower plot ratios in suburban and industrial zones. Generally, higher plot ratios on heritage properties have the potential to promote more intensive development and adversely affect heritage values.

The Wellington City District Scheme in 1983 contained an additional floor space incentive which allowed owners to construct extra floor levels over the permitted height levels on the same site as a listed heritage item.²⁰ This incentive was strongly criticised by community groups in allowing the Kirkaldies development on Lambton Quay which involved a large tower built over a preserved façade. With the introduction of the Wellington City District Plan under the RMA in the mid-1990s, the additional floor space incentive was removed.

The Auckland City Central Area District Plan contains the most detailed plot ratio zonings in New Zealand. These site intensity zonings are provided for in Planning Overlay Map 5. The zonings show Basic Floor Area Ratio (BFAR) and Maximum Total Floor Area Ratio (MTFAR). The BFAR is the gross floor area allowed as a permitted activity. The total floor area allowed, plus the accumulation of any bonus floor area, cannot exceed the MTFAR.

The Auckland City Central Area is divided into 11 different site intensity zones which make up the precincts and quarters. As an example, the Karangahape Road Precinct has a site intensity ratio of BFAR 4:1 and MTFAR 6:1. The highest site intensity zone is the high-rise area to the west of Queen Street which has an BFAR 6:1 and MTFAR 13:1.

There are specific site intensity zones for some heritage precincts in the Auckland City Central Area. The Britomart Precinct has its own site intensity map in the appendix of Part 14.6 with two basic site intensity zones, Areas 1 and 2. Within Area 1, the MTFAR are the same or similar to the maximum provided for the western side of Queen Street (BFAR 6:1 and MTFAR 13:1/11:1).

This measure is designed to “encourage tower height in exchange for reduced building bulk. This is a form of development which would not be compatible with the relatively low scale form of development proposed in Precinct Area 2.”²¹ Within most of Area 2 of the Precinct, the floor area ratio is limited to the gross floor area within the existing scheduled heritage buildings. It is commented in the district plan that the average total floor area ratio of approximately 6:1 within Precinct Area 2 “has been set in order to retain the Precinct’s strong heritage character and the sense of intimacy imparted by the heritage buildings.”²² Further, the absence of MTFAR for the existing heritage buildings enables “some flexibility for internal alterations within the inherent constraints of each heritage building.”²³

20 Robert McClean ‘Regulation and Incentives for Historic Heritage, Theoretical and Legislative Overview, Historic Heritage Research Paper No.6 (draft working paper), NZHPT, 22 February 2010.

21 Rule 14.6.7.2, Part 14.6 Britomart Precinct, Auckland City Central Area Plan.

22 Ibid.

23 Ibid.

The site intensity zonings of Auckland City Central Area District Plan are the foundation for the bonus floor area regime which is a form of TDR described below.

In July 2010, the Auckland Council notified Plan Modification No. 42 to the Central Area section of the District Plan. This plan change made some significant changes to the bonus floor area system of Auckland City. In particular, the plan reduced the number of bonus features and increases the bonus floor area provided for heritage floor space. The bonus floor area system is currently under review as part of the preparation of the new Auckland Unitary Plan.

The Christchurch City Plan included potential scope for a heritage floor space bonus by providing for the floor area of any retained heritage buildings to be excluded from the permitted plot ratio for the site up to a stated maximum for developments in certain zones.²⁴

Evaluation of the efficiency and effectiveness of plot ratios/site intensity zoning

Costs	<p>The costs of specified permitted use provisions to owners include the The costs to owners and developers of compliance with site intensity zoning requirements and forgone development opportunities.</p> <p>The cost of site intensity zoning to the community involves the implementation and management of the site intensity zoning regime and any development opportunities that are restricted by the regime.</p>
Benefits	<p>The benefits of site intensity zoning are certainty to the owner about the scope and potential for development on a particular site.</p> <p>The benefits of site intensity zoning to the community which reduce the potential demand for adverse development of a heritage property and provide greater certainty over the form of urban development.</p>
Transparency and clarity	<p>Site intensity zoning can involve complex formulae that may make it difficult for the general public to understand and comprehend the intention behind the zoning.</p>
Manageability	<p>Site intensity zoning requires intensive territorial authority management systems.</p>
Legitimacy	<p>Site intensity zoning generally enjoys political support if there is a strong rationale for the regulation.</p>

²⁴ Christchurch City Plan, Vol 3, Part 3 Business Zone, 7.1.6.

Evaluation of the efficiency and effectiveness of plot ratios/site intensity zoning

Comment	<p>The full environmental effects associated with site intensity zoning requires consideration.</p> <p>Site intensity zones are generally designed to manage demand for inner-city commercial development. The incentive may not be effective in areas of low development demand.</p> <p>It is important that site intensity zones do not encourage the loss of significant interior heritage fabric by the maximisation of floor area ratios within heritage buildings.</p> <p>Site intensity restrictions should be accompanied by bonus floor area incentives for heritage buildings.</p>
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3.6. Bonus floor area TDR

3.6.1 Former Auckland City bonus floor area TDR

Site intensity regulation can be accompanied by bonus floor area ratios as a TDR. The Auckland City Central Area District Plan is the only district plan in New Zealand that maintains an active TDR system with regard to bonus floor area provisions. Bonus floor areas are available where a development incorporates a number of ‘public good’ features.

The former Auckland City Council introduced TDR as a variation to its Third Review of the District Scheme in December 1987 under the Town and Country Planning Act 1977. The scheme was continued under the RMA 1991 and the Auckland City Central Area District Plan included a range of bonus floor area provisions involving public good features: accommodation, pre-school facilities, rest rooms, cycle parking, amenities, plaza, landscaping, works of art, heritage floor space and pedestrian facilities. The scheme was revamped by Plan Modification No.42 in 2010. This plan change amalgamated some activities and removed landscape and amenity areas from the bonus floor area provisions.

Obtaining a heritage floor space bonus is a restricted discretionary activity and the use or transfer of a heritage floor space bonus is a restricted controlled activity. Prior to Plan Modification No.42, heritage floor space bonus was a restricted controlled activity.

The bonus floor area is available in locations set out in Planning Overlay Map 5 of the district plan comprising most of the core CBD of Auckland City. The heritage floor space bonus may be granted by Council in relation to buildings of heritage value listed in Appendix 1, Schedule D of Part 6 – Development Controls of the district plan. This schedule comprises most of the core CBD heritage buildings listed in the plan that are in private ownership. The list is mostly comprised of commercial buildings, but includes some apartments, former public buildings and churches. The heritage floor space bonus is designed for two primary matters:

- ▶ Compensation for the loss of development potential that arises as a consequence of the building being scheduled for heritage purposes.

- ▶ Compensation for the cost of conservation.²⁵

The sum of the bonus is calculated by a formula that includes:

- a. Area of heritage floorplate.
- b. Development potential multiplier.
- c. Gross floor area of the scheduled building.
- d. Heritage schedule point ranking.

The ‘development potential multiplier’ is an estimated average development potential based on the relevant development controls applicable to the area within which the heritage building is located. This multiplier and the point ranking is listed for each scheduled building in Appendix 1, Schedule D of Part 6. Essentially, schedule point ranking reflects the significance of the building. Greater heritage floor space bonuses are potentially available for the more significant buildings with higher development potential multipliers.

If consent is granted by Council, the calculated amount of heritage floor space bonus may be ‘sold’ by private agreement from a donor site to a recipient site(s) or used within the site of a scheduled building. The transfer of this bonus is a restricted controlled activity. Council usually require a conservation plan to be prepared for the donor heritage building. If the building is already subject to an approved conservation plan, the gross floor area of the heritage building is excluded from the floor area ratio calculations. Council maintains a register of heritage bonus floor space which includes:

- ▶ The address and legal description of the donor site.
- ▶ The address and legal description of the recipient site(s).
- ▶ The area of heritage floor plate on which the scheduled building is situated and the amount of heritage floor space obtained from the floor plate.
- ▶ The amount of bonus floor space transferred to the recipient site(s) or used within the site of scheduled building, the date of the transfer or use, and the residual floor area remaining after the transfer or use.²⁶

Since the introduction of the heritage floor space bonus provisions, there have been 18 granted applications (see Appendix 7). The bonus properties have included the Bluestone Store, Eden Hall, Civic Theatre, Town Hall, St Andrew’s Church, St Paul’s Church and St Mathews in the City. Council-owned buildings had a prominent role in the early development of the scheme, and by 2004 over 50 percent of the heritage floor space bonuses were owned by Council.²⁷ As an example, Council held potentially 105,000 m² in the ownership of former Chief Post Office building. This building became the primary focus of the Britomart Project and some 31,882 m² of the bonus was sold for development. The transaction was criticised in the media over a number of years for lack of transparency and

²⁵ Rule 6.7.2.5, Auckland City Central Area Plan.

²⁶ Ibid.

²⁷ ‘Transferable Development Rights’, Report to the Finance and Corporate Business Committee, Auckland City Council, 10 September 2004.

for allowing development in excess of the standard building rules.²⁸ As a result, during the review of the Central Area District Plan, the rule was changed so that Council could no longer obtain heritage floor space bonus from its own properties.

Since the early 1990s, the demand for heritage floor space bonus has declined. A key issue is that the heritage floor space bonus is just one of a number of other bonus elements in the district plan. This means that the heritage floor space bonus must compete with other bonus elements such as accommodation, plaza and works of art. Plan Modification No.42 sought to address this issue by removing landscape and amenity works from the scheme.

In addition, the demand for heritage floor space bonus is dependent on consent applications for new development. Consequently, the price of the heritage floor space bonus has dropped from a range of \$230-\$350 m² to approximately \$50 m² (2004).²⁹ As an example, in November 2001, St Matthews in the City was granted resource consent to restore the church and received a heritage floor space bonus of 28,229 m². A bonus of 310 m² was transferred to the Auckland Drape Company Ltd site for an 11-apartment floor tower. The heritage floor space bonus was sold for \$107/m² plus GST. St Matthew's have retained a bonus of 27,919 m².³⁰ By 2004, the church had sold a further lot of bonuses for \$60/m² for the PriceWaterhouseCoopers Building on Quay Street. However, it was noted at the time that the building could have been permitted using the Light & Outlook bonus and the BFAR, without the need for the additional heritage floor space bonus from St Mathews in the City.³¹

George Farrant provides a summary of the advantages and disadvantages of TDRs associated with the Auckland City bonus floor area scheme:

Advantages:

- ▶ Operates as an effective counter to the very real constraints of robust protection of small-scale heritage in a high-density area.
- ▶ Compensates effectively for the acceptance of strong heritage controls, such as 'prohibited activity' status for demolition of 'Category A' (highly-ranked) heritage properties in Auckland's CBD.
- ▶ Is a low-cost incentive solution.
- ▶ Is normally an effective advocacy mechanism and a shield against claims of inequitable loss to an owner.
- ▶ May be applicable to donor sites in larger local centres as well as central high-density areas.

28 Ibid; NZ First Media Release, 17 March 2005, www.nzfirst.org.nz

29 'Transferable Development Rights', Report to the Finance and Corporate Business Committee, Auckland City Council, 10 September 2004.

30 *The Bob Dey Property Report*, 7 November 2001, www.bdcentral.co.nz

31 'Transferable Development Rights', Report to the Finance and Corporate Business Committee, Auckland City Council, 10 September 2004. A further example involved two terrace houses on Airedale Street and the Bluestone Store in Durham Lane. These were awarded heritage floor space bonuses of 853 and 3,035 m² respectively. Part of this bonus (2,127 m²) was sold to the owners of the Durham Street West Parking Building in 2001. Most of this bonus was later transferred to another recipient site on Turner Street. The Bob Dey Property Report, 17 October 2001, www.bdcentral.co.nz

- ▶ May be usefully applicable to non-built heritage sites, such as ecological or archaeological.

Disadvantages:

- ▶ TDRs are a commodity, and therefore their market value fluctuates, particularly if supply exceeds demand (or when uptake demand is low, such as at present).
- ▶ Consideration needs to be given as to whether TDRs are contingent on a development proposal which offers conservation/restoration, or are able to be claimed in the absence of any development proposal.
- ▶ TDR value will be depressed if other bonuses exist that deliver developer's requirements for floor space, without the need to purchase TDRs.
- ▶ Large heritage sites in public ownership can easily flood the TDR market and depress value and effectiveness.
- ▶ Care needs to be exercised in having recipient sites beyond central areas due to public sensitivity about suburban intensification.
- ▶ Can be difficult to monitor if a free-market TDR situation reigns, so issues arise about closer local authority control of the commodity, such as the authority possibly acting as 'banker', controlling prices, and maintaining market stability.³²

George Farrant also notes that the "transferred floor space must only be donated to a site that has the capacity to accept the extra area without breaking any other non-negotiable district plan rules, e.g. sunlight preservation height limits or view shaft protection."³³

The Auckland City bonus floor area TDR system is currently under review as part of the preparation of the new Auckland Unitary Plan.

As outlined in the associated research paper,³⁴ TDR schemes have been attempted by other urban areas in New Zealand with limited success. In Australia, the most well-known TDR scheme is the City of Sydney which has a heritage floor space credit scheme. For this incentive, a credit is awarded following the completion of conservation work on a heritage property. Once the works have been completed to the Council's satisfaction, the floor space can be sold/exchanged to enable additional floor space to be built in a new development.

³² George Farrant, 'Incentives – The Auckland Experience' Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

³³ Ibid.

³⁴ Robert McClean 'Regulation and Incentives for Historic Heritage, Theoretical and Legislative Overview, Historic Heritage Research Paper No.6 (draft working paper), NZHPT, 22 February 2010.

Evaluation of the efficiency and effectiveness of bonus floor area TDR

Costs	<p>The costs to owners and developers includes compliance with site intensity zoning requirements, conservation of historic properties, including preparation of a conservation plan and the TDR process.</p> <p>The cost of a bonus floor area TDR to the community includes the management of the TDR scheme and potential effects of excessive site intensity developments on recipient sites. The public may express concerns about recipient sites beyond the CBD in relation to suburban intensification.</p>
Benefits	<p>The benefits of a bonus floor area TDR to the owner is the potential for an incentive to be obtained by the transfer of the bonus. It assists in the protection of small-scale heritage buildings in high-density areas.</p> <p>The benefit of bonus floor area TDR to the community is the conservation of historic properties in the inner city. As the TDR does not involve a grant or other payment, it is a low-cost incentive option.</p>
Transparency and clarity	<p>Bonus floor area TDRs can involve complex formulae that may make it difficult for the general public to understand and comprehend the intention behind the scheme.</p>
Manageability	<p>Bonus floor area TDRs requires intensive territorial authority management and monitoring systems.</p>
Legitimacy	<p>Bonus floor area TDR may lack political support if there is public opposition to bonus-related development on recipient sites.</p>

Evaluation of the efficiency and effectiveness of bonus floor area TDR

Comment	<p>The full environmental compensation implications of a proposed bonus floor area TDR require consideration, including the cumulative effects on the environment. A total conservation benefit assessment is required to evaluate the overall benefit to the city with regard to restoration of the individual heritage building and the effect on the streetscape or townscape in terms of urban design.</p> <p>Covenants are required to ensure that conservation lots are subject to continual care and maintenance. There is a risk that funds generated by bonus floor area TDRs are not invested into the care and maintenance of the property and are potentially subject to ‘demolition by neglect’.</p> <p>Demand for bonus floor area TDRs is associated with general demand for property and development. The incentive may not be effective in times of recession. Owners of bonus floor area TDRs may find them difficult to sell.</p> <p>Demand for a heritage-related TDRs may be affected by other bonuses that are available which may deliver the developer’s requirements for floor space</p> <p>Large heritage sites in public ownership can ‘flood’ the TDR market and depress value and effectiveness.</p> <p>Strong and robust heritage rules are required that regulate demolition, relocation, new buildings and roof-top additions.</p>
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3.7. Contributions

The RMA provides for financial contributions, including bonds and reserve contributions, and the Local Government Act 2002 provides the regulatory basis for development contributions. Both contributions can be designed to encourage positive heritage outcomes.

3.7.1 Financial contributions

Section 108 of the RMA provides that financial contributions may be made as part of conditions of resource consents. The term ‘financial contribution’ means:

- a. Money; or
- b. Land, including an esplanade reserve or esplanade strip (other than in relation to a subdivision consent), but excluding Maori land within the meaning of the Maori Land Act 1993 unless that Act provides otherwise; or
- c. A combination of money and land.³⁵

³⁵ Section 108(9), RMA 1991.

A financial contribution must be imposed in accordance with the purposes specified in the plan or proposed plan (including the purpose of ensuring positive effects on the environment to offset any adverse effect), and the level of contribution is determined in the manner described in the plan or proposed plan.³⁶ Land, in the form of reserve contributions, may also form part of subdivision consent conditions.

In addition, the RMA allows local authorities to require a bond as part of a consent condition. The purpose of a bond is to secure the ongoing performance of conditions relating to long-term effects, including alterations, removal of structures, remedial works, restoration, maintenance work and monitoring of long-term effects.³⁷

Policies for financial contributions, including bonds and reserve contributions, in regional and district plans can provide protection for historic heritage. As a basic requirement, the regulatory provisions should provide the flexibility to waive any required financial contribution in relation to a heritage-related application. Further, the plan should state that a monetary contribution will not be required where land is set aside in perpetuity, under a covenant, for the conservation of heritage values.

3.7.2 Financial contributions for historic heritage

Many district plans in New Zealand include historic heritage matters in financial contributions provisions (see Appendix 2). The most common is the provision that financial contributions will not be required when land is set aside as a conservation lot or reserve for the conservation of heritage values.

Objectives and policies for financial contributions should refer to historic heritage matters. As an example, Policy RCP5 of the Hastings District Plan states “where a heritage site (such as an archaeological site or a wāhi tapu) has been set aside, either as a reserve, a conservation lot or consent notice as part of a subdivision, this will be taken into account when assessing any reserve contribution for the subdivision.”

The Far North District Plan (Rule 14.4.1) states that a financial contribution in the form of land will be preferred where that land has “important natural, amenity, heritage or cultural values that should be protected.” The plan further states that “where any person wishes to protect, conserve or restore a scheduled heritage resource, and in doing so is required to pay a financial contribution, consideration will be given to the reduction or waiving of that contribution” (Rule 14.6.3).

³⁶ Section 108(10), RMA 1991.

³⁷ Section 108A, RMA 1991.

The Auckland City Isthmus District Plan provides environmental and heritage financial contributions (clause 4B.7.4) to remedy or mitigate the adverse effects of a development and use the financial contribution for the benefit of heritage or environmental features in the vicinity or elsewhere in the city. This policy means a contribution is required for all new development that is either land or cash (or any combination of the two). The amount of the contribution is based on a case-by-case assessment. The Auckland City Central Area District Plan also provides for an exemption from financial contributions where a heritage property is the subject of an approved conservation plan (Rule 10.4.2). This provision is also provided for in the Auckland City Isthmus District Plan.

The Gisborne Combined Regional Land and District Plan waives financial contributions totally or in part for the adaptive reuse of an item and the waiving of reserve contributions either totally or in part (Rule 3.11.2).

3.7.3 Development contributions

‘Development contributions’ are provided for under subpart 5 of Part 8 of the Local Government Act 2002. They allow territorial authorities to compulsorily require those who create demand for new or enlarged community facilities to pay the capital costs of providing them. Community facilities are reserves, community infrastructure and network infrastructure (roads, transport, roads, wastewater, stormwater). Development contributions are managed under a development contributions policy as part of the Long Term Plan (LTP) and can give effect to the principles of the Local Government Act 2002 outlined in section 14. Development contribution policies are also prepared under subpart 3 which relates to financial management and strategy.

Development contributions can only be required when an individual development creates demand for new capital expenditure. For this reason, these contributions are not a uniform charge and cannot be adopted for maintenance costs. The Local Government Act 2002 provides three statutory ‘triggers’ for requiring a development contribution for any given project:

1. It is a development within the meaning of section 197.
2. The development, which either alone or in combination with other development will have the effect of requiring expenditure on infrastructure (section 199).
3. The contribution is provided for in the Council’s development contribution policy (section 198(2)).³⁸

Historic heritage is a relevant matter with regard to development contributions. The justification for consideration and inclusion of historic heritage matters includes:

³⁸ *Neil Construction Limited and others v North Shore City Council* (unreported, High Court, Auckland, CIV 2005-404-4690, 21 March 2007, Potter J), para 116.

- ▶ Historic heritage can provide for social, economic and cultural interests of people and communities and enhance the quality of the environment.
- ▶ The development of historic heritage involving adaptive reuse of historic buildings is an important community outcome and has been identified in numerous community outcome strategies.
- ▶ Historic areas, precincts and landscapes may form an identifiable part of the community.
- ▶ Development in historic areas, involving the adaptive reuse of existing historic townscapes, provides a basis for urban renewal and can maximise the use of existing infrastructure and services.

On this basis, development contribution policies should provide a credit incentive for development that involves the adaptive reuse of historic areas and precincts. As stated in Local Government New Zealand’s guidance:

Broadly, credit should be given for any works or services provided by the developer which appropriately reduce the demand for works or services to be provided by the Council. One should reduce or exempt those special cases where the effects of development can be shown to be less than standard units of development or nil.³⁹

The Wellington City Council has adopted an equivalent household units (EHU) credit approach which provides an incentive for infill residential subdivision, residential development of a CBD site, additional bedrooms to a one-bedroom household unit, additional household units and development within the Northern Growth Area. Auckland Council provides an exemption for all alterations and additions to existing residential dwellings.

This approach can be adopted for historic areas and precincts as specific catchment areas in a development contributions policy. Councils can consider the provision of an EHU credit for consent applications that involve the adaptive reuse of historic buildings, including earthquake strengthening and change of use applications under the Building Act.

Historic heritage can also form part of hypothecation (targeted) funding from development contributions.⁴⁰ It is particularly important that development contribution policies ensure funding is targeted to establishing historic reserves and other heritage-related open space areas and maintaining them in the long term. Development contribution funding can also assist to upgrade and maintain existing historic public buildings and services, including earthquake strengthening. In Auckland City, the restoration and expansion of the Auckland Art Gallery was funded, in part, by development contributions.

³⁹ Local Government NZ, *Best Practice Guide to Development Contributions*, 2003, p 39.

⁴⁰ ‘Hypothecation refers’ to a tax or fund where a certain portion is tagged or allocated to a specific, usually a popular, cause. Theoretically, people will be willing to pay more in taxes if they believe a certain amount is going towards a cause they believe in. Report of the Local Government Rates Inquiry, Funding Local Government, August 2007, p 274.

Note. Development contributions are currently under review by the Government – see the discussion paper on the Department of Internal Affairs website.⁴¹

Evaluation of the efficiency and effectiveness of contributions

Costs	<p>The costs to developers involve financial charges and the provision of reserves.</p> <p>The cost of contributions to the community includes the management of contributions, monitoring and enforcement.</p>
Benefits	<p>The benefits of contributions mean that development can be provided with an incentive to invest in existing historic townscapes to facilitate adaptive reuse.</p> <p>They can be designed to benefit a particular historic area or precinct.</p> <p>The benefits may also involve the establishment and maintenance of public space and facilities for historic.</p>
Transparency and clarity	<p>Contributions are transparent and have clarity for developers and the public.</p>
Manageability	<p>The management framework for contributions is provided for in the RMA and Local Government Act 2002.</p>
Legitimacy	<p>If supported by a strong rationale and research, contributions for historic heritage should obtain political support.</p>
Comment	<p>The use of financial contributions for historic heritage under the RMA is well established and can result in substantial benefits.</p> <p>While having potential, the use of development contributions for historic heritage is generally untested in New Zealand with the exception of community heritage projects that have benefited from development contribution funding.</p> <p>Development contribution credits should not provide an incentive to demolition or relocation. They must be limited to adaptive reuse of historic buildings, involving appropriate alterations and additions (including earthquake strengthening) and change of use.</p>

⁴¹ Department of Internal Affairs, *Development Contributions Review Discussion Paper*, February 2013.

3.8. Consent fees

Section 36 of the RMA empowers local authorities to fix a range of charges for matters relating to plans, policies and consents. This power is exercised in accordance with section 150 of the Local Government Act 2002. This section means that fees may be prescribed by bylaw or using the special consultative procedures of the Act.

A bylaw may provide for the refund, remission or waiver of a fee in specified situations or in situations determined by the local authority.⁴² Section 36(5) also allows, a local authority, in “any particular case and in its absolute discretion, to remit the whole or any part of any charge of a kind.” The Building Act contains similar powers for territorial authorities to impose fees or charges with respect to building consents.

Resource consent fee waivers for historic heritage is a relatively common form of incentive adopted in New Zealand. As outlined in Appendix 3, a large number of local authorities have some form of consent fee waiver policy for historic heritage. This policy is often included in the district plan or as part of Council’s general policy framework under the Local Government Act 2002.

The resource consent fee waiver should provide an incentive to undertake changes to historic heritage and a disincentive to inappropriate changes such as relocation and demolition. The fee waiver should be designed, therefore, to apply to activities such as:

- ▶ Repair and maintenance when this work requires a resource consent.
- ▶ Earthquake strengthening.
- ▶ Works to comply with the Building Act such as physical access and fire safety.
- ▶ Creation of conservation lots by subdivision.
- ▶ Works that comply with the provisions of a relevant conservation plan.
- ▶ Alterations that are appropriate (including adaptive reuse) as assessed by a heritage professional.

In addition to a fee waiver, an increased fee could be charged for consents that involve demolition or destruction of listed historic items as a disincentive.

Evaluation of the efficiency and effectiveness of fee waiver

Costs	The costs to local authorities of the fee waiver.
Benefits	The benefit of fee waivers is to provide an incentive for owners to carry out appropriate changes to historic buildings, including alterations, retrofit of buildings and earthquake strengthening.
Transparency and clarity	Fee waivers are transparent and have clarity for the public.

⁴² Section 150(2), Local Government Act 2002.

Evaluation of the efficiency and effectiveness of fee waiver

Manageability	The management framework for fee waivers is provided for in the RMA, Building Act and Local Government Act 2002.
Legitimacy	Fee waivers generally have political support.
Comment	<p>The use of fee waivers for historic heritage under the RMA is well established.</p> <p>Fee waivers should not provide an incentive to demolition or relocation. They must be limited to appropriate changes to heritage buildings (including earthquake strengthening) and change of use.</p>

3.9. Building Act 2004: alterations and change of use

The Building Act regulates all building work in New Zealand. Building work includes making changes to buildings such as alterations, additions, relocation and demolition. Under section 112(1) a building consent authority must not grant a building consent for the alteration of an existing building, or part of an existing building, unless the building consent authority is satisfied that, after the alteration, the building will—

- a. comply, as nearly as is reasonably practicable, with the provisions of the building code that relate to—
 - i. means of escape from fire; and
 - ii. access and facilities for persons with disabilities (if this is a requirement in terms of section 118); and
- b. continue to comply with the other provisions of the building code to at least the same extent as before the alteration even if no other significant building work is being undertaken at the same time. All alterations to existing buildings must comply as nearly as is reasonably practicable with specific provisions of the building code.

The compliance test of ‘as nearly as is reasonably practicable’ means there is some flexibility in approaching alterations as a territorial authority may allow the alteration of an existing building, or part of an existing building, without the building complying with provisions of the building code. The territorial authority, however, must be satisfied that — (a) if the building were required to comply with the relevant provisions of the building code, the alteration would not take place; and (b) the alteration will result in improvements to attributes of the building that relate to—(i) means of escape from fire; or (ii) access and facilities for persons with disabilities. For this provision to apply, the territorial authority needs to be convinced that the fire escape and access improvements outweigh any detriment that is likely to arise as a result of the building not complying with the relevant provisions of the building code.

In addition to alterations, the Building Act regulates the change of use of buildings. Under section 114, in cases of change of use that involves the creation of new one or more household units, the territorial authority must be satisfied, on reasonable grounds, that

the building, in its new use, will comply, as nearly as is reasonably practicable, with the building code in all respects.⁴³

Building Act-related provisions can present significant challenges for the adaptive reuse of heritage buildings. Common obstacles can involve situations such as:

- ▶ Retrofit work for improving structural performance (earthquake strengthening) for individual heritage buildings and historic precincts.
- ▶ The conversion of commercial buildings to residential or other uses.
- ▶ The adaptation of buildings to provide for new physical access, and fire safety requirements.

Managing Building Act-related heritage buildings issues requires a strategic approach by local authorities. First, there must be strong connections between building consent staff and policy within councils. It is important that local authorities have a 'united front' when dealing with heritage buildings under the Building Act.

Local authorities should use the full range of incentive-based tools for managing heritage-related building issues. These tools will involve:

- ▶ In-house training for Council staff on dealing with heritage building issues.
- ▶ Public information, advice and guidance about managing changes to heritage buildings under the Building Act.
- ▶ Use of heritage professionals to provide advice on heritage building projects.
- ▶ Adoption of best practice alternative solutions to achieve heritage and safety objectives.
- ▶ Preparation of conservation plans to guide adaptive reuse of individual buildings and groups of buildings.
- ▶ Targeted funding assistance, especially for earthquake strengthening, fire safety and physical access-related work.
- ▶ Project management approach for historic precincts and areas as 'special development areas' using a master or structure plan involving owners, building officials, and Council policy planners, incorporating earthquake-prone risk assessments.

The NZHPT has published a separate guide to the Building Act as part of the Sustainable Management of Historic Heritage Guidance Series. This guide provides an explanation of matters such as heritage-related terms, project information memorandum and notification, building consents and general guidance for making changes to heritage buildings.⁴⁴ The NZHPT has prepared further technical guidance for improving physical access and fire safety.

⁴³ It is noted that the provisions of the Building Act for waivers and alternative solutions only apply to new building work and building code compliance. For alterations and change of use, waivers and alternative solutions do not apply since the work does not require this compliance. Instead, alterations or change of use must comply to a level that is 'as nearly as is reasonably practicable'.

⁴⁴ NZHPT, *Sustainable Management of Historic Heritage Guidance Series*, Guide No.6, 'Building Act 2004', August 2007.

4. Non-regulatory incentives

4.1. Private-public partnerships

Private-public partnerships (PPPs) come in a wide variety of types and forms. In most PPPs there is some degree of shared responsibility for funding and management involving a collaboration of private interests and government.

PPPs for historic heritage include a range of non-profit trusts, organisations and corporate agencies. Overseas, PPPs are becoming a common approach for historic heritage, especially for the revitalisation or adaptive reuse of large abandoned historic buildings or economically depressed areas. As part of a review of European heritage initiatives commissioned by the Helsinki University of Technology, Donovan D. Rypkema provides a list the common denominators for successful heritage PPPs:

- ▶ The heritage building is identified as a community asset regardless of who actually holds title to the property.
- ▶ There is a core group who initiates the action which often comes from the non-government organisation (NGO) sector.
- ▶ There is an imaginative catalyst to move the redevelopment idea forward. This may come from the business community, local government, an NGO or elsewhere, but rarely from the current owner of the property (even if that owner is a level of government).
- ▶ There is broad-based support for the project within the local community that spans horizontally sector and political interests.
- ▶ There is always public sector participation, including from levels of government that are not directly involved as the formal public partner.
- ▶ There are multiple sources of financing from traditional private sector, non-traditional and public institutions.
- ▶ There is a commitment on all parties to be willing to be as flexible as possible in use, financing, timing and particulars of the transaction until a mutually acceptable and feasible alternative scenario is developed. This requires both compromise and patience from all partners. Even the most successful heritage PPPs tend to experience significant public scepticism during the process.⁴⁵

Further information about heritage PPPs is available online in the Helsinki University of Technology study.⁴⁶

In New Zealand there are many examples of heritage PPPs. One of the most high profile and successful projects is the Britomart Transport Centre in Auckland. While the project was highly controversial during the late 1990s, the Britomart Transport Centre was opened

⁴⁵ Donovan D. Rypkema and Caroline Cheong, *Public-Private Partnerships and Heritage: A Practitioner's Guide*, Heritage Strategies International, January 2012.
Economics and Built Heritage – Towards New European Initiatives, Centre for Urban and Regional Studies Publications, Helsinki University of Technology, 2008.

⁴⁶ <http://lib.tkk.fi/Reports/2008/isbn9789512293971.pdf>

in 2003 as a result of substantial public and private investment and partnership, with the cornerstone achievement being the restoration of the Chief Post Office building.⁴⁷

In provincial New Zealand, the most common PPPs for historic heritage is the ‘main street’ model. In this model, main streets and town centres are actively managed by the collaboration of business owners by the contribution of funds or targeted differential rates. These funds are used to promote and market the town centre and maintain a management structure by the employment of a town centre manager. The model is promoted by organisations such as members of the Town Centres Association of New Zealand and Towns and Cities New Zealand. The structure is also often facilitated and part-funded by local authorities.

The main street model has significant advantages for the management of historic town centres. Town centre managers provide an important link between business owners, Council and the community. Often these managers can facilitate funding applications for, and on behalf of, owners of historic commercial buildings. By promoting local business investment, town centre managers can make a significant contribution to the ongoing use and maintenance of historic commercial buildings.

Pride in Putaruru

Pride in Putaruru is a non-profit town centres association established by the community. It promotes the town centre of Putaruru in a large number of ways, including a website, blog-site and newsletter.⁴⁸ By encouraging local business investment, Pride in Putaruru has made a valuable contribution to the long-term maintenance and use of historic commercial buildings in the town. The organisation is promoting further benefits to the heritage of Putaruru by the establishment of heritage trails, festivals and improving historic shop facades.

Pride in Putaruru employs two full-time staff (manager and assistant). Funding for it comes from business owners, the South Waikato District Council and community grant applications. The organisation has assisted with the development of a Putaruru Concept Plan which provides a shared vision for the future of the town.

⁴⁷ <http://www.britomart.co.nz/history1.html>

⁴⁸ <http://www.putaruru.co.nz/>

4.2. Heritage grants and loans

Heritage grants take three main forms: entitlement grants, discretionary grants and performance grants. The Australian National Incentives Taskforce provides the following explanation of the three main types:

[Entitlement grants are] given to any owner whose property meets pre-set eligibility criteria. Equal benefits are paid to all, not discriminating between those managing their properties to a high standard and those that simply meet the criteria. Recipients are not generally required to spend the grant on conservation works.

Discretionary grants have flexible guidelines and applicants must compete for selection. Typically, a grant assessment committee or board determines the most worthy projects to be funded.

Performance grants operate with strict criteria that define the types of conservation project that will be supported (e.g. structural repairs, external restoration).⁴⁹

Heritage grants are the most common non-regulatory incentive offered in New Zealand, and most of these are discretionary-type grants. Heritage grants are provided by a large number of territorial authorities. Most funds are relatively small and individual grant amounts are often between \$5,000 to \$10,000. Some of the largest funds are the Auckland Council Built Heritage Protection Fund, Wellington City Council's Built Heritage Incentive Fund and the Canterbury Earthquake Heritage Buildings Fund.

Some local authorities also provide performance grants for specific types of work. The most common in New Zealand are grants for façade enhancement or purchase of paint.

In addition to the territorial authority heritage grants, Bay of Plenty and Southland regional councils provide regional heritage grant schemes. The Southland Regional Heritage Development Fund is unique as it involves both Environment Southland and the three territorial authorities as a joint initiative.

A list of local authority heritage grants available in New Zealand is outlined in Appendix 4.

The only other specific heritage grant fund available for private owners of historic heritage, or groups who are not eligible to the Lotteries Board Heritage Grant Fund, is the National Heritage Preservation Heritage Incentive Fund managed for the Crown by the NZHPT. Individual grants cover 50 percent of conservation work (including repairs, earthquake strengthening and fire protection) to a maximum of \$100,000. The fund is only available to private owners of Category 1 historic places (or those places that satisfy the requirements for Category 1), wāhi tapu or wāhi tapu areas registered under the Historic Places Act 1993.⁵⁰

While heritage grant schemes are the most widespread form of non-regulatory incentive for historic heritage in New Zealand, they can be affected by a number of issues, including:

49 National Incentives Taskforce for the EPHC, *Making Heritage Happen: Incentives and Policy Tools for Conserving our Historic Heritage*, February 2004, pp16–18.

50 <http://www.historic.org.nz/en/ProtectingOurHeritage/FundingProtection.aspx>

- ▶ As indicated in Appendix 4, grant assistance is not available in all parts of New Zealand. Generally, there are more grants available in the North Island, especially Northland, Auckland, Bay of Plenty and the Waikato. Elsewhere, assistance to owners is ‘patchy’.
- ▶ Information about available grants can be difficult to obtain. Some local authorities do not advertise the grants by not providing public information on websites or using information sheets and brochures.
- ▶ Many owners of historic heritage are unwilling to apply for funding assistance. It is the common experience of some local authorities that applications for funding assistance fall short of expectations or anticipated demand. It appears that many owners do not bother applying if the amount of grant available is manifestly too low.
- ▶ Many owners refuse to seek financial assistance because of perceived interference with property rights and wish basically to be ‘left alone’. Also they may not submit applications to avoid ‘paper work’ or associated conditions to funding assistance such as public access provisions or covenants.
- ▶ Grants often do not provide solutions to situations of building abandonment (demolition by neglect) when owners either do not have other funds available for repair works or simply refuse to take care of a place.
- ▶ Grants do not provide solutions to ‘orphaned buildings’ when owners cannot be identified or contacted.

Best practice guidance for the design and management of a local authority heritage grants scheme is outlined in Appendix 1.

As indicated in Appendix 1, funds should also be made available for emergency situations. This should be tagged as an ‘Emergency Heritage Contingency Fund’ to allow for “moderate, but urgent expenditure in the public interest to cope with or secure an unexpected situation involving an item of heritage interest.”⁵¹

4.2.1 Heritage loans

Loans can be in the form of direct loans or loan subsidies. Generally direct loans are made to “property owners at a lower interest rate that would be commercially available.”⁵² In the case of loan subsidies, the ‘loan finance is supplied by a commercial lender, while the interest rate ‘gap’ is funded by the organisation giving the loan.

Heritage-related loans are uncommon in New Zealand, and only a few local authorities indicate that it may be possible for owners to obtain a low-interest loan to assist in the repair or restoration of a historic property.

⁵¹ George Farrant, ‘Incentives – The Auckland Experience’ Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

⁵² National Incentives Taskforce for the EPHC, *Making Heritage Happen: Incentives and Policy Tools for Conserving our Historic Heritage*, February 2004, p18.

George Farrant notes that heritage loans can provide larger ‘catalytic’ funding amounts, especially when an owner may not be eligible for traditional loan or grant sources.⁵³ Other advantages of heritage loans may include:

- ▶ Providing larger heritage outcomes and private investment than most heritage grants schemes.
- ▶ Acting as a subsidy (1:1 or otherwise) to an owner’s own fundraising efforts.
- ▶ Contributing towards a revolving heritage fund in the long term.
- ▶ Stimulating goodwill of owners to conserve historic heritage.⁵⁴

George Farrant also notes the disadvantages of heritage loans: they may involve an occasional risk of default, facilitating the opportunity for capital gains (when owners resell the building at a profit and capitalise on the heritage loan); involve relatively high administrative burden; and the real costs of the loan may be less transparent than a simple heritage grant.

Suspensory loan conditions can be adopted to reduce the risk of an owner obtaining significant capital gains arising from a loan. They can also encourage long-time owners to carry out restoration works and retain ownership on a long-term basis. Suspensory loans mean that the repayable amount is set at a sliding scale. The scale may vary according to the period of time following the grant, repayable amount, ownership and individual circumstances. For example, the repayable amount could be reduced to 50 percent after five years conditional on the property being retained by the owner.⁵⁵ In this case, the “loan progressively becomes a grant while ownership remains unchanged.”⁵⁶

53 George Farrant, ‘Incentives – The Auckland Experience’ Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

54 Ibid.

55 Ibid.

56 Ibid.

4.2.2 Grants for earthquake-prone heritage buildings

The risk of heritage loss from earthquake damage is a major issue for New Zealand. Earthquake strengthening work (or improving structural performance) of heritage buildings not only improves public safety, but can create jobs and ensure the survival of historic heritage.

The NZHPT's research for the Canterbury Earthquakes Royal Commission shows that heritage grant schemes and other sources of funding had a major influence in facilitating earthquake strengthening of heritage buildings in Christchurch prior to September 2010.⁵⁷ This resulted in the survival of some heritage buildings of national significance such as the Arts Centre, Canterbury Museum and Christ's College.

The Building Act requires territorial authorities to prepare earthquake-prone buildings policies. In some territorial authorities, this policy framework involves an active approach to the identification and regulation of earthquake-prone buildings.⁵⁸ These provisions are currently under review following the release of the recommendations of the Canterbury Earthquakes Royal Commission.

In addition to research by the NZHPT, the Seismic Retrofit Solutions project at Auckland University has investigated issues relating to earthquake-prone buildings, including heritage.⁵⁹ For example, Temitope Egbelakin, a former PhD student, researched incentives and motivators to enhance seismic retrofit implementation. Her research highlights the need for greater incentives for seismic retrofit in the form of a cost-sharing approach involving government and owners and the provision of low or no-interest loans.

The NZHPT advocates for improved incentives and assistance for owners of earthquake-prone heritage buildings. A new grants and loans scheme is required at a national level not unlike the current EECA ENERGYWISE funding scheme to improve energy efficiency. Another approach would be to allow the cost of strengthening to be claimed as a tax deductible expense in a similar manner to repairs and maintenance, particularly if the works do not improve the capital value of the property.

A grant, tax incentive and/or loans scheme for earthquake-prone heritage buildings would enable targeted assistance to be provided to owners which will create jobs, save lives, and preserve heritage.

⁵⁷ Robert McClean, *Heritage Buildings, Earthquake Strengthening and Damage: The Canterbury Earthquakes September 2010, January 2012*, Report for the Canterbury Earthquakes Royal Commission, 8 March 2012.

⁵⁸ For an overview, see Robert McClean, 'Toward improved national and local action on earthquake-prone heritage buildings' Historic Heritage Research Paper No.1, NZHPT, 3 March 2009.

⁵⁹ <http://www.retrofitsolutions.org.nz/index.shtml>

4.3. Rates relief (including remission, postponement and differential rating)

Rates relief is a property tax abatement. It can involve the “full or partial reduction, freezing, or deferment of property taxes or rates.”⁶⁰ Rating is regulated under the Local Government (Rating) Act 2002 and the Local Government Act 2002. Rates relief can only be adopted if the local authority has provided for this incentive under a rates remission policy or rates postponement policy prepared under sections 109 and 110 of the Local Government Act 2002. Rates remission or rates postponement policies must state the objectives to be achieved and the conditions and criteria for remission or postponement.

An overview of the rating system and a discussion of key rating issues is provided in the Report of the Local Government Rates Inquiry, *Funding Local Government*, August 2007 (the rates inquiry report).⁶¹

The rates inquiry report found that 57 local authorities (67 percent) provide rates remission for land protected for natural, historic or cultural conservation purposes.⁶² Most of these local authorities provide rates relief for heritage-related properties. A list of heritage-related rates remission schemes currently available in New Zealand is outlined in Appendix 5.

It is often unclear, however, about the nature of the local authority rates policy for historic heritage and often there is a lack of certainty if the rates relief applies to urban built heritage as opposed to rural heritage properties protected by covenants. Perhaps, as a consequence of the degree of uncertainty about the application of rates relief to historic heritage, this incentive is not commonly implemented by local authorities to protect and maintain historic heritage.

In 2007, the Wellington City Council commissioned Graham Spargo Partnerships Ltd to examine financial and other means to manage built heritage in the city (the Spargo report).⁶³ The report provides information on a range of incentives for historic heritage, especially rates-relief policies:

Rates postponement means that the payment is not waived, but is delayed until a certain time or trigger event occurs. This event can be a change of use or a change of ownership. Rates postponement enables the money that is postponed to be ‘clawed back’ once a trigger event occurs.⁶⁴

[Rates remissions] A local authority may remit rates on any rating unit, to any extent and for any reason providing that it complies with the policy that has been developed by the council ... A remissions policy can be framed to include criteria

60 Ibid, p 5.

61 www.ratesinquiry.govt.nz

62 Report of the Local Government Rates Inquiry, *Funding Local Government*, August 2007, p 207.

63 Graham Spargo Partnerships Ltd, *Built Heritage Management in Wellington City: Financial and Other Means to Appropriately Manage Built Heritage*, November 2007.

64 Rates postponement is often adopted in cases of financial hardship. “Postponed rates are registered as a statutory land charge on the title of the property. This means when the property is sold, the rates must be paid out of the proceeds before any other debts are settled.” Report of the Local Government Rates Inquiry, *Funding Local Government*, August 2007, p 275.

that need to be met to qualify. For built heritage, this could include ensuring that appropriate and adequate maintenance of buildings is undertaken.

Differential rating has typically been used as a mechanism to distinguish the level of rates paid per dollar of property value by the commercial sector compared with the residential sector.⁶⁵

[Targeted rates] provide funding to meet the cost of a particular function by a specific rate which may or may not be targeted to a particular category of property.⁶⁶

George Farrant also notes that a ‘rates freeze’ can be adopted. For example, such a freeze could be applied at the time of protection of a heritage property or immediately before a development takes place.⁶⁷

The Spargo report provides an assessment of the various rating tools to achieve positive heritage outcomes in terms of advantages and disadvantages. After considering the options, the report recommends that the Wellington City Council offers a rates postponement and rates write-off as a public good contribution to minor (less than \$50,000) built heritage work delivering heritage outcomes and a commercial area rates remission policy which “enables reduced rates for contributing heritage buildings around the CBD in the defined ‘heritage areas’ where owners are maintaining buildings but otherwise leaving them unaltered.” Further, the Spargo report recommends a “residential areas rates remissions policy which enables rates for listed heritage buildings in residential zones where owners are maintaining buildings but otherwise leaving them unaltered.”⁶⁸

The Dunedin City Council is one of the most active local authorities in providing rates relief for historic heritage. In addition to a general non-profit community rates relief scheme, Dunedin has a Targeted Rate Scheme for Earthquake Strengthening of Heritage Buildings. This allows building owners to obtain funding for earthquake strengthening of heritage buildings and to pay this back through a targeted rate on their property. Eligible building owners may obtain amounts of up to \$50,000 to assist with earthquake strengthening. Larger amounts may be considered on a one-off basis. Additional assistance may also be available through the Dunedin Heritage Fund.

Also, the Dunedin City Council has rates relief available to heritage building reuse and strengthening projects. This is typically a 50 percent rebate on the general rate. For example, the owners of the NZ Loan and Mercantile Agency Co building in Thomas Burns Street were granted rates relief in July 2011. The 50 percent rates relief amounted to \$5,244.27 for 2011–2012.⁶⁹ In addition, the Council has established a heritage residential B&B rates category in June 2011. This is available for owners of heritage B&B who were paying commercial rates following assessments by Quotable Value (QV) in 2010.

65 Differential rating can also be based on location, area, use or activities allowed for under the RMA.

66 Ibid.

67 George Farrant, ‘Incentives – The Auckland Experience’ Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

68 Graham Spargo Partnerships Ltd, *Built Heritage Management in Wellington City: Financial and Other Means to Appropriately Manage Built Heritage*, November 2007. Note: Wellington City Council has yet to adopt the recommendations of the Spargo Report in relation to rating.

69 *Otago Daily Times*, 19 July 2011.

George Farrant provides a summary of the advantages and disadvantages of rates relief for historic heritage:

Advantages:

- ▶ Is facilitated by existing legislation.
- ▶ Recognises the maintenance burden to owners in a tangible way.
- ▶ Is transparent and can be publicly debated.
- ▶ Is highly visible to ratepayers via rates notices.
- ▶ Gives the ability to ensure maintenance or ‘claw-back’ rates.

Disadvantages:

- ▶ Costs to administer.
- ▶ Costs to rating income.
- ▶ Difficult to anticipate uptake levels and impact on rates income.
- ▶ Needs to be clearly linked to actual maintenance costs and heritage outcomes.⁷⁰

4.4. Tax relief

Tax-related incentives have proved to be a major influence for the preservation of historic heritage in the United States (see below). New Zealand does not provide a central government tax incentive scheme for historic heritage.

Currently, the only environmental-related tax incentive is under the Income Tax Act 2004, which provides a system of environmental restoration accounts that relate to expenditure by business to avoid, remedy or mitigate the detrimental effects of contaminant discharge.⁷¹ This system could be amended by the Government to provide for the repair and maintenance of historic heritage.

4.4.1 Tax deductible expenses

In the past, owners of commercial properties could claim depreciation as set out under the Tax Administration Act 1994 and the Income Tax Act 2004. As from April 2011, owners will no longer be able to claim depreciation on buildings.⁷²

The ability for owners of commercial properties to claim repairs and maintenance as an allowable deductible expense is available under tax law. Advice should be obtained from the Inland Revenue Department (IRD) or a Chartered Accountant on the types of repair and maintenance works that can be claimed as an allowable deductible expense. Generally,

⁷⁰ George Farrant, ‘Incentives – The Auckland Experience’ Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

⁷¹ Sections CB24B, EK 1–23, Schedule 6B, Income Tax Act 2004.

⁷² While the ability to claim depreciation has been removed, IRD state that provisional depreciation rates will still be able to be set for ‘classes of buildings’. If the Commissioner for Inland Revenue issues a provisional rate for a class of building stating that it has an estimated ‘useful life’ of less than 50 years, owners of affected buildings will be able to claim depreciation deductions: IRD, *Guide to the tax changes proposed in the Taxation (Budget Measures) Bill 2010*, 20 May 2010.

the incentive is limited to repairs and maintenance that are not capital expenditure and the maintenance of assets in same condition as when acquired. Substantial work, over and above maintenance for ‘wear and tear’, is not deductible.

4.4.2 Tax relief for historic heritage in the United States

Tax reforms in the United States have revolutionised the way that developers and private investors think about old buildings. Established in 1976, the Rehabilitation Tax Credit has revitalised countless communities and is internationally recognised for its success. The credit applies to costs incurred for the rehabilitation, renovation, restoration, and reconstruction of historic buildings. The percentage of costs taken as a credit is 10 percent for buildings placed in service before 1936, and 20 percent for certified historic structures.

The credit is available to any person or entity that holds the title for an income-producing property. Expenses that qualify for the credit include expenditure for structural components of a building such as: walls, partitions, floors, ceilings, tiling, windows and doors, air conditioning and heating systems, plumbing, electrical wiring, chimneys, stairs, and other components related to the operation or maintenance of the building. Soft costs such as architect or engineering fees also qualify for the credit.⁷³

The United States Secretary of the Interior established 10 Standards for Rehabilitation which projects must meet to be eligible for the 20 percent Rehabilitation Tax credit. They are:

- A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
- The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
- Each property shall be recognised as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
- Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
- Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterise a historic property shall be preserved.

73 Heritage Canada Foundation *Canada’s Endangered Places Report Card* 19 February 2007.

- Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, colour, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
- Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
- Significant archaeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
- New additions, exterior alterations, or related new construction shall not destroy historic materials that characterise the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
- New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.⁷⁴

In addition to the federal tax incentive, some 30 States of the United States have some form of heritage tax incentive programme.⁷⁵

4.5. Public purchase and revolving acquisitions

Many local authorities have purchased historic properties as key strategic assets for the community. Also, many of these properties have been adapted for public purposes such as meeting rooms, libraries and parks.

In addition to strategic asset purchase, unforeseen circumstances may arise when “the security of a heritage site or item may depend, after all else fails, on purchase by an entity with sufficient resources and conservation motives to do so.”⁷⁶ Considering the significant capital expenditure involved, these circumstances will be exceptional and need to be assessed on a ‘case-by-case’ basis.

⁷⁴ United States National Park Service *A Guide to the Federal Historic Preservation Tax Incentives Program for Income-Producing Properties*
<http://www.nps.gov/history/hps/tps/tax/incentives/index.htm>

⁷⁵ For an overview of State-level tax incentives, see
<http://www.preservationnation.org/resources/find-funding/additional-resources/taxincentives.pdf>

⁷⁶ George Farrant, ‘Incentives – The Auckland Experience’ Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.



Stoneycroft, Hastings

Photo, Alison Dangerfield
NZHPT

Stoneycroft is located on the outskirts of Hastings, Hawke's Bay. The property is registered as a Category 2 historic place under the Historic Places Act 1993 and protected by a heritage covenant and listing in the district plan.

Stoneycroft dates from 1875 and forms part of a historic property with 2.4 hectare grounds containing mature trees. In July 2005, the Hastings District Council purchased the property for community use with the aim of preserving the historic building and the notable trees on the property and fulfilling some of the reserve contributions for the development of the Lyndhurst subdivision. Since purchase, the Council have undertaken extensive repair and restoration of the building and the grounds. Following the completion of these works, Council consulted the community to determine a new future use for the property and the property is now the home to a new digital heritage centre for the Hawkes Bay.

4.5.1 Revolving funds

Revolving funds are a proven method of providing financial and community assistance for historic heritage in Australia and New Zealand. In this country, two successful revolving funds have operated in Christchurch (Christchurch Heritage Trust) and Invercargill (Troopers Memorial Corner Charitable Trust). Auckland Council has recently established a new revolving fund as part of the Auckland Built Heritage Protection Fund.

'Revolving funds' is a pool of capital created and reserved for a specific activity. The capital is used to purchase, restore, sell and reinvest for historic conservation purposes. Basically, the system involves:

1. Establishment of a community trust or incorporated society with financial resources.
2. Acquisition of strategic historic properties by purchase or donation.
3. Repair and restoration of properties.
4. Protection via heritage covenants.
5. Sale or lease of properties to generate further income for other purchases or restoration projects.

As outlined by the Australian EPHC National Incentives Taskforce, revolving funds involve two main challenges:

Firstly, an initial capital injection is required to get the scheme up and running. This can be obtained through government funding (either from general revenue or other sources such as lotteries, bond issues, etc); donations or bequests (cash or property); and fund-raising or borrowings. The second challenge is that management of a revolving fund needs considerable expertise, including real estate, marketing, finance and heritage expertise.⁷⁷

⁷⁷ National Incentives Taskforce for the EPHC, *Making Heritage Happen: Incentives and Policy Tools for Conserving our Historic Heritage*, February 2004, p 23.

4.5.2 The three former miner's cottages, Arrowtown

Arrowtown is an important heritage town and is a significant tourist destination in Central Otago. Research by the Arrowtown Promotion and Business Association indicates that more than 400,000 people from outside the Wakatipu region visit Arrowtown each year.⁷⁸ The majority of the visitors are attracted by the historic streetscapes of the town.

Early miners cottages form a part of the Arrowtown streetscapes. The three former miner's cottages at 59, 61 and 65 Buckingham Street, Arrowtown, were built between the early to mid-1870s out of rudimentary local materials or red beech timber and schist rock. The cottages were owned by property developer Eamon Cleary.⁷⁹ He owned two of the cottages and their sections outright and a third cottage which stood on council leasehold land.⁸⁰ Cleary allowed the buildings to fall into disrepair and had planned a large-scale accommodation complex behind the three buildings incorporating replicas of the historic cottages.⁸¹

After a public outcry about the state of the cottages, Queenstown Lakes District Council purchased the properties for \$1.9 million – including 59, 61 and 65 Buckingham Street, together with 6 Merioneth Street. The purchase was conducted on behalf of the Council by a local developer.⁸² After the purchase of the cottages, the Council called on members of the public to put their names forward as members of a new charitable trust, the Arrowtown Trust, responsible for the future of the buildings. Since its establishment, the trust has raised some \$600,000 from applications to the NZ Lotteries Grant Board and other community funding sources for the restoration of the cottages. The restoration work was completed in October 2011 and the cottages are now venues for a café, art gallery and office space.



65 Buckingham Street, Arrowtown. Photo, Jo Boyd, Riverlea Photography

⁷⁸ 'Arrowtown charm, historic buildings visitor lure: study', *Queenstown Times*, 6 March 2013.

⁷⁹ *Mountain Scene: Queenstown*, 1 February 2007, p 5.

⁸⁰ *Southland Times*, 9 February, 2007, p 1.

⁸¹ *The Dominion Post*, 21 February 2007, p 11.

⁸² *Gisborne Herald*, 10 February 2007, p 13.

4.6. Insurance rebates

Insurance is a system that provides recompense to owners in the event of loss or damage in order that repairs or reinstatement may be financed in whole or part. All heritage places should be covered by adequate insurance. The NZHPT provides guidance on insurance of heritage properties as part of the *Sustainable Management of Historic Heritage Guidance Series*.⁸³



Cuba Street Historic Area,
Wellington
www.cuba.co.nz

Photo, NZHPT

As with general properties, some insurance companies provide discounts or rebates if buildings are maintained to a high standard or safety measures are installed such as:

- ▶ Fitting smoke detectors and sprinkler systems.
- ▶ Upgrading electrical wiring systems.
- ▶ Safeguarding your property from vandals.
- ▶ Ensuring your property is occupied.

The NZHPT also advocates for discounts and rebates to recognise earthquake strengthening works.

For further information about insurance-related options and incentives, contact your insurance company, the Insurance Council of New Zealand or the Insurance Brokers Association of New Zealand.

4.7. Urban design, events and promotion

The design of the urban environment has a huge influence on historic heritage. The planning of the public domain, in both residential and commercial areas, has the potential to either undermine the conservation of historic heritage or enable greater adaptive reuse and economic viability. Achieving positive urban design and historic heritage outcomes will require careful planning and management of aspects such as:

- ▶ Public transport, traffic and car parking.
- ▶ New buildings.
- ▶ Parks and green spaces.
- ▶ Pedestrian access and footpaths.
- ▶ Cycle ways.
- ▶ Street furniture.
- ▶ Signage.

Many urban centres in New Zealand have positive examples whereby urban design initiatives have enabled historic heritage preservation and adaptive reuse. These examples include the Kerikeri Basin (construction of the Kerikeri bypass), Vulcan Lane and Britomart Transport Centre (Auckland), Emerson Street (Napier), Cuba Street, Blair



Art Deco Trust, Napier
www.artdeconapier.com

⁸³ NZHPT, *Sustainable Management of Historic Heritage Guidance Series*, Guide No. 7, 'Insurance and Heritage Properties', August 2007.

and Allen Streets (Wellington), Worcester Street (Christchurch) and Queenstown heritage precinct (Queenstown). These are a few of many other examples, where local authorities have aimed to achieve the right mix of traffic and pedestrian spaces in an urban landscaped environment that has facilitated the economic and cultural viability of historic heritage.⁸⁴

4.7.1 Auckland's shared streets initiative

Since 2010, Auckland Council has been developing shared streets within the Auckland CBD. Shared streets provide space for pedestrians, cyclists and vehicles to encourage 'cohabitation' and improved accessibility. Elliot and Darby streets were the first shared streets and recently Jean Batten Place and Fort Lane have become new shared spaces. The initiative has been overwhelmingly successful in encouraging urban revitalisation and adaptive reuse of heritage buildings, including the former Jean Batten Departmental Building and the old Imperial Buildings resulting in new boutique retail, office and restaurant businesses. Ludo Campbell-Reid, Urban Design Champion for Auckland Council, reported that in February 2013 that pedestrian numbers in Fort Street were up by more than 50 percent on average during the week and increased consumer spending.⁸⁵



Imperial Buildings, Fort Lane Shared Space.
Photo, Idealog.co.nz

84 Further information about urban design and historic heritage is available from the *Sustainable Management of Historic Heritage Guidance Series*, Discussion Paper No.4.

85 'Building the world's most liveable city', *NZ Construction News*, 1 February 2013.

In addition to urban design, historic heritage can be promoted by a wide range of initiatives, events and functions. The contribution of these events towards economic and cultural viability of historic heritage cannot be underestimated. As an example, the Hawke's Bay Art Deco Trust commissioned an economic impact study in 2006 which revealed that Napier Art Deco tourism (based on the Napier Art Deco Walking Tours, shop and Art Deco Festival and related events) had a direct economic impact of \$11 million. It had an indirect multiplier effect of \$12 million, totalling \$21 million p.a.⁸⁶

Other more well-known heritage-related events and initiatives include:

- ▶ Auckland Heritage Festival.
- ▶ North Shore Heritage Festival.
- ▶ Jackson Street Carnival (Petone).
- ▶ Cuba Street Carnival (Wellington).
- ▶ Wellington Walking Tours.
- ▶ Christchurch Heritage Week.
- ▶ Caroline Bay Carnival (Timaru).
- ▶ Oamaru Victorian Heritage Celebrations.
- ▶ The Dunedin Heritage Festival.
- ▶ Invercargill Rural Heritage Day.

4.8. Other heritage incentives

In addition to the regulatory and non-regulatory incentives outlined in this research paper, there are many other types of incentives. The most common are listed in Appendix 6 and include:

- ▶ Provision of free technical advice and information.
- ▶ Heritage awards.
- ▶ Support for preparation of conservation plans.
- ▶ Support for fencing and painting.

⁸⁶ http://www.artdeconapier.com/data/media/documents/HISTORY%20_3_.pdf

4.8.1 A heritage credit scheme

The adoption of a heritage credit scheme has been promoted by the Heritage Chairs and Officials of Australia and New Zealand (HCOANZ). In a research report for HCOANZ in 2005, the Allen Consulting Group investigated the use of a heritage credit scheme.⁸⁷ A type of heritage credit TDR has operated in the Sydney CBD for some years.

Heritage credits work on a ‘beneficiary-pays’ principle whereby owners who adopt practices or works that result in improved heritage outcomes would be awarded with ‘heritage credits’. The scheme could operate nationally or locally not unlike the United States Tax Relief scheme outlined earlier in this document. Heritage buildings that are maintained and repaired to a certain national standard could receive the ‘credits’. The awarding of the credit could operate in a similar manner to the EECA Home Energy Rating Scheme (HERS) or other green star rating systems overseas.

Private individuals, companies or local governments could purchase the heritage credits from the owners. Alternatively, the heritage credits could entitle the owner to receive rates relief, tax incentives or eligibility to apply for grants. The Allen Consulting Group provide the example of a tourist operator who relies on the conservation of a particular historic area as a basis for running walking tours. This operator may be willing to purchase credits to “ensure maintenance of their business.”⁸⁸

The heritage credit scheme aims to reward an owner for keeping a heritage building in good repair and maintenance. Unlike other incentives, the award is not triggered by a development-related application. The design of a heritage credit scheme could also recognise embodied energy and waste minimisation that is gained from building preservation. In other words, the credit could recognise the ‘green heritage’ values and associated public benefits. Private companies may purchase these credits in order to brand their company as both environmentally and culturally sustainable.⁸⁹

⁸⁷ The Allen Consulting Group, *Thoughts on the ‘When’ and ‘How’ of Government Historic Heritage Protection*, Report for HCOANZ, October 2005, p48.

⁸⁸ Ibid.

⁸⁹ Robert McClean, ‘Planning for heritage sustainability in New Zealand – A Safe Heritage Credit Scheme’, Presentation and paper for the Safe Buildings Conference, August 2011.

Appendix 1.

Best practice guidance for design and management of a local authority heritage grants scheme

The Office for the Community & Voluntary Sector has published good practice funding guidance for government agencies. The guidance covers issues relating to funding relationships, funding options, managing risk and monitoring and evaluation and is available on the good practice funding website:

<http://www.goodpracticefunding.govt.nz/index.html>

The principles and processes recommended in the good practice funding guidance will be relevant for the design and management of local authority heritage grant schemes. For example, the guidance states that public entities should adopt principles for the management of public resources, including lawfulness, accountability, openness, value for money, fairness and integrity.

In 2004, the Environment Protection and Heritage Council of Australia (EPHC) undertook a review of incentives and policy tools relating to historic heritage.⁹⁰ This review examined the full range of incentives and other policy tools available in both Australia and internationally, and evaluated the effectiveness of incentives. The EPHC review highlighted the importance of integration of incentive review processes with state of the environment reporting relating to the historic environment. Key questions in evaluating effectiveness developed by the EPHC were:

- ▶ To what extent does an incentive induce conservation outcomes that would not have occurred in the absence of that incentive?
- ▶ To what extent does an incentive provide equity for owners of heritage places?
- ▶ How effective are heritage incentives in relation to other forms of government expenditure?
- ▶ How effective is one form of incentive compared with another?⁹¹

Some of the findings of the EPHC review are outlined below.

⁹⁰ EPHC, *Making Heritage Happen: Incentives and Policy Tools for Conserving our Historic Heritage*, February 2004.

⁹¹ *Ibid*, p 34.

Key findings Australian EPHC Review

Most of the grant, loan and tax schemes provided in Australia have been quite small, and have fallen well short of the amount required to make a significant impact on heritage conservation activity within a state or locality.

Over-subscription is the norm for grant and loan schemes in Australia.

[The] disproportion between applications and available funds masks the broader pool of applicants who do not even bother to apply, because the quantity of available funding is manifestly too low.

Over-subscription can lead to disenchantment, particularly given the paperwork involved in making applications.

For **grant schemes targeted at State Registered places**, “it suggested that a suitable minimum quantity would be \$2.5 million in grants per annum per 1,000 places in the State, and an ratio of less than 3:1.”

In the case of **loan schemes targeted at State Registered Places**, it is suggested that “a suitable minimum quantity would be a minimum of \$1 million in subsidised loans per annum per 1,000 places in the State Register, and an over-subscription ratio < 3:1”

No single financial incentive or other policy tool offers a ‘magic wand’ solution; rather, a combination of complementary tools produces the best results. Ideally, a comprehensive heritage program incorporates: strong financial incentives; advisory services for owners; a planning regime that is sympathetic to conservation outcomes, or is at least neutral; promotion of conservation outcomes through a system of ‘revolving’ acquisitions, donations, and restorations; and a strong focus on community promotion, information and demonstration.

Without a strong commitment by government, an incentive scheme or policy tool will tend to be a ‘token’ programme that raises public expectations only to disappoint them.⁹²

⁹² Ibid, pp 37-38 emphasis in original.

NZHPT recommended approach for design and management of local authority heritage grant schemes

The following recommended approach is based on the National Heritage Preservation Incentive Fund Policy.⁹³ A copy of the fund policy is available, on request, from the NZHPT. Information about the fund and a copy of the application forms are available from the NZHPT's website:

http://www.historic.org.nz/heritage/funding_nhpif.html

Fund planning and administration

1. The scope and type of heritage grant scheme should be carefully considered with preliminary research being undertaken with regards to the need for the scheme and experience of other similar local authorities. The NZHPT should be contacted at the early stages of the project.
2. If Council is a registered charitable trust under the Charitable Trusts Act 1957, then it is possible that the income that is received to fund grants could be tax-free at source.⁹⁴ It is recommended that local authorities obtain advice from the IRD or a tax adviser on this matter.
3. Council should seek expert advice on any GST-matters relating to administration of the fund. Applicants may or may not be GST-registered.
4. The fund should be managed by a dedicated staff member within Council. It is preferable that they have some experience in historic heritage. The role of the dedicated staff member should include:
 - ▶ Preparation of the fund policy and application forms.
 - ▶ Establishment of the Heritage Fund Advisory Committee (the advisory committee) and liaison.
 - ▶ Seeking external advice from professionals with expertise in historic heritage.
 - ▶ Checking fund applications for sufficient information and eligibility.
 - ▶ Preparing fund applications for consideration by the advisory committee.
 - ▶ Preparing fund applications for approval by Council.
 - ▶ Preparing fund agreements for written signature by Council and applicants.
 - ▶ Seeking legal advice for fund applications and written agreements.
 - ▶ Monitoring funded works and progress.
 - ▶ Checking that work has been completed to sufficient standard and all paperwork is completed.
 - ▶ Preparing and obtaining authorisation for payment of fund to applicant.

⁹³ NZHPT, 'National Heritage Preservation Incentive Fund: Incentive Fund Policy', Approved by Minister for Arts, Culture and Heritage, 23 January 2007.

⁹⁴ George Farrant, 'Incentives – The Auckland Experience', Presentation for the National Workshop Heritage Incentives, Auckland, 10 August 2009.

- ▶ Generally, monitoring the fund and providing progress reports to Council.
5. Council can delegate funding decisions to a dedicated sub-committee.
 6. Council should establish an external advisory committee that consists of persons experienced in historic heritage. The NZHPT is a member of a number of local authority heritage advisory committees and the NZHPT's participation should be agreed upon with the relevant NZHPT regional or area manager.
 7. The role of the advisory committee should include:
 - ▶ Providing advice on applications to the fund in terms of eligibility criteria relating to proposed conservation work.
 - ▶ Considering applications and making recommendations to Council.
 - ▶ Providing advice if funded works have been completed to sufficient conservation standard.
 - ▶ Providing general advice to Council on administration of the fund.

Fund policy

8. The heritage grant scheme should be established by a clear policy approved by Council (the fund policy).
9. The fund policy should be part of Council's Long Term Council Community Plan and related financial and reporting requirements of the Local Government Act 2002.
10. The fund policy should include critical information about the nature and type of the scheme, including:
 - ▶ The purpose of the fund.
 - ▶ How the fund will be administered.
 - ▶ How much funds will be available for distribution.
 - ▶ What type of funds will be made available.
 - ▶ What are the eligibility criteria in terms of historic heritage and conservation works.
 - ▶ How the Council will receive applications (the policy should include an application form template).
 - ▶ How the Council will assess the applications (process and criteria for assessment).
 - ▶ What conditions will be required in relation to approved grants.
 - ▶ How the fund will be monitored and reported.
11. The approved fund policy, application forms and information about application deadlines and decisions should be made available on Council's website.

Fund purpose

12. The purpose of the fund should be to encourage the conservation of historic heritage in the region or district. The fund should complement any regulation adopted in the regional or district plan.

Administration of the fund

13. The delegation for the administration of the fund should be stated in the fund policy. Normally, the funding decisions are delegated to a Council sub-committee or individual staff member. It is best practice for decisions to be informed by a specialist advisory group which includes professional expertise in historic heritage.

Funds available for distribution

14. The fund policy should outline the total amount of the fund allocated by Council on an annual basis and the maximum total of individual grants.
15. The maximum total of individual grants should have flexibility to provide a small number of large grants for substantial conservation (landmark) projects and a larger number of small grants for small-sized conservation projects.
16. Some funds may pay the full 100 percent costs of conservation works, others may limit the contribution to a percentage of the total cost (e.g. 50 percent). This percentage amount should be explicit in the fund policy.
17. Funds should be made available for emergency situations. These funds should be available, at short notice, to deal with situations such as emergency repairs following a storm or an unexpected discovery under construction works.

Type of fund

18. Normally, the type of fund will be a simple grant. Other types, however, such as loans should be considered.

Eligibility criteria

19. Since the purpose of most heritage fund schemes is to provide a 'carrot' to complement the 'stick' of regulation, the fund should be limited to owners of properties that are:
 - ▶ Listed for protection in the regional and district plan.
 - ▶ Registered under the Historic Places Act 1993.
 - ▶ Recorded as archaeological sites as defined in the Historic Places Act 1993.
 - ▶ Subject to a protective covenant or heritage order.

20. The definition of ‘owners’ should be clarified to include owners who hold a long-term lease to the property under the Land Transfer Act 1952, tenure under the Crown Pastoral Land Act 1988 or other long term lease or concession. In these cases, eligibility should be decided upon a case-by-case basis considering:
- ▶ The nature and history of occupation and lease.
 - ▶ Evidence of the commitment of the owner to occupy and maintain the property.
 - ▶ Any relevant covenant over the property.
21. While the eligibility criteria should exclude Council-owned properties, it should allow Council to obtain funding assistance in special circumstances. It is often the case in situations of ‘demolition by neglect’ or ‘orphaned buildings’ that an owner may refuse to apply for funding or no record of ownership can be discovered. In these cases, Council may wish to apply for funding and carry out the conservation works without the owner’s participation.
22. Other places, that are not protected under the RMA or Historic Places Act 1993, should be able to be considered for funding assistance as part of an ‘exceptional circumstances’ provision. For example, if a district plan only protects historic buildings, then other types of heritage, such as wahi tapu, will not be eligible for funding assistance.
23. The fund policy should provide clear guidance on the type of work that is eligible for funding assistance. This should be limited to work that has a positive conservation outcome. It will normally involve:
- ▶ Stabilisation, repair, maintenance and restoration to historic buildings and structures (e.g. earthquake strengthening, fire protection, roofing, repairs to masonry, joinery, plaster or glazing).
 - ▶ Conservation work relating to land or archaeological sites (e.g. site stabilisation, repair, vegetation management, fencing).
 - ▶ Conservation work relating to places and areas of significance to Maori (e.g. marae restoration, pou repair, urupa maintenance, landscaping).
 - ▶ Professional services (e.g. research, condition reports, conservation plans, archaeological assessments, cultural values assessments, management plans, supervision of work).
 - ▶ Interpretation and public education and information.
24. The fund policy should provide clear guidance on the types of work that are not eligible for application to the fund. This type of work will involve construction of new buildings, alterations and additions, reconstruction, relocation, demolition, insurance and debt repayments.
25. The fund policy should state that heritage conservation projects that have already been completed at the time of the fund application will not be eligible to apply to the fund. An exception, however, should be provided for so that situations such as urgent works can be considered on a case-by-case basis.

Application process

26. The fund policy should state how the public can apply for funding and include matters such as:

- ▶ Public advertisement of the fund and any funding deadlines.
- ▶ Application information requirements.
- ▶ The type of information to be included in the application form.
- ▶ Applicants may be asked to provide further information.
- ▶ Applicants must agree that the information in the application and information subsequently generated will be made available if required under the Official Information Act 1982.
- ▶ Applicants will be made aware of how Council will manage any private information with regard to the Privacy Act 1993.
- ▶ How many applications for the same property will be allowed each year.
- ▶ How unsuccessful applicants will be notified.

27. Further, the fund policy should state how funding will be granted. This will normally involve a decision by Council which is conditional on a written agreement between Council and the applicant which outlines the details of the grant and the associated conditions.

28. Funding should only be paid when the agreed work has been completed, inspected and approved.

Assessment of applications

29. The fund policy should outline the process by which Council will assess the applications. As stated above, the process should involve a technical advisory committee that includes professional heritage expertise. In some instances, the NZHPT is a member of technical advisory committees or local authority heritage grant schemes.

30. The fund policy should provide criteria that will guide Council's decision-making. The criteria should include matters relating to heritage significance, risk, urgency, conservation standards, public benefit and cost effectiveness.

Conditions of receipt of funding

31. All grants, and subsequent funding agreements, should include a number of standard conditions that include:

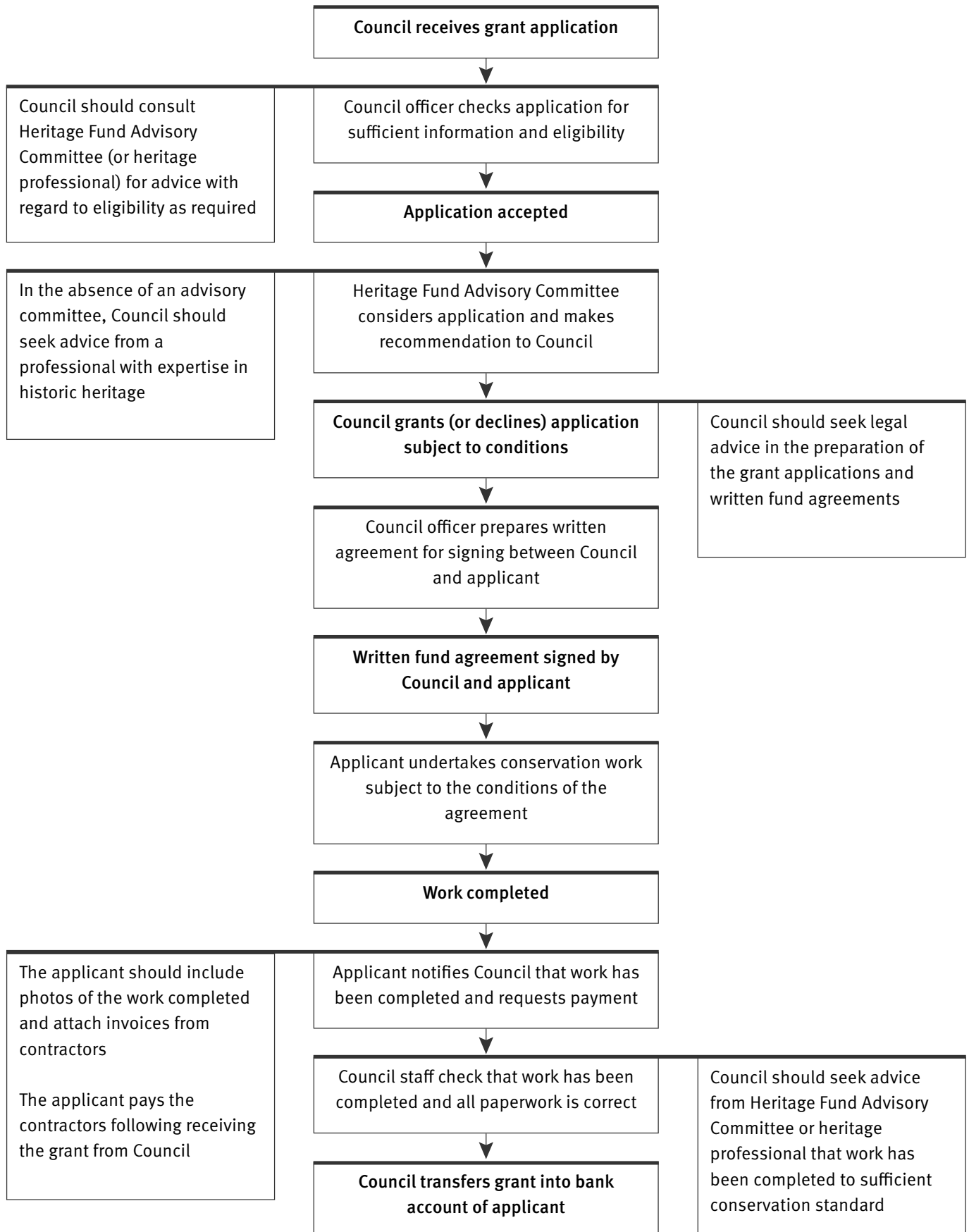
- ▶ That compliance with all applicable statutory requirements is the responsibility of the recipient.
- ▶ That payment of approved grant money is conditional on work being completed to satisfaction of Council and meeting best practice conservation standards (as assessed by a heritage conservation professional).

- ▶ The property must be available for inspection of the conservation work.
- ▶ That, wherever possible, acknowledgement of the funding given is provided by the erection of suitable signs and banners (supplied by Council).
- ▶ The conservation work should normally be commenced and completed within a stated period of time (e.g. commenced within 12 months and completed within two years of Council approving the grant).
- ▶ The recipient must agree to the public reporting of information such as: name of the recipient; name and address of the property and its heritage significance; funding allocation; and conservation work carried out.
- ▶ That the Council retain power at its discretion to require repayment if information in the application proves to be false or if conditions are breached.

Monitoring and reporting

32. The fund policy should state how Council will monitor all funded conservation work and reporting processes.

Recommended Process for Local Authority Heritage Grant Schemes



Appendix 2.

Summary of district plan regulatory incentives (excluding consent fee waivers)

District Plan	Summary of incentive provisions for historic heritage	Section
Far North	Scale of activity (potential to increase to 100 percent).	12.5.6.2.1
	Subdivision, development bonus (form of conservation lot and possible consent cost waiver).	12.5.6.3.1
	Potential waiver of financial contribution.	14.6.3
Kaipara	Within the Subdivision Rules in the Zone Chapters, there is provision of increased development rights where protection of heritage resources is offered by an applicant as part of a subdivision process.	Part B: Land Use
Whangarei	Subdivision, environmental benefit.	73.3.2
Auckland Central Area	Heritage floor space bonus, existing use and activity incentive, exemption from consent fees, exemption from subdivision and financial contribution requirements if conservation plan has been prepared. Currently under review as part of preparation for unitary plan.	10.4.2
		10.9.3
		6.7.2.5
		6.7.5.7
Auckland Isthmus	Transfer of development rights, existing use and activity incentive, exemption from consent fees, exemption from subdivision and financial contribution requirements if conservation plan has been prepared. Currently under review as part of preparation for unitary plan.	5C.4.2
Auckland Hauraki Gulf	Conservation lots. Currently under review as part of preparation for unitary plan.	7.4.3
North Shore	Potential to waiver any development control of other non-heritage rule provision. Currently under review as part of preparation for unitary plan.	11.4.1.1
Franklin	Conservation lots, also note saying Council may consider relaxing other plan provisions. Currently under review as part of preparation for unitary plan.	22.11.4

District Plan	Summary of incentive provisions for historic heritage	Section
Proposed Hauraki	Relaxation or waiving parking requirements or bulk and location rules where this would encourage sustainable reuse and protection of heritage values.	
Proposed Waipa	Encourages the ongoing protection of Waipā's heritage items through the implementation of incentive rules relating to the reuse of such buildings. Policy 2.3.6.5 Makes provision for medical centres, offices, restaurants, cafés and other eating places, and childcare and pre-school facilities to occur within buildings listed in Appendix N1 (includes rules). The transportation zone also contains relaxation of parking, loading and access requirements.	Policy 22.3.6.2/2.3.6.5 plus rules
Matamata-Piako District Plan	Subdivision, conservation lots, waiver of car parking requirements.	6.1.3
Proposed South Waikato	Any otherwise non-complying subdivision in the Rural zone or Rural Residential zone, if as a result of the subdivision a significant natural area or a significant archaeological site is to be protected in perpetuity by covenant or other legal means to the satisfaction of Council. One additional protection lot is allowed under this provision per significant natural area or significant archaeological site that is being protected (conditions apply).	10.3
Thames-Coromandel	Subdivision, conservation lots.	752.3
Western Bay of Plenty (Operative 2012)	7.6.3 Building Act Flexibility Council may consider more creative solutions to building consent issues through section 47 of the Building Act.	7.6.3
Whakatane	Flexible zoning provisions, restoration.	4.1.14/4.1.8.4
Gisborne	Economic incentives section (parking dispensations, waiver of financial and reserve contributions).	3.11.2
Hastings	Subdivision, conservation lots. Plan Change 47	15.1.8.2
Marlborough Sounds	Subdivision, special purpose lots.	27.3.3.1.2

District Plan	Summary of incentive provisions for historic heritage	Section
Christchurch	<p>The Christchurch Central Recovery Plan introduced substantial zone waiver provisions in July 2012 to facilitate the heritage recovery of the city. The rule (applying to the Central City) states that in respect of any activity on any site involving any heritage building, place or object, any activity in or upon the same site shall not be required to comply with any of the relevant standards specified below:</p> <ol style="list-style-type: none"> a. Scale of activities and residential coherence (Living Zones); b. Retailing (Living Zones); c. The following car parking and cycle parking standards in Vol.3, Part 13 Central City Zones: 2.4.1 (a) Car parking space numbers; 2.4.1 (c) Car parking space numbers; 2.6.1 Car parking space numbers. d. The following standards in Vol.3, Part 3: 2.2.1 Building Setbacks and Continuity (Central City Business Zone); 3.4.5 Street Scene (Business 1 Zones within the Central City). e. The following standards in Vol.3, Part 3 or Part 11, for alterations to heritage buildings only: 2.2.6, 2.2.16 and 2.2.12 Verandas, Minimum Unit Size, Outdoor Living and Service spaces (Central City Business Zone, and 3.2 Business 1 Zones within the Central City); 1.3.4(h) Acoustic insulation (Central City Business and Business 1 Zones within the Central City); 3.6.2 Gross Leasable Floor Area (Business 1 Zones within the Central City) 	
Kaikoura	Subdivision, allotment size flexibility.	13.12.11
Dunedin	Council may reduce or waive any control in the district plan if they are certain the proposal will restore, protect or maintain a heritage building.	

Appendix 3.

Summary of local authority resource consent fee waivers for historic heritage

Resource Consent Heritage Fee Waivers (as at October 2012)

Council	Summary
Far North District	Fees may be waived for applications concerning heritage orders, plan changes to the schedule.
Whangarei District	Possible resource consent application fee waiver.
Former Auckland, Manakau, North Short, Rodney, Waitakere and Franklin Districts	Consent fees waivers were provided under operative district plans. Under review as part of new unitary plan process.
Hamilton City	Possible waiving of resource consent fees.
Matamata-Piako District	Resource consent fees are waived for applications concerning heritage sites.
Otorohanga District	Possible waiving of resource consent fees for resource consents which result in the protection, maintenance or upgrading of heritage resources.
Thames Coromandel District	Possible financial assistance for resource consents required under the district plan.
Waitomo District	Possible waiver of resource consent fees.
Rotorua District	No charge for applications for consents related to conservation, restoration and protection of heritage buildings and features listed in the district plan.

Resource Consent Heritage Fee Waivers (as at October 2012)

Council	Summary
Gisborne District	Waiving of resource consent fees for applications for additions or alterations to heritage buildings and structures or for changes of use provided that the change of use is for adaptive reuse that complies with the ICOMOS charter provisions and the resource consent is granted. Refund of consent application fees when an archaeological site survey is undertaken and an archaeological site is identified and mitigating measures, including legal protection of that site, are undertaken.
Wairoa District	Possible waiver of application fees for use, development and subdivision activities that safeguard resources of value to the community.
New Plymouth District	There is no processing fee payable for non-notified resource consent applications for alterations or additions to district plan listed heritage buildings or items. Charges will apply to any external and specialist inputs if required.
Horowhenua District	Possible waiver of administration fees in the protection of heritage features.
Palmerston North	Possible waiver of fees to both complement the rules contained within the plan and to encourage the retention of buildings of cultural heritage value in private ownership.
Wanganui District	Where an activity would have been a permitted activity under the underlying zone, but requires resource consent under the above provisions, the Council will waive resource consent fees.
Kapiti Coast District	Waiver of building consent fees for work which protects or enhances heritage values for the first \$20,000 of building work and waiver resource consent fees where appropriate.
Masterton District	Resource consent fees will be waived for applications for alterations to heritage items or for changes of use provided that the change is for adaptive reuse and the resource consent is granted. Refund of consent application fees where an archaeological site survey is undertaken and an archaeological site is identified and mitigating measures including legal protection of the site are undertaken.
Porirua City	Possible waivers of fees.
Hutt City	\$3,000 is set aside to waive resource consent fees for alterations to heritage buildings.

Resource Consent Heritage Fee Waivers (as at October 2012)

Council	Summary
Wellington City	Wellington City Council will reimburse resource consent fees to owners of listed heritage items or items in listed heritage areas. Private owners and charitable trusts, including church organisations, are eligible. A decision to grant resource consent fee reimbursement is at the discretion of the Council's Principal Heritage Advisor. Before granting reimbursement, heritage advisors may specify certain conditions. Applicants are required to agree in writing to these conditions and pay any reimbursed resource consent fees if the conditions are violated. The Council allocates \$50,000 each financial year to heritage resource consent fee reimbursement. A cap of \$2,500 is applied to each application.
Marlborough District	Possible waiving of resource consent application fees.
Nelson City	The Council introduced Zero Fees for non-notified resource consent applications to conserve and restore heritage buildings, places or objects. In the 2011/12 financial year resource consents to the value of \$2,500 were waived under this policy.
Selywn District	Historic Buildings, Places and Objects Fund: To help applicants meet the processing costs for resource consent applications related to the maintenance or restoration of cultural or historic buildings, and for projects involving the maintenance or restoration of cultural or historic sites or buildings. Maximum grant is \$2,000 (plus GST) available to those requiring some sort of consent due to their item being a listed heritage item in the district plan.
Timaru District	Possible waiving of resource consent application fees.
Mackenzie District	Process resource consent applications relating to historic buildings free of charge.
Central Otago District	Council recognises the public benefit in maintaining and enhancing heritage precincts by waiving application fees associated with resource consents for work within a heritage precinct that requires resource consent only because that activity is located within a heritage precinct.
Dunedin City	Council waives resource consent fees for minor works on heritage items listed in the district plan.

Appendix 4.

Summary of local authority heritage-related grants

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Far North District Council Community Fund		Heritage Assistance Fund replaced by general community fund from 1 July 2009).	Applications to fund projects which promote, maintain, improve, develop or undertake recreational and community amenities, facilities, programmes and services in the district, other than those normally considered in Council's annual or long-term planning process.
Kaipara District Council Heritage Assistance Fund	\$15,000	Up to \$10,000 but individual grants are capped at 50 percent of the total cost of a project.	Funds could be used to support the structural review of these buildings and the identification of suitable means of improvement. The work to be undertaken is essential and appropriate to ensure preservation of the heritage resource.
Former Auckland City, Manukau, North Shore, Rodney and Waitakere heritage funds	Various – combined total is about \$50,000	Various – most grants tend to be up to \$10,000.	The former Auckland City, Manukau, North Shore, Rodney and Waitakere councils developed grant funds for historic heritage. These funds are now managed by Auckland Council. Information about the funds is available from the Auckland Council website. ⁹⁵ There are also other sources of funding such as the local boards discretionary grants.
Auckland Council Built Heritage Protection Fund	\$10.3m		Established June 2011. \$10.3 million in 2011/2012. \$4.6 million per annum in following years. The primary role of this fund is to assist in purchase of heritage buildings at risk as a revolving initiative.

⁹⁵ <http://www.aucklandcouncil.govt.nz/EN/newseventsculture/communityfundingsupport/grantsfunding/environmentheritage/Pages/home.aspx>

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Waikato District Council Heritage Assistance Fund	Funding available on a three-yearly cycle.	The next heritage funding round is late February 2014.	To assist with the conservation, restoration and protection of valued heritage items within the Waikato District Council boundaries that are not Council owned.
Environment Bay of Plenty Regional Council Environmental Enhancement Fund	Up to 300,000	A single application should not exceed 10 percent of the total available funding.	<p>The fund's purpose is to assist regional organisations and community groups by providing financial and technical support for activities and projects whose primary purpose is to directly promote, enhance or protect:</p> <ul style="list-style-type: none"> ▶ the natural or historic (including cultural) character of; ▶ public access to; and/or ▶ public understanding. <p>More specifically, it focuses on projects that look at public access of, the public's understanding of, and the natural or historic character of the environment.</p>
Napier City Council Art Deco Improvement Fund		Grants paid at a rate of \$25 per linear metre per floor and applies only to walls facing the street.	Eligible for buildings either in the Art Deco Heritage District or those commercial, industrial or community purposes buildings outside the CBD which are significant examples of art deco. Also for buildings listed with the NZHPT and buildings listed under the district plan. The fund does not apply to residential buildings.
Hastings District Façade Enhancement Scheme	\$16,000		The programme provides grant assistance to owners and tenants of heritage buildings in the CBD for the painting and enhancement of building façades of architectural and historical significance primarily within the CBD. However buildings along key traffic routes and within suburban commercial shopping areas can also be considered for a grant. The amount of grant is determined by the Urban Design & Parks Planner, and varies according to façade size, colour scheme costs and the profile and significance of the building.

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
New Plymouth District Council Heritage Protection Fund	The Council contributes \$25,000 per year towards its Heritage Protection Fund and unspent funds are carried over to successive years.	Provided the work in question meets the Council's criteria for consideration, the amount of funding will be dependent on the importance of its building, the necessity, the availability of funds and applicant's resources.	The Heritage Protection Fund was established by the Council to help private landowners manage, maintain and preserve the heritage values of their properties. It provides a partial contribution towards the cost of a specific heritage project or work. Applications can be made for any item identified in the heritage schedule of the district plan.
Wanganui City Building Assessment Assistance Fund	\$29,000	Assistance is given as a dollar for dollar grant to a maximum grant of \$1,500 for any one report.	The fund helps owner or purchaser to have preliminary expert reports done for a building so they know what is needed to comply with the Building Act. These reports may be Initial Evaluation (IEPs) Procedures for earthquake-prone buildings or cover fire safety and physical access. The Fund is not for detailed design or physical works but for assessing the condition of the building and scoping necessary works. Buildings in the Old Town Conservation Overlay Zone, the Central Commercial Zone and on (or potentially on) the District Plan Heritage list are eligible.
Manawatu District Council Heritage Improvements Fund			Fund was reduced from \$50,000 for 2009/10, noting that fund currently has a positive balance (combines heritage incentive grants fund, heritage incentive planning grants fund, and earthquake risk building fund).

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Palmerston North Council Natural and Cultural Heritage Incentive Fund		Grants are 50 percent of the cost of approved works up to a maximum of: Commercial properties 10,000; Community properties (not subject to rates) 10,000; residential properties \$5,000; Conservation asset management plans \$5,000.	<p>The primary targets of the incentive fund are:</p> <ul style="list-style-type: none"> ▶ Heritage conservation work. ▶ Heritage research, education and promotion initiatives. ▶ Earthquake-prone heritage buildings. ▶ Notable trees. <p>Available for:</p> <ul style="list-style-type: none"> ▶ Owners of listed buildings, sites, objects or trees. ▶ Rangitaane Iwi. ▶ Non-profit incorporated heritage groups/organisations. ▶ Specialist heritage places conservation/management bodies.
Tararua District Council Heritage Protection Reserve	\$36,797	There is no specific amount for the size of any grant. A minimum of 50 percent of the project's total cost is required.	Applications can be made for any item identified in the Heritage Schedule of the District Plan including: historic buildings and places, historic churches, structures and monuments, archaeological sites and waahi tapu and registered historic areas. It may also apply to items that are not listed in the district plan if they meet the Heritage Advisory Group's criteria for significance.
Ruapehu District Council Heritage Grants Policy			An incentive for owners of heritage buildings listed in the District Plan Schedule of Heritage Buildings to maintain the buildings at a high standard. Note: to the NZHPT's knowledge, there have been no grants made under the policy and no specific money is set aside in the annual planning process.

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Hutt City Council Heritage Fund	\$130,000	Maximum not documented.	Any applications over \$15,000 will require a heritage report or advice from a suitably qualified heritage conservation professional. In all but exceptional circumstances, Hutt City Council will not pay more than 50 percent of the cost of conservation.
Kapiti Coast District Council Heritage Fund	\$27,000	Up to \$5,000.	To be eligible the place must be: a registered heritage feature (registered in the Kāpiti Coast District Plan Heritage Register, the New Zealand Archaeological Association Site Recording Scheme, or the Historic Places Trust Register); or any other heritage feature (including trees, buildings, wahi tapu or wahi taonga, heritage objects, or archaeological, historic or geological sites). However, the place must meet the General Criteria listed in this document; and b) have a heritage management plan. With respect to (a) above, the site does not have to be listed in the District Plan Heritage Register at the time the funding is applied for. It is sufficient to agree to registration in the Register.
Masterton District Heritage Fund		Annual Rates Credit.	Each property with an item listed in Appendix F.4A and F.4B of the Masterton District Plan will be given an annual credit of \$50 to be used for work that enhances or maintains the heritage item. The credit will be held and recorded by the Council until such time as the owner requests the money for these works and the consent is granted.

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Wellington City Council Built Heritage Incentive Fund	\$329,000	Up to 25 percent of the cost of the work to a maximum of \$80,000. Funding for conservation reports, technical advice and for domestic fire protection systems will be generally up to a maximum of \$10,000.	<p>Criteria: The project relates to buildings and objects listed in the district plan. The project enhances the heritage significance of the item concerned, and where elements of the item are protected by provisions of the District Plan (eg the exterior of a heritage place). The project must be for:</p> <ul style="list-style-type: none"> ▶ stabilisation, repair or restoration of original heritage fabric relating to historic buildings, structures, or objects, or ▶ professional services (ie, structural strengthening reports, maintenance reports, conservation plans), or ▶ reimbursement of Council resource consent fees for approved conservation work requiring a resource consent (note: projects which have received funding for either items above cannot also obtain reimbursement of Council resource consent fees).
Nelson City Council Heritage Incentive Fund	Over \$60,000	Grants of \$1,000 (+GST).	<p>To be eligible, the building, object or site must be listed in the Nelson Resource Management Plan and it must not be owned by the Crown, Council, or its agencies.</p> <p>The following types of projects are eligible for funding:</p> <ol style="list-style-type: none"> i. stabilisation, repair or restoration of original heritage fabric relating to historic buildings or structures (e.g. repairs to masonry, joinery, plaster or glazing, earthquake strengthening or fire protection), provided the work is to the standard approved by the Council; ii. professional services (e.g. research, condition reports, conservation plans, heritage plans, conservation work specifications, management plans); iii. the proposed work must have all necessary Council and NZHPT approvals.
Tasman District Council Heritage Building Restoration Initiatives Fund	\$5,000	Grants of up to \$500.	Available for specialised restoration work on buildings identified as having heritage values and listed in the Tasman Resource Management Plan. Eligible restoration works any of repiling, repainting, reroofing, replacing guttering, earthquake strengthening and fire protection.

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Ashburton District Council Heritage Reserve Fund	\$60,831	The maximum individual grant from this source shall be no greater than 50 percent of the cost of the approved project and in any event shall be no more than \$7,000.	<p>Projects which relate to heritage buildings/items that are scheduled Category A in the Operative District Plan, Group A or Group B in the Proposed District Plan.</p> <p>Projects may be for specialised maintenance or may involve repairs to heritage buildings/items that suffered damage in the Canterbury Earthquakes, such as replacing matching cladding or windows or other fittings in order to retain the heritage values of the building/item.</p> <p>Projects shall provide a full project plan (including the proposed work schedule) and financial statements (including quotes, other funding and the details of an EQC claim if applicable). Projects must be on private land (not owned by the Council) unless a heritage building/item on Council land is managed by a community group or organisation.</p>
Christchurch City Council Heritage Incentive Grant Fund	383,000 (also a Character Maintenance Grant Fund of \$45,310)		Grants of between \$5,000 and \$49,999 require a Limited Conservation Covenant to be registered on the property and grants of \$50,000 or more require a Full Conservation Covenant to be registered on the property in perpetuity.
Canterbury Earthquake Heritage Building Fund		Up to 50percent total cost of repair or restoration project.	<p>The fund was established with contributions from Council, NZHPT, Government and private donations. It is a special appeal that was launched to help fund the repair, restoration and strengthening of character and heritage buildings damaged during the Canterbury earthquakes. The purpose of the fund is to provide assistance to owners of heritage buildings to repair damage caused by the Canterbury earthquake of 4 September 2010, Christchurch earthquake of 22 February 2011, and aftershocks. Funding is targeted at the gap between insurance cover, and the actual cost of repairs and associated works including conservation works, structural upgrading and Building Code compliance works. The fund consists of contributions from territorial authorities, the NZHPT and donations. Any funds received will be matched by the government who have set aside up to \$10 million.</p>

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Mackenzie District Council Heritage Protection Fund	\$5,000		<p>This is a contestable fund with applications to be called for during March each year. Any remaining funds may be allocated to individual applications throughout the year at the Council's discretion. Available for: Buildings, items or places currently listed in the Heritage Items Schedule as Category X,Y or Z heritage items; Buildings, items or places which have been approved by Council to be included in the Heritage Items Schedule as Category X,Y or Z heritage items; Trees or groups of trees in the Protected Trees Schedule; Archaeological sites; and waahi tapu sites or areas as identified by the NZHPT.</p> <p>Each individual application will be eligible for a maximum grant of \$2,500 or the following percentage of the sum required, whichever is the lesser:</p> <ul style="list-style-type: none"> ▶ Category X items 75 percent. ▶ Category Y items 60 percent. ▶ Category Z items 45 percent. ▶ Protected Trees 50 percent. ▶ Archaeological or waahi tapu sites 50 percent.
Selwyn District Council Heritage Fund	\$15,000	A contestable fund distributed among successful applicants as grants (anywhere from \$500–\$7,500).	The purpose of the fund is to encourage and assist owners with work required to maintain and enhance heritage buildings in the district as well as that required on protected trees. Funds usually cover part of the work to be done with applicants making up the difference. The work must be completed in one calendar year. Payment is made upon receipt of the work being done.
Waimate District Council Heritage Fund	\$5,000	Normally grants will be limited to \$1,000. Not more than 50 percent of the total cost of a project can be granted from the fund.	Available to non-profit organisations that serve the social, educational, cultural or environmental well-being of the community.

Local Authority Heritage Grants as at October 2012

Council Fund	Total size of fund (2012)	Individual grant amount	Scope
Hurunui Heritage Fund	\$5,000		Available to assist owners in the preservation of historic heritage
Dunedin City Council Heritage Fund	\$82,000	The majority of grants are between \$5,000-\$15,000, with occasional maximums up to \$60,000.	Available to non-profit organisations that serve the social, educational, cultural or environmental well-being of the community.
Waitaki District Council Heritage Fund	\$100,000	Grants up to \$1,000. loans negotiable.	Eligible for owners of an historic building in the Waitaki District or those who own land upon which an historic site is located. Priority will be given to assist buildings that are owned by groups or organisations.
Gore, Invercargill & Southland District Councils – Southland Regional Heritage Development Fund – Venture Southland	\$100,000	Grants will normally be limited to a maximum of \$10,000 to provide seeding funds for heritage projects of regional significance. Amounts above this limit may be considered for large projects of outstanding merit.	The purpose of this fund is to provide grants for projects and initiatives which preserve, communicate and promote Southland’s heritage and are significant in a regional context .

Appendix 5.

Summary of local authority rates relief for historic heritage

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Far North District	The Council may postpone or remit rates where an area is afforded permanent legal protection through a covenant or reserve status.
Whangarei District	Possible rates relief.
Rodney District	Remission on rates (100 percent), excluding water or sewerage rates.
Hamilton City	Possible rates relief.
Matamata-Piako District	Possible rates relief to owners of heritage buildings.
Otorohanga District	Council will give consideration to rates relief on covenanted sites of heritage value.
South Waikato District	Council will resolve, on a case-by-case basis, what amount of rates (excluding rates for refuse collection, sewage disposal and water supply), up to a maximum of 33 percent, qualify for a remission.
Taupo District	Will consider rates relief for landowners to help encourage voluntary protection or enhancement of sites.
Waikato District	A 100 percent remission of all rates may be applied to land protected for historic or cultural conservation purposes.
Waitomo District	Possible rates relief.
Opotoki District	Providing rates relief for voluntary protection of resources on private land where such protection is of benefit to the wider community and in keeping with Council policy.
Tauranga City	Possible rates relief to assist heritage management.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Gisborne District	Partial rates relief for properties or the affected parts thereof, provided the heritage value of the item is maintained and, in respect of archaeological sites, suitable protection measures such as covenants are taken.
Central Hawkes Bay District	The extent of the rates remission if approved is to be 100 percent.
Hastings District	Land taken out of production and vested in a formal conservation covenant may be granted 100 percent remission of rates, with the exception of targeted rates for wastewater disposal, water supply and refuse collection.
Napier City	Rates remission for land subject to a heritage covenant under the Historic Places Act 1993 or any other covenant or agreement entered into by the owner of the land with a public body for the preservation of existing features of land, or of buildings, where the conditions of the covenant or agreement are registered against the title to the land and are binding on the subsequent owner of the land.
Wairoa District	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum of 50 percent of the rates owing.
Taranaki Regional	Remit all or part of the rates owed by the ratepayer in respect of rating units provided the conditions of the policy have been met.
South Taranaki District	Rates remission.
Stratford District	Will provide rates remission of up to 100 percent of the rates on land with a heritage structure on it to all ratepayers who meet the objectives, conditions and criteria of the policy.
Horowhenua District	Each application will be considered on its merits. If approved the value of the remission will be 100 percent in the case of Queen Elizabeth the Second National Trust covenants and 50 percent in other cases, of the general rates of that part of the rating unit covered by the application.
Manawatu District	100 percent of rates relief for listed Group A places and 50 percent for Category B places.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Palmerston North	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum amount of 33 percent of rates assessed for that rating unit per year.
Ruapehu District	Maximum of \$500 to be granted for a residential heritage property listed in the district plan as discretionary rates relief. Maximum of \$2,000 to be granted for a non-residential property listed in the district plan as discretionary rates relief.
Wanganui District	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum amount of 33 percent of rates owing per year.
Hutt City	Council will decide what amount of rates will be remitted on a case-by-case basis subject to a maximum amount of 50 percent of rates owing per year.
South Wairarapa	Council will decide what amount of rates will be remitted on a case-by-case basis.
Upper Hutt City	Allows Council to remit or postpone rates under selected criteria.
Marlborough District	Possible rates remission.
Nelson City Council	Owners of heritage buildings listed as either Group A or Group B in the Nelson Resource Management Plan, who commit to maintaining their buildings, are eligible for the remission. Owners of buildings listed as Group A in the Nelson Resource Management Plan will be eligible for up to a 50 percent remission, and owners of buildings listed as Group B will be eligible for up to a 25 percent remission of their general rates based on land value. The remission does not include storm water, uniform annual general charges or waste water charges. Each application will be considered on its merits and provision of a remission in any three-year cycle does not set a precedent for similar remissions in future cycles. Rates remission will be made by passing a credit to the applicant's rates assessment.
Tasman District	Rates remission is available for owners of heritage buildings with a commitment to maintain their buildings in return.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Selwyn District	Ratepayers who own rating units which have some feature or cultural, natural or historic heritage is voluntarily protected may qualify for remission of rates under this policy. Applications should be supported by documentary evidence of the protected status of the rating unit, for example, the copy of the covenant or other legal mechanism. In granting remissions under this policy, the Council may specify certain conditions before remission will be granted. Applicants will be required to agree in writing to these conditions and to pay any remitted rates if the conditions are violated.
Ashburton District	There is a process regarding rates remission through the Rating Department.
Kaikoura District	Rate remission will be made by passing a credit to the applicant's rates assessment.
Timaru District	Rates remission available.
Waimate District	Council will grant full remission of the general rate where application is made to Council and is satisfied that the owner of the land has voluntarily preserved or enhanced natural, historical or cultural features of the land. Council may also consider the extent to which public access to the land is provided by the landowner and commercial gain is derived by them. This remission will be funded from within the general rate urban, or general rate rural as appropriate.
Central Otago District	Council will decide what amount of rates is to be remitted on a case-by-case basis, subject to a maximum of 30 percent of rates assessed in a year.
Clutha District	Council will consider up to 100 percent of general rates.

Local Authority Heritage Rates Relief Schemes (as at October 2012)

Council	Summary
Dunedin City	<p>Available to non-profit organisations that serve the social, educational, recreational, cultural or environmental well-being of the community. Owners of heritage buildings undertaking major restorative works may be eligible for rates relief. Heritage rates relief aims to reward imaginative and/or productive reuse of heritage or townscape buildings. Rates relief is allocated from a contestable fund and the following considerations will guide decisions on who receives relief and the amount given:</p> <ul style="list-style-type: none"> ▶ The level of investment (there is a typical investment threshold of \$100,000). ▶ The significance of the building. ▶ The type of building use. ▶ The location of the building. <p>Dunedin also has a Targeted Rate Scheme for Earthquake Strengthening of Heritage Buildings. This allows building owners to obtain funding for earthquake strengthening of heritage buildings and pay this back through a targeted rate on their property. Eligible building owners may obtain amounts of up to \$50,000 to assist with earthquake strengthening. Larger amounts may be considered on a one-off basis. Additional assistance may also be available through the Dunedin Heritage Fund.</p> <p>In addition, Dunedin City Council has established a heritage residential B&B rates category in June 2011. This is available for owners of heritage B&B who were paying commercial rates following assessments by Quotable Value in 2010.</p>
Queenstown Lakes District	The extent of any rates remission will be determined on a case-by-case basis.
Environment Southland	Council officers will be delegated authority to remit 100 percent of rates on those portions of land which qualify.
Invercargill City	Council will decide what amount of rates will be remitted on a case-by-case basis.
Southland District	Council will grant a 50 percent remission of general rates. Where only part of a rating is affected, a separate rateable assessment will be required to be established for the area involved.

Appendix 6.

Summary of other types of incentives provided by local authorities

Other type of local authority incentives, as at October 2012

Council	Summary
Waitomo District	Possible assistance towards professional advice/information or the preparation of a conservation plan.
Gisborne District	Annual plan provisions for: i) two hours of free advice from a heritage consultant for items scheduled in the Post European Contact Schedule in respect of conservation or maintenance, restoration of original architectural elements and shop fronts, adaptive reuse and colour schemes; ii) two hours of free advice from an archaeologist or other suitably qualified person for items scheduled in the archaeological site or waahi tapu schedule regarding the preparation of a conservation or management plan; iii) heritage paint fund available to owners of heritage buildings on the Central Business District Schedule; and iv) a fencing fund to facilitate the protection of significant archaeological sites.
Central Hawkes Bay District	Funding is available for the identification of historic sites that arise from any subdivision or resource consent applications.
Hastings District	Subject to funding being available the Council will assist landowners to enhance the heritage nature of the building by the use of grants to upgrade and paint the facades of buildings above veranda height.
New Plymouth District	Up to two hours of Council paid architectural advice and up to one hour of Council paid colour scheme advice by the Council's advisors is available for buildings listed in the Councils Heritage Inventory, to promote design and colour compatible with the heritage values of the building.
Horowhenua District	Possible offer of low-interest loans in the protection of heritage features.
Manawatu District	There are low-interest loans for people who for some reason are ineligible for funding grants or rates remission.
Kāpiti District	Financial contributions for fencing and a range of other protective measures.

Other type of local authority incentives, as at October 2012


Council	Summary
Hutt City	Council to subsidise on a case-by-case basis basic consultant fees for conservation advice for heritage buildings. Council offers to provide free advice to owners of heritage buildings on how to conserve heritage buildings in accordance with Council policies and other statutory requirements.
Masterton District	Fencing fund to protect significant archaeological sites. Applications will be considered according to: the level of threat and potential damage that could result if the site remained unfenced; and the significance of the archaeological site based on its uniqueness, representative nature, condition and importance to tangata whenua, the community and landowner.
Porirua City	Possible low interest loans, free information and assistance.
Nelson City	Heritage awards are being investigated.
Christchurch City	Council continues to offer heritage advice at no charge to the building owner, recognising the importance of this as an incentive for heritage protection.
Otago Regional	To provide for parking demand in the Business Resource Area through the provision of public car parking development except for on-site requirements associated with large traffic-generating activities. On-site requirements for parking may be relaxed where this will result in retention of a heritage item that would otherwise be lost.

Other type of local authority incentives, as at October 2012

Council	Summary
Dunedin City	<p>Awards for individuals or groups in recognition of restoration or protection of heritage items; Free advice on architecture and design to owners of heritage items; Repainting initiative: buildings identified as having heritage value with the Heritage Precinct are eligible for a financial contribution upon repainting. Initiatives are only granted where the repainting is in accordance with the principles outlined in the Council's Renovation and Colour Guidelines. The contribution is calculated at \$20 per lineal metre of building viewed from the street for every storey of the building. A contribution of \$10 per lineal metre of verandah paint is also available. The Council may award greater contributions for the repainting of heritage buildings with unique characteristics such as ornate decoration. Free advice to help in planning heritage improvements. Promote pre-application meetings to discuss options when undertaking work on a heritage building. Can bring together a heritage project team consisting of a Building Control Officer, Resource Consent Planner, and Heritage Planner to work with applicants during the consent process. Awards for individuals or groups in recognition of restoration or protection of heritage items. There are now awards for earthquake strengthening, heritage interior restoration, and re-use of a heritage building. Each receives a certificate, plaque and \$1,500 prize. These are awarded at the Dunedin Heritage Re-use Awards in March annually. \$70,000 in the Warehouse Precinct Heritage Area for heritage reuse assistance in 2012/2013 only.</p>
Invercargill City	<p>In order to promote quality development and redevelopment in the city centre the Council awards Civic Plaques to projects including those contained within the City Centre Heritage Precinct that comply with the guidelines and contribute to the vibrancy of the city.</p>

Appendix 7.

Summary of Auckland City Central Area District Plan, heritage floor space bonuses granted and recipient sites (as at May 2009)


CITY PLANNING

HERITAGE FLOORSPACE BONUS REGISTER

SUMMARY OF HERITAGE FLOORSPACE BONUS GRANTED

Site Address Where Bonus Granted		Building Description	Heritage Floor Space Bonus Granted	
St No	Street Name		Transitional Plan m2	Operative 2004 Plan m2
30-32	Airedale Street	Two Terraced Houses		853
2-8	Chancery Street	Chancery Chambers		9,040
36-38	Customs Street East	Australis House	5,364	
42-42	Customs Street East	A H Nathan Building	8,355	
12-32	Customs Street West	Former Customs House		10,000
9-11	Durham Lane	Bluestone Stone		5,035
3	Eden Crescent	Eden Hall		5,590
19a	Princes Street	Former Synagogue	1,650	
19	Princes Street	Northern Club		6,677
12	Queen Street	Former Chief PO	31,882	
269-285	Queen Street	Civic Theatre		6278
301-303	Queen Street	Town Hall	41,484	
187-189	Queen Street	AFPE Bldg	11,406	
118-124	Queen Street	Vulcan Bldg	4,250	
136-146	Queen Street	Elison Chambers		294
2	Symonds Street	St Andrews Church	5,295	
28	Symonds Street	St Pauls Church	10,000	
86-70	Wellesley Street	St Matthews in the City	28,229	
			150935	41757
		Total HFS Bonus Granted	192692	



HERITAGE FLOORSPACE BONUS REGISTER

SUMMARY OF RECIPIENT SITES

Site Address Where Bonus Granted		Bonus M ² Floorspace Received or Retained	Bonus M ² Floorspace Transferred Oward
76-84	Albert Street	2,938	97
92-96	Albert Street (191 Queen Street)	1,110	
9-11	Commerce Street	454	
54	Cook Street	97	
23	Customs Street East	154	
73-83	Customs Street West	25,000	
15-25	Durham Street West (171 Queen Street)	2,127	2,123
150-152	Fanshawe Street	1,447	
65	Fort Street	6,147	3,905
12	High Street	23,271	
10-18	Hobson Street	518	
49	Hobson Street	820	
6-10	Kitchener Street	2,500	
2-10	Princes Street	3,580	
132-138	Quay Street	2,800	
188-194	Quay Street	3,215	
45	Queen Street	667	
151	Queen Street	1,541	
80	Queen Street	3,592	
21	Queen Street	1,956	

28-32	Shortland Street	0	10,296
42	Shortland Street	9,404	
37	Turner Street	2,123	
11	Union Street	310	
167	Victoria Street West	3,965	
152-170	Victoria Street West	1,057	
56-57	Wakefield Street	4,294	
		105,087	16,481

SUBMISSION

SOUTH WAIRARAPA DISTRICT COUNCIL ANNUAL PLAN 2017-18

Thank you for the opportunity to submit against your Annual Plan 2017-18.

Sport Wellington is the independent body for sport and recreation. We were established in 1990 with charitable status under the Charities Act. Our main funding partners are Sport NZ, New Zealand Community Trust, Eastern and Central Community Trust, Ministry of Health, and Wellington Community Trust. We are one of 14 Regional Sports Trusts (RST) operating throughout New Zealand.

We operate within a wide geographical area, spanning the region between Otaki in the west across to Masterton in the east and Wellington City in the south so have a regional focus. We are committed to everyone in the greater Wellington region having a life-long involvement in sport and active recreation and provide region-wide leadership and support to the sport and active recreation community wherever they are in the region. We have an office in Wairarapa where our dedicated team works across a wide range of areas.

The spectrum of our work covers sport, recreation and health and we have a strong focus on realising the value of sport and active recreation through increased participation. Regularly participating in sport and active recreation creates a wide range of benefits to individuals, communities, our region and the nation. Some of the proven benefits are outlined below.

Health	Social	Personal	Community	Economic
Contributes to higher levels of self-esteem and self-worth	Creates positive alternatives to youth offending, antisocial behaviour and crime	Empowers, inspires and motivates individuals	Provides opportunities for social interaction	Eases pressure on the health system
Reduces stress and helps to manage depression and build resilience	Provides work/life balance	Kids who participate learn better and are more likely to enjoy school	Creates opportunities for, and promotes, volunteering	Healthy workers are more productive and take less sick days
Promotes a healthy, active lifestyle	Provides opportunities to develop friendships	Develops life skills and leadership abilities	Clubs can become hubs of communities especially in the regions	Reduces pollution – promotes use of active modes of transport like walking and cycling
Tones and strengthens the body		Provides a sense of belonging	Binds families and communities through shared experiences	Creates employment opportunities
Reduces obesity		Contributes to lifelong learning	Fosters community pride and strengthens social networks	Economic growth through business investment, employment, major events and tourism
Can help to prevent cardiovascular disease, diabetes and some cancers		Supports and enhances cultural values and identity		

Sport Wellington provides regional leadership through four core activities: building partnerships; sharing knowledge about sport and active recreation; providing subject matter expertise where required; and advocating on behalf of the sector and others in order to bring positive change to the region.

We view councils as key partners in the provision of sport and active recreation opportunities and wish to signal our intent to further develop our current relationships into more complementary partnerships in order to align goals, outcomes and objectives where appropriate.

Sport Wellington operates as a 'knowledge gatherer' as a consequence of the relationships we hold with key sport and recreation organisations including Sport NZ. We are able to provide relevant and valuable insights and knowledge relating to sport and active recreation that can inform planning and decision making.

We advocate on behalf of the sport and active recreation sector particularly on issues that are common across the sector. In this role we can become a conduit for information both to and from sport and recreation groups which may be beneficial for Councils in their sport and recreation planning in areas such as facility and sportsfield provision and programme development.

Currently many of the regional sport organisations (RSOs) are facing a range of issues/challenges as they work to grow participation. Some of these challenges are likely to be similar to those faced by Councils and include:

- The changing demographic make-up of some of our communities (both in terms of population groups and population growth or decline) changes demand for sport and recreation opportunities and experiences. This means that sports need to be able to respond quickly to change and adopt a more targeted approach to provision. This places strains on planning and programme development and capability development.
- Changing participation trends affect the way people want to participate. Currently the trend is towards more casual sport and recreation options which are outside of current organised provision putting pressure on the traditional membership model.
- Demand for access to facilities remains strong. This becomes a challenge when balancing the needs of all community users. A particular issue for sports is having consistent experiences across the region and meeting the costs of facility use.
- Some sports own their facilities and for some this is becoming a burden as a result of increasing maintenance costs and ensuring optimum usage to generate income. Increasingly they must consider the long-term value of ownership and investigate code-sharing (although many older facilities have been purpose-built for a specific sport /activity).
- In addition, as new forms of sporting activities arise, demand for spaces and places changes. A good example of this is futsal. Football traditionally requires access to sports fields while this version is generally played indoors increasing the demand for indoor space in competition with other indoor sports.
- RSOs, like their national counterparts, are reliant on gaming funding as a main source of other income. There is risk associated with this funding as legislative change impacts distribution and access.
- Additionally, these organisations are operating in an increasingly competitive financial (funding and sponsorship) environment. There are challenges too around balancing income between user pays and other sources where getting the balance wrong may impact on participation growth.
- Most, if not all, sport and recreation organisations are reliant on volunteers to help run their businesses and provide services to participants. Recent studies show that the number of volunteers

has remained at about the same levels while the number of volunteer hours has reduced by almost 42%.

Sport Wellington work in South Wairarapa

Sport Wellington either leads or supports a number of sport and active recreation focused programmes of work in South Wairarapa (or in the region including South Wairarapa).

KiwiSport is a fund provided to Sport Wellington by Sport NZ to distribute to schools and community groups to support young people to develop skills and have access to coaching and other positive sport experiences. Our KiwiSport investment funds hockey, rugby, netball and fundamental movement skill development opportunities for young people in South Wairarapa. All primary schools in the district and Kuranui College have been involved in some way. We have also provided KiwiSport investment in support of Greytown Sport and Leisure.

Through our Sport Wellington Wairarapa office we work with key regional sport organisations (including rugby, cricket, hockey, netball and tennis) and through them, we are able to provide support to local clubs. To date we have developed MOUs and associated work programmes with key sports including: Netball Wairarapa, Wairarapa Hockey, and Wairarapa Cricket. The focus of this work is on building capability whether it is through helping to improve:

- planning
- leadership and governance
- volunteer management

We work closely with secondary schools to ensure there are opportunities for secondary school students to participate and compete. Through this latter work we have succeeded in having the highest participation levels in New Zealand.

We established and manage the Wairarapa Coaching Hub which is designed to increase the number of coaches available to sport in the region. We are particularly focused on young people as coaches providing coaching services to others. For sports organisations and secondary schools we run coach development programmes on request and provide support for performance athletes and coaches through the Sport Wellington Performance Hub.

Through our contract with the Ministry of Health we run Healthy Lifestyles programmes that include Green Prescription and Active Families and a new programme this year – Maternal Green Prescription - for targeted groups in South Wairarapa.

The development of the Wellington Region Sport and Active Recreation Strategy is being led by Sport Wellington on behalf of providers across the region with a view to driving greater collaboration in order to make better use of the resources currently available to sport and active recreation. We acknowledge South Wairarapa District Council's support for this work to date and hope that you will be in a position to formally endorse the strategy in the near future.

Funding request

We again ask for your ongoing financial commitment of **\$5,000** (excl GST) in support of the work of the Sport Wellington Wairarapa office in your community. We are also asking for your consideration of investment in the implementation of the Regional Sport and Active Recreation Strategy as follows:

- \$1,000 per annum for the next three years to support Sport Wellington's role as the backbone organisation for the implementation, monitoring and evaluation of the strategy and

- \$750 one-off payment for 2017-18 towards the completion of a Regional Spaces and Places (facilities) plan.

Specific feedback on Annual Plan proposals

We would firstly acknowledge the work that SWDC undertakes to maintain parks, reserves and other amenities that support people being active. Physical activity in its variety of forms contributes to your stated community outcomes, in particular healthy people, vibrant and strong communities and a place that is easy to access and get around.

In South Wairarapa the most common form of physical activity is walking (higher than the national average) followed in order by cycling/biking, jogging/running, fishing and swimming.

It is within this context that we indicate our support for the proposed removal of the admission cost to the pool. While the cost is already low, for some groups, cost at this level continues to be a barrier to participation when considered alongside the other costs associated with participation such as transport, equipment etc.

We would also support the emphasis on improving urban footpaths and road crossings. Walking is the main way in which people in the district are active whether that is as a form of recreation or active transport and walkers, both local and visitors to the district, are encouraged by having a reliable network of good walking surfaces and safe walking experiences.

Thank you again for the opportunity to comment on your Annual Plan 2017-18.

We would be happy to discuss our submission further with you at a hearing in May.

Kind regards



Phil Gibbons
Chief Executive

From: Ashworth [mailto:
Sent: Friday, 12 May 2017 4:00 p.m.
To: Suzanne Clark - Committee Secretary
Subject: Consultation Feedback

Roading:

I support deferring some roading rehabilitation to redirect funds to new footpaths.

In particular, a footpath along Underhill Road, Featherston, at least as far as the pedestrian gates to the sports fields, would be wonderful. Public safety is paramount – children especially,.

Regards
Rhonda Ashworth

Application to present to the South Wairarapa District Council Annual Plan

On behalf of the Five Towns Trails Trust

The Five Towns Trail Trust:

The Trust is being developed : “ to attract and manage investment of funds to deliver a recreational cycling strategy for the Wairarapa”. This is our agreed Mission Statement.

Discussions between the two existing Trail Trusts (Greytown Trails Trust and Trails Wai. Trust) have identified the need to have an umbrella overarching view based on the Central Otago Queenstown Trails Steering Trust concept.

Working with Destination Wairarapa and Stewart Edwards of Green Jersey CycleTours we have appointed the following trustees:

- Phil Holden: (Chair) former CEO of Lion Foundation,
- Bob Francis
- Clive Paton
- Adrienne Staples
- Paora Ammunsen
- Bob Tosswill: founding Trustee of the Greytown Trails Trust.
- Rob Irwin, Chair of Trails Wai. Trust.
- Stan Braaksma, trustee of Trails Wairarapa Trust

The Trust has appointed Catherine Rossiter-Stead as Exec Officer on a contracted basis.

With our proximity to Wellington and the Rimutaka Cycle Trail being our local link and Great Ride, the South Wairarapa is well positioned to be the primary beneficiary of a coordinated Wairarapa approach.

The Trust recognises the considerable burden on ratepayers from the recent unprecedented tourism growth and therefore seeks support in more practical rather than financial areas, such as:

- Support for our overall regional strategy
- Support for our funding approach to NZTA in conjunction with Greytown Trails Trust
- Support for the approach to WREDA for Businessplan funding
- Support for the Huri Huri request from Catherine Rossitter Stead

We wish to work with the District Councils to co-ordinate all stakeholders to showcase the great opportunities the Wairarapa has to offer for recreation.

We will outline progress the Greytown Trail Trust has made with a suspension bridge over the Tauherenikau River to link Greytown with the huge market of Wellington as Stage 1 of developing a western access over the three rivers to Masterton.

The Trust would like to present to your Council,

Sincerely,

Bob Tosswill (On behalf of Five Towns Trail Trust)



WAIRARAPA BALLOON FESTIVAL

PO Box 444, Masterton, New Zealand
Ph:(06) 370 6263 email: wairapaballoons@gmail.com web:nzballoons.co.nz

Our Objectives : promote the economic development of the Wairarapa region, and engender community pride in the residents of the Wairarapa.

Events Grant Application to the South Wairarapa District Council

Dear Mayor Viv and Councillors

We are in the early stages of planning for next year's event, but tentatively the Wairarapa Balloon Festival will be held over Easter weekend, late March 2018.

We believe there was more than enough interest from the public in the 2017 Easter event to justify again holding our event over Easter in 2018. Traditionally Easter weekend was quiet in the Wairarapa and we saw a great opportunity for attracting visitors to the Wairarapa. This proved to be the case, despite Cyclone Cook trying its hardest to disrupt the event.

We believe the 2017 event can be counted a success, despite only managing one morning flight out of five days scheduled. The wet weather in the lead up to and during the event was not ideal - hot air ballooning is very weather dependent. Never-the-less we had a very successful children's event in QE Park, a well-attended Night Glow and a spectacular flight over Martinborough with loads of people coming out to enjoy the balloons taking off. Whilst we didn't manage to have the balloons flying out of Greytown, we had a large number of people turn up to the Soldiers Memorial Park to see balloons inflate, and meet the pilots. Our lead-up promotion generated a huge amount of interest and promotion of the Wairarapa. The subsequent coverage of the 2017 Balloon Festival was all very positive, including the Dominion Post facebook cover banner using a photo from the Martinborough ascension!

We will work with Destination Wairarapa to identify the economic impact of the 2017 event. With over 5,000 people attending the Night Glow, most of whom were from outside the region, we believe the event continues to fulfil one of its key drivers – the economic development of our region.

We are seeking the support of South Wairarapa District Council (with at least three events planned for South Wairarapa for the 2018 event), along with the other two Councils in the Wairarapa. Hot air balloons and the Wairarapa are a natural partnership – we have a wide, open valley, unrestricted air space and very hospitable landowners where balloons can land. We need the support of the Councils and trusts to ensure the event remains accessible to the public.

It is worth noting that we work closely with the Civil Aviation Authority to ensure the event is safe for all aspects of the flying. Health and Safety for the public is also a key component in our

planning. They have seen real benefits from the employment of a dedicated event management resource and will continue with this in 2018. We also recognise the ability of social media to boost the profile of the event and the region. We will continue to work with Destination Wairarapa to assist with promotion of the 2018 event.

We are committed to the Balloon Festival remaining an iconic and key feature of the Wairarapa and greater Wellington region's event calendar and would like an opportunity to present our submission to Council to support our request for a grant of \$5,000.

Thank you for considering our application, and we look forward to presenting our submission.

Yours sincerely

Robyn Cherry-Campbell

Event Manager

Wairarapa Balloon Society Inc.

**Wairarapa Balloon Society Inc.
Statement of Revenue & Expenditure**

Actual 2016	Budget 2017			Draft Budget 2018
-	30,000	INCOME	Trust House Foundation*	30,000
12,000	10,000		MDC	10,000
5,000	4,000		CDC	5,000
3,000	-		SWDC	5,000
2,000	-		Other Charitable Grants	-
20,000	20,000		Business sponsorship	25,000
<u>42,000</u>	<u>64,000</u>			<u>75,000</u>
64,518	20,000	Other Income	Gate Income - Night Glow	27,500
249	500		Interest	500
5,215	3,500		Other recoveries	4,000
<u>111,981</u>	<u>88,000</u>		TOTAL INCOME	<u>107,000</u>
		EXPENDITURE		
9,613	10,500	Event promotion	- Advertising & promotion	12,500
3,882	4,500		- Flyers, posters, design & print	4,000
<u>13,495</u>	<u>15,000</u>			<u>16,500</u>
13,353	14,000	Ballooning expenses	- Crew breakfasts & other meals	14,000
8,940	9,000		- Event costs	9,000
8,141	12,000		- Special shapes	15,000
1,000	3,000		- Prizes	3,000
4,938	6,000		- Gas	6,000
<u>36,372</u>	<u>44,000</u>			<u>47,000</u>
10,884	12,000	Technical & Venues	- Sound, lighting, power, comms	12,000
5,546	6,000		- NG Entertainment	6,000
7,612	10,000		- Venue costs & signage	10,000
3,100	3,000		- Liability insurance	3,500
10,000	20,000		- Event organisation	25,000
<u>37,142</u>	<u>51,000</u>			<u>56,500</u>
87,009	110,000		TOTAL EXPENDITURE	120,000
\$ 24,972	\$ (22,000)		Event SURPLUS / (DEFICIT)	\$ (13,000)
(6,712)	6,160		Provision for tax on surplus	1,470
22,056	40,316		Opening C/fwd Funds	24,476
<u>\$ 40,316</u>	<u>\$ 24,476</u>		Closing C/fwd funds	<u>\$ 12,946</u>





Feedback must be received by 4pm Friday 12 May 2017.

Please read the consultation document before providing your feedback.

EMAIL: ap@swdc.govt.nz
IN PERSON: Drop form to your local library or the Council Office in Martinborough

BY POST: Fold and affix a stamp

FAX: (06) 306 9373

ONLINE: <http://www.swdc.govt.nz/council-projects-and-open-consultations>

Your name and feedback will be public documents.

All other personal details will remain private.

Ratepayer:

- Urban Rural
- Commercial Non Ratepayer
- Yes I/We would like to speak to our submission

Speaking Preference:

- May 31 am May 31 pm

FIRST NAME: Lee

LAST NAME: Carter

ORGANISATION: -

(Only if authorised to)

EMAIL ADDRESS

POSTAL ADDRESS

PF

Consultation Questions

Wastewater

Do you support continuing to defer the cyclical wastewater underground pipe asset replacement programme to accelerate stage one and two of irrigation to land for Martinborough, Greytown and Featherston?

- Yes No

If not, why?

Blank lines for handwritten response to Wastewater question.

Swimming Pools

Do you support providing free swimming in the three District Council owned pools?

- Yes No

If not, why?

Handwritten response: Absolutely agree - will be good for the youth and families who can't pay on a regular basis - Urban Initiative.

Fees and Charges

Please provide your feedback on the proposed fees and charges for 2017/18.

Handwritten response: Not happy about the fee increases. But understand that in some cases there is a need.

If you would like to comment or propose something different now is your chance. (Continue on another sheet if required)

See attachment

Dog pound at Featherston

Do you support the building of a new dog pound in Featherston?

- Yes No

If not, why?

Handwritten response: Pound to be in Featherston please. If we can get a cheaper pound but still suitable of needs please do so or 120k would be fine as long as it is of excellent standard lasting for 50 years plus.

Roading

Do you support deferring some roading rehabilitation for one year and redirecting funds to new footpaths, footpath maintenance and road crossings?

- Yes No

If not, why?

Blank lines for handwritten response to Roothing question.

Annual Plan Submission from Lee Carter 2017

Horses

Signs to help assist the health and safety of horses and their riders while riding on the roads in the South Wairapa

Horse signs to be erected for horses and their riders. The following are areas that have been suggested as they are popular places for riders and their horses/ponies:

1. Horse riding signs on western lake road - on the lake side of the railway crossing near Viles road leading onto Longwood Road and also down by the Featherston cemetery as there are many riders in that area - also along western lake road where people ride to picnic spots
2. There are a lot of properties popping up on Murphys line that have horses, especially Children riding horses – please erect signs down Murphys line
3. Between Martinborough and Greytown and at the substation as cars just speed past there
4. There is also a lot of riders in Kahutara who suggest that there be beware of horses and their riders signs on the South end of Te Maire Road and between Kahutara and state highway 53

Featherston Swimming Baths

I would like to see a sun cover of some type put over the small children's pools please – the sun is extremely dangerous and harsh for our little ones and as we know the damage for skin cancer starts at an early age. Please be a responsible Council and ensure that our children are safe from the sun and potential skin damage and skin cancer later in life.

Could we also have the babies pool fixed, I noticed that it was empty most of the summer. This makes things very hard for mothers who have a range of aged children and also a toddler as the toddler has no pool to go in unless accompanied by mother in one of the bigger pools. Does make for ease or convenience for many mothers. If we can't have the pool fixed then we should look at having the pool removed or sealed over and an alternative for the toddlers such as a temporary pool.

Affordable housing developments for Featherston

Revisit the 2033 Featherston Strategy where potential growth, businesses and residential housing is outlined as an initiative for the future of Featherston. In particular sustainable leading edge housing that is affordable for working families, especially environmental friendly, community based and wise use of space.

Could to do an investigation for Featherston around available land for development given that Featherston has the infrastructure to cope with a population of 6000

Date 15/05/2017

Memo Mark Allingham

From Dave Patten

Subject Joint Council LED Street lighting Rollout Proposal

LED Street lighting Rollout Proposal

Masterton and Carterton District Councils are preparing a combined tender for the procurement of LED (Light Emitting Diode) Streetlights and we have the opportunity for South Wairarapa to be included in the tender process. Both Councils are planning to convert all streetlights in their respective areas with the exception of State Highways. The work is expected to be completed by 30 June 2018.

NZTA are supporting the councils with the conversion from Sodium to LED's by way of an 85% subsidy subject to a business case being approved. Approved funding is available until 30 June 2018. *Reference NZTA Circular 17/03 dated 06/06/2017.*

Please note South Wairarapa will be required to submit a business case proposal to NZTA.

Benefits

- Traffic Safety – the white light provides better colour contrast and recognition reducing driver reaction times.
- Pedestrian security is improved.
- Reduced spill light behind the fitting and skyward.
- Lower whole of life operational costs (refer to attached PV method spread sheet).
- Energy efficient with reduced energy costs.
- NZTA and EECA (Energy Efficiency and Conservation Authority) support.

This proposal is to rollout the conversion of all existing 70w Sodium street lights and replace with LED lights in conjunction with Masterton and Carterton Councils. This work would be completed in two stages; 1) Tender for the supply of light fittings and 2) Tender for the installation.

The quantities in each of the South Wairarapa towns are as follows;

Town	Quantity
Featherston	230
Martinborough	228
Greytown	175
Pirinoa / Lake Ferry	22
Total	655

Cost Summary

No of lights	Estimated cost per light	Total cost	NZTA Subsidy based on 85%	SWDC cost	Annual estimated Ave cost saving
655	\$545.00	\$356,975	\$303,429	\$53,546	\$31,429

PV method calculations - For road lighting network Part 1

Name of this part of the road lighting network:
 South Wairarapa District Council - P Lights

Ref #	Inputs for calculations	Input values	Unit
1	Energy (energy supply only - excluding Lines Co charge)	8.3329621	c/kWh
2	Energy consumption - HPS units	83	Watts
3	Energy consumption - LEDs units - full output	24	Watts
4	Hours/year	4000	hours
5	HPS lamp replacement cost	109.7	\$ per unit - labour, plant & lamp supply - including traffi
6	HPS lamp life	4	years
7	Annual rate of replacement of HPS luminaires (end of service life)	6.54	Percent
8	Supply cost LED luminaire	425	\$ per unit
9	Installation cost LED luminaire	120	\$ per unit - labour, plant & any materials - including traf
10	LED unit cleaning	50	\$ per unit - labour & plant - including traffic managemen
11	Number of HPS units	655	Units
12	Number of LED units	655	Units
13	Reduced Lines Company charge per LED unit	0	\$/unit/annum
14	Reduction in total energy use if LEDs are dimmed	0	Percent

	Year	1	2	3	4	5	6
Option 1 - Maintain HPS							
20	Energy costs	18,121	18,121	18,121	18,121	18,121	18,121
21	Lamp replacement	17,963	17,963	17,963	17,963	17,963	17,963
22	End of service life luminaire replacement programme	23,346	23,346	23,346	23,346	23,346	23,346
	Annual cash flow	59,430	59,430	59,430	59,430	59,430	59,430
	Cumulative cash flow	59,430	118,861	178,291	237,722	297,152	356,582
	Present value (PV) cost of HPS option - 20 year investment at 6%	681,662 = A					
	Average annual cost	59,430					
	PV - 8% discount rate	583,496					
	PV - 4% discount rate	807,679					

	Year	1	2	3	4	5	6
Option 2 - Replace with LED							
30	Initial cost - supply and install new luminaires	356,975					
31	Energy costs - lights on full output - no dimming	5,240	5,240	5,240	5,240	5,240	5,240
32	Lines Company charge reduction for LED	0	0	0	0	0	0
33	Cleaning costs						32,750
34	Energy cost savings through dimming	0	0	0	0	0	0
	Annual cash flow	362,215	5,240	5,240	5,240	5,240	37,990
	Cumulative cash flow	362,215	367,455	372,694	377,934	383,174	421,164
	Present value (PV) cost of LED option - 20 year investment at 6%	447,706 = B					
	Average annual cost	28,001					
	PV - 8% discount rate	423,816					
	PV - 4% discount rate	476,960					
40	Present value of energy cost savings through dimming	0					

Options compared							
41	Year in which the additional cost of LED conversion is paid back	8					
		0	0	0	0	0	0
42	Present value (PV) cost saving (A-B) - 6% discount rate	233,956					
43	PV cost saving (A-B) - 8% discount rate	159,680					
44	PV cost saving (A-B) - 4% discount rate	330,719					
45	Annual average cost saving	31,429					

Subject	Increased funding assistance for accelerated renewal road lighting LED conversion programmes
Circulation	Asset Managers (all Approved Organisations) Highway and Network Operations (NZ Transport Agency) EECA Local Government New Zealand (LGNZ) Equip SOLGM and EMANZ Electrical Engineers Association Lighting Council of New Zealand Illuminating Engineering Society of Australia & NZ (IESANZ) ACENZ CCNZ Office of the Auditor General
Circulated by	Bob Alkema – National Manager Investment
Date of Issue	6 March 2017

Purpose

This general circular advises of a targeted enhanced funding assistance rate (FAR) of 85% for accelerated renewal LED conversion programmes that have been approved by the NZ Transport Agency and established in terms of [General Circular Investment: No 15/01 Accelerated renewal road lighting LED conversion programmes](#) dated 4 March 2015.

The enhanced FAR will apply to this 2015–18 three year National Land Transport Programme (NLTP) period only. The Transport Agency does not commit to offering this enhanced FAR beyond the end of the 2015–18 NLTP, beyond 30 June 2018.

Summary

The impact of the changes described in this general circular are summarised as follows:

1. This general circular does not alter any of the advice or requirements contained in the earlier general circular No 15/01 *Accelerated renewal road lighting LED conversion programmes* other than to increase the FAR for a Transport Agency approved programme for the period of the 2015–18 NLTP.
2. The FAR for a programme already approved is increased to 85%. Councils that have a programme approved and underway will be paid funding assistance at the 85% FAR for the entire 2015–18 NLTP period. This will require 'back paying' the difference in funding assistance between the normal FAR and the enhanced FAR on previous claims.
3. Any council that has been renewing road lighting, and converting to LED, but has up until now not been treating the programme as an improvement programme, but has been claiming funding assistance under work category 222 *Traffic services renewals*, or work category 341 *Minor improvements* may wish to prepare a business case in the terms set out in general circular 15/01

Accelerated renewal road lighting LED conversion programmes. If that business case is approved by the Transport Agency then the FAR will be increased to 85% and the work category changed to 324 *Road improvements*. Again funding assistance at the 85% FAR will apply to the entire 2015–18 NLTP period.

4. The NZ Transport Agency does not commit to offering the enhanced FAR of 85% beyond the end of the 2015–18 NLTP, beyond 30 June 2018.

Status of previous general circular

This general circular needs to be read in conjunction with the earlier general circular No 15/01 *Accelerated renewal road lighting LED conversion programmes*. It does not alter any of the advice or requirements contained in the earlier general circular. It increases the FAR for a Transport Agency approved LED conversion programme for the period of the 2015–18 NLTP and contains some further advice on these programmes.

General circular No 15/01 established that the Transport Agency wished to invest in partnership with councils in accelerated renewal road lighting LED conversion programmes that were supported by a sound business case. Approved programmes are being funded through work category 324 *Road improvements* and will continue to be funded through this work category but at the enhanced FAR of 85% through to 30 June 2018.

Enhanced FAR offer limitations

Where a Transport Agency approved conversion programme extends beyond 30 June 2018, and into the 2018–21 three year NLTP period, the council should plan on the basis that the normal FAR will apply after 30 June 2018. Councils also need to acknowledge that in strict accordance with the Land Transport Management Act (LTMA) the Transport Agency cannot legally commit to funding any new projects or programmes after that date. Such a commitment cannot be made until the 2018–21 NLTP has been formally approved which we expect to occur in June 2018.

We will need to take care to ensure that this offer of an enhanced FAR, for a limited time, does not reduce the value for money obtained. The Luminaire selection process is critical in this regard. Luminaires must first be fit for purpose. To help ensure value for money the whole of life cost of each fit for purpose option, which will include energy and other operating costs, must be compared. Any luminaire that has not been ‘accepted’ in terms of the M30 [Specification and Guidelines for Road Lighting Design](#) product acceptability testing system would need to be thoroughly assessed by a competent authority to ensure that it was fit for purpose before a decision to purchase was made.

The professional services input required for conversion of vehicular traffic, category ‘V’ lighting in AS/NZS1158 *Road lighting* terms, is substantially greater, and the required skill level higher, than for category ‘P’, pedestrian area low traffic volume road lighting. Consequently the risk of inadequate design, and comprised road safety, is much higher for ‘V’ category lighting. A new LED conversion programme which includes ‘V’ category lighting conversion, to be delivered before 30 June 2018, will require a greater level of scrutiny by the Transport Agency for approval. Any council that does not already have a conversion programme underway is urged to continue to follow the advice given in general circular 15/01 and start with the category ‘P’ roads. Preparation of a business case that is confined to category ‘P’ conversion should be straightforward. The critical value for money decisions will be similarly straightforward assuming an experienced professional is employed and a comprehensive, up to date, inventory of the current lighting system is provided for them.

Settling on a fit for purpose lighting design takes time. Therefore where a council has placed a firm order with a supplier for luminaires before 30 June 2018 the cost of supply of those luminaires may be included in a claim for funding assistance for the 2015/18 NLTP period at the enhanced FAR. Installation of the luminaires must be completed by 31 December 2018.

The Transport Agency does not want this offer of an enhanced FAR to become a reason to purchase and stockpile luminaires, or any other lighting equipment, for installation into the 2018–21 NLTP. Any claim for funding assistance at the enhanced rate will be scrutinised by Transport Agency staff to ensure this is not occurring.

This enhanced FAR will apply to all approved LED conversion programmes across the full three years of this 2015–18 NLTP period

Councils that have approved programmes underway can now claim funding assistance at the 85% FAR for the entire 2015–18 NLTP period. Retrospective funding may be sought for the difference in funding assistance between the approved organisation's normal FAR claimed previously and the 85% enhanced FAR. Your regional Transport Agency Planning & Investment representative will provide specific guidance on how this can be done through Transport Investment Online.

LED conversions that have been treated as renewals or minor improvements

Given that up until now conversion of road lights to LED under either work category 222 *Traffic services renewals*, work category 341 *Minor improvements* or work category 324 *Road improvements* have been funded at normal FARs, we are aware that some councils have chosen not to treat conversion to LED as a separate programme and have not sought Transport Agency approval for such a programme.

Any council that has been renewing road lighting but has not had the programme formally approved may wish to prepare a business case, as set out in general circular 15/01 *Accelerated renewal road lighting LED conversion programmes*, and seek approval in retrospect for that programme. If the programme can be approved by the Transport Agency then the FAR will be able to be increased to 85% for the full three years of this 2015/18 NLTP. Details of the work to date including of the costs incurred will need to be provided to support the case for retrospective approval. Retrospective funding may be sought for the difference in funding assistance between the approved organisation's normal FAR claimed previously and the 85% enhanced FAR.

Procurement considerations

Many councils are collaborating with others in their LED conversion programmes. In particular councils have been buying lighting equipment together to obtain the economies of scale proven to be available.

There appears to be a strongly competitive market for the supply of LED road lighting luminaires. There are currently over 40 different products from more than 15 luminaire manufacturers and a similar number of suppliers on the list of luminaires 'accepted' in terms of the M30 *Specification and guidelines for road lighting design* product acceptability testing system. The [specification and the list of accepted luminaires](#) are published on the Transport Agency's website.

An increased demand for luminaires, brought about by this change in the FAR, is not expected to alter the competitive nature of the market and force prices up. However, councils should continue to collaborate, including buying together.

An increase in the speed of conversion may overstretch the market for the supply of the professional services required. As discussed above the pressure on this limited resource, when category 'V' lighting is to be converted to LED is much higher than when the lighting is category 'P'. Any new approved LED conversion programme will be most unlikely to include conversion of V category lights before 1 July 2018.

The lighting installation services market may also become overstretched. Any council that finds that it is paying a significant premium to convert lighting to LED before 30 June 2018 should raise this issue with their local Transport Agency Planning and Investment Manager.

Including CMS in an LED conversion programme.

General circular 15/01 *Accelerated renewal road lighting LED conversion programmes* and the [PV method spreadsheet tool](#) do not specifically 'promote' the use of a central management system (CMS) but leave the decision to include or not to the council.

The Transport Agency acknowledges that there are many benefits in having a CMS and that many RCAs are ensuring that they do not preclude those benefits being realised in future by ensuring that the LED luminaires they install are 'CMS ready'. The Transport Agency expects that where a CMS is included in a proposal the marginal cost of doing so and the benefits that will accrue will be considered and there will be a sound rationale for inclusion.

Survey of the uptake of LED street lighting

A survey was conducted in early 2016 to establish the speed of conversion to LED across New Zealand. On the basis of the responses received the proportion of all lights converted should now be around 15%. To be able to inform the Ministers of Transport and of Energy Conservation more accurately of the progress being made we intend to repeat that survey within the next month. The survey will include some additional questions relating to the enhanced FAR.

If there are any other ways the Transport Agency or Local Government NZ could help your council to accelerate conversion to LED, please let us know via the survey, or by contacting your local Transport Agency Planning and Investment Manager.

Attachments

There are no attachments to this general circular.

Enquiries

All enquiries relating to this circular should be directed to your local Transport Agency Planning and Investment Manager.



Bob Alkema
National Manager, Investment

Submitted on Saturday, 13 May 2017 - 9:37am Submitted by anonymous user: Submitted values are:

--Submitter Details--

Name: Rosie Collins

Organisation:

Ratepayer: Rural

--Submission Hearings--

Do you want to speak to your submission: No

Speaking preference:

--Wastewater--

Do you support continuing to defer the cyclical wastewater underground pipe asset replacement programme to accelerate stage one and two of irrigation to land for Martinborough, Greytown and Featherston?

If not, why?

--Swimming Pools--

Do you support providing free swimming in Council's three pools?

:

If not, why?

--Dog pound at Featherston--

Do you support the building of a new dog pound in Featherston:

If not, why?

--Roading--

Do you support deferring some roading rehabilitation for one year and redirecting funds to new footpaths, footpath maintenance and road crossings?

If not, why?

--Fees and Charges--

Please provide your feedback on the proposed fees and charges for 2017/18:

--Additional Comment--

If you would like to comment or propose something different now is your chance: I would like to see cycle paths in and around Martinborough, following the winery trail. There are so many cyclists, often 2-abreast or on the wide 4-seater bikes, and it's becoming increasingly dangerous on these 100km/hr roads as this

activity becomes increasingly popular.

Upload submission:

Upload additional information:

The results of this submission may be viewed at:

<http://www.swdc.govt.nz/node/883/submission/846>

Trails Wairarapa Trust (TWT) was founded in 2009. It is a charitable trust with three main aims, facilitation of off-road and on-road trails for residents and tourists, safety, and health and fitness.

We keep being reminded that there is significant unrealised opportunity for cycling activity locally, and that we are now lagging well behind other more proactive regions in New Zealand overseas who are better exploiting the renaissance of and surge of interest in cycling. There are two potential major cycle and walking conduits in the Wairarapa, namely the Ruamahanga river, and the Wairarapa Coast. Trails Wairarapa Trust will continue to promote the Lighthouse to Lighthouse and the Masterton to Lake Ferry Ruamahanga Trail as goals for the future.

We would like our Wairarapa Councils to consider our position on the following:

- **Regional Cycling Body:** Trails Wairarapa Trust has submitted to councils many times in the past on this topic. We can see strength in such a combined Council formed body for the good of the whole of Wairarapa. Councils may wish to hold back waiting on the outcome of the current local body process, but we see no sense in this, our Councils should be leading from the front. Wairarapa regionalisation is happening and a combined cycling and walking strategy is necessary, Masterton District Council has opened the door with its Rural Trails Network Policy paper and we expect our local body leaders will embrace and carry forwards this lead.
- **Huri Huri:** We think an extension of Huri Huri activity, as submitted by Catherine Rossiter-Stead, will be complementary with other current activity such as the work of the 5 Towns Trust. All the towns and localities in the Wairarapa have the potential to benefit significantly from an increased profile for cycling in our area.
- **5 Towns Trails Trust:** This new group is made up of a number of well known and influential Wairarapa people. The Trust has the talent and drive to make a huge difference to cycling in the Wairarapa and also to the Rimutaka Trail, NZCT Great Ride. Trails Wairarapa Trust has two members on the 5 Towns Trust and will work with it to promote cycling in the region. We urge our councils to collaboratively work alongside the 5 Towns Trails Trust in promoting cycling for our region.
- **Masterton District Council Rural Trails Network :** Trails Wairarapa Trust fully supports the adoption of this report. There may be some who take exception to Masterton District Council advising outside its territory, but we feel excited knowing the Wairarapa is one area, and what may benefit one town, will directly or indirectly benefit the region.

Requests to Council

- 1. Set up a combined council Wairarapa Walking and Cycling Group to lead these activities in the Wairarapa**

- 2. Endorse the Huri Huri concept as proposed by Catherine Rossiter- Stead**

- 3. Acknowledge the 5 Towns Trails Trust**

- 4. Endorse the Masterton District Council Rural Trails Network.**

- 5. Provide adequate funding for numbers 1, 2, and 4 above**