



Notice is hereby given that a meeting of the Stewart Island/Rakiura Visitor Levy Subcommittee will be held on:

Date: Tuesday, 10 June 2025
Time: 9:45am
Venue: Pavilion, 7 Ayr Street, Oban, Stewart Island

Stewart Island/Rakiura Visitor Levy Subcommittee Agenda OPEN

MEMBERSHIP

Chairperson	Councillor Julie Keast	
Members	Lyndon Cleaver	ISS McKay
	Aaron Conner	Stewart Island/Rakiura Community Board
	Lania Edwards	Local Iwi
	Bruce Ford	Stewart Island/Rakiura community representative
	Bill Moffatt	South East Air
	Paul Norris	Real NZ
	Bruce Robertson	Chair - Finance and Assurance Committee
	Jon Spraggon	Local councillor

IN ATTENDANCE

Committee advisor – Fiona Dunlop
Community partnership leader – Karen Purdue

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Website: www.southlanddc.govt.nz

Full agendas are available on Council's website
www.southlanddc.govt.nz

Note: The reports contained within this agenda are for consideration and should not be construed as Council policy unless and until adopted. Should Members require further information relating to any reports, please contact the relevant manager, Chairperson or Deputy Chairperson.

Health and safety

Toilets – The location of the toilets will be advised at the meeting.

Earthquake – Drop, cover and hold applies in this situation and, if necessary, once the shaking has stopped we will evacuate the building to a safe location.

Evacuation – Should there be an evacuation for any reason please exit via the exits indicated at the venue.

Phones – Please turn your mobile devices to silent mode.

Recording - These proceedings may be recorded for the purpose of live video, both live streaming and downloading. By remaining in this meeting, you are consenting to being filmed for viewing by the public.

Terms of Reference – Stewart Island/Rakiura Visitor Levy Allocation Subcommittee

TYPE OF COMMITTEE	Subcommittee
SUBORDINATE TO	Stewart Island/Rakiura Community board
LEGISLATIVE BASIS	Subcommittees delegated powers by Council as per schedule 7, clause 32, LGA 2002.
MEMBERSHIP	<p>The subcommittee consists of the following members appointed by Council:</p> <p>Chairperson:</p> <p>The chair of the subcommittee for the 2022 to 2025 triennium will be Councillor Julie Keast.</p> <p>Members:</p> <ul style="list-style-type: none"> • a representative from or recommended by each of the approved operators named under the Stewart Island/Rakiura Visitor Levy Policy • one community board representative • the chair of the Finance and Assurance Committee • a member from Stewart Island/Rakiura • a member to represent iwi • the councillor for Stewart Island/Rakiura Ward
QUORUM	Majority of members
FREQUENCY OF MEETINGS	One meeting per annum or as required
SCOPE OF ACTIVITIES	The Stewart Island/Rakiura Visitor Levy Allocation Subcommittee is responsible for governance of the Stewart Island/Rakiura visitor levy fund and setting strategic objectives to act as the basis for assessing applications for funding.
DELEGATIONS	<p>The Stewart Island/Rakiura Visitor Levy Allocation subcommittee shall have the following delegated powers and be accountable to Council for the exercising of these powers:</p> <ol style="list-style-type: none"> determining strategic outcomes for the Stewart Island/Rakiura visitor levy fund making decisions regarding funding applications to the Stewart Island/ Rakiura visitor levy fund. setting policy in relation to the collection and enforcement of the Stewart Island/Rakiura visitor levy.

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C8.1	Stewart Island Visitor Levy funding allocations May 2025 funding round - application from Stewart Island/Rakiura community board - Golden Bay Walkway project

1 Apologies

At the close of the agenda no apologies had been received.

2 Leave of absence

At the close of the agenda no requests for leave of absence had been received.

3 Conflict of interest

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

4 Extraordinary/urgent items

To consider, and if thought fit, to pass a resolution to permit the committee to consider any further items which do not appear on the agenda of this meeting and/or the meeting to be held with the public excluded.

Such resolution is required to be made pursuant to Section 46A(7) of the Local Government Official Information and Meetings Act 1987, and the chairperson must advise:

- (i) the reason why the item was not on the agenda, and
- (ii) the reason why the discussion of this item cannot be delayed until a subsequent meeting.

Section 46A(7A) of the Local Government Official Information and Meetings Act 1987 (as amended) states:

"Where an item is not on the agenda for a meeting,-

- (a) that item may be discussed at that meeting if-
 - (i) that item is a minor matter relating to the general business of the local authority; and
 - (ii) the presiding member explains at the beginning of the meeting, at a time when it is open to the public, that the item will be discussed at the meeting; but
- (b) no resolution, decision or recommendation may be made in respect of that item except to refer that item to a subsequent meeting of the local authority for further discussion."

5 Confirmation of minutes

- 5.1 Meeting minutes of Stewart Island/Rakiura Visitor Levy Subcommittee, 17 September 2024

6 Public participation

Notification to speak is required by 12noon at least one clear day before the meeting. Further information is available at www.southlanddc.govt.nz or by phoning 0800 732 732.



Stewart Island/Rakiura Visitor Levy Subcommittee OPEN MINUTES

UNCONFIRMED

Minutes of a meeting of Stewart Island/Rakiura Visitor Levy Subcommittee held in the Stewart Island Pavilion, Ayr St, Oban on Tuesday, 17 September 2024 at 11:00 am (11.01am – 12.14pm)

PRESENT

Chairperson	Cr Julie Keast	(via video link)
Members	Aaron Conner	Stewart Island/Rakiura Community Board chair
	Bruce Ford	Community representative
	Bill Moffatt	South East Air
	Jon Spraggon	Local councillor

APOLOGIES

Lyndon Cleaver	ISS McKay
Lania Edwards	Local Iwi
Paul Norris	Real NZ
Bruce Robertson	Chair of the Finance and assurance committee

IN ATTENDANCE

Committee advisor	Kirsten Hicks
Community partnership leader	Karen Purdue (via video link)
Group manager, community and wellbeing	Sam Marshall (via video link)
Strategic manager transport	Hartley Hare (via video link)

1 Apologies

There were apologies from Lania Edwards, Lyndon Cleaver, Paul Norris and Bruce Robertson.

Moved Cr Jon Spraggon, seconded Aaron Conner and **resolved:**

That the Stewart Island Rakiura Visitor Levy Subcommittee accepts the apologies.

2 Leave of absence

There were no requests for leave of absence.

3 Conflict of interest

Cr Jon Spraggon and Aaron Conner declared an interest in item 7.1 **Stewart Island/Rakiura Community Board application - Gravel walking track from Ayr Street (on Golden Bay road) to Southern end of Traill Park**, and refrained from voting.

4 Extraordinary/urgent items

There were no extraordinary/urgent items.

5 Confirmation of minutes

Resolution

Moved Cr Jon Spraggon, seconded Aaron Conner **and resolved**

That the Stewart Island/Rakiura Visitor Levy Subcommittee confirms the minutes of the meeting held on 13 June 2024 as a true and correct record of that meeting.

6 Public participation

There was no public participation.

Reports

7.1 Stewart Island/Rakiura Community Board application - Gravel walking track from Ayr Street (on Golden Bay road) to Southern end of Traill Park

Record No: R/24/9/55932

Community partnership leader Karen Purdue and Strategic manager transport Hartley Hare were present for this report.

Subcommittee member Paul Norris was unable to be at the meeting and was sorry he couldn't be there to discuss the item.

He had sent an email to the Subcommittee with his comments to the application.

Mr Norris advised in his email that he had had a chance to review the application and felt that unless he had missed anything it left more unanswered questions than answered questions.

He asked that on the basis we will be looking for further funding to complete other sections of the path through to Golden Bay:

- What are the likely future costs going to be for full project – which could be well in excess of \$500,000 he suspects.
- Whilst it is a worthwhile project – he would like to see a five year forward cash-flow reflecting full cost and see what impacts this has against other projects that could come forward – i.e. what is left to support other initiatives?
- Operators would still end up putting people back on to the roadway at either end of Traill Park – on basis they are continuing through to Golden Bay wharf. Where is the following year plan to continue this project?
- Struggling to understand the need to “redo” the gravel in front of Traill Park – surely, it would be better off holding off doing this till we have completed (or done at same time when funds allow), the timber step section - it just seems like we are spending funds to “equal \$200k”
- The funds a couple of years ago from recollection that were paid to put together a feasibility plan for this project – has this all been spent/incurred – did this lead to an indicative overall budget estimate for project?

He had a firm view that there should be a fully costed “whole-off” project which the feasibility funds be put towards as he recalled and then stage the whole project over a three to five-year period of time, knowing the whole project cost/balanced against a cash-flow (or loan from Council) to support this important piece of work. Mr Norris advised of his apologies that if he has missed an important piece of information that is not aligned with these comments.

The subcommittee discussed the following points:

- email from Paul Norris – received and considered
- the construction method was discussed (including appropriate drainage, soil disposal, existing waste water pipes, existing power pole and the manhole situated near the entrance track to the pavilion)
- the revised application from the community board now includes a gravelled track which was not in the original application. This raised several questions – why was it included when the subcommittee asked for application to be resubmitted in order to clarify pricing discrepancies and incorrect identifying of the project involved? It was felt that this gravel track is outside the scope of the original application
- the relevance of the proposed work to the Golden Bay masterplan was also questioned by the subcommittee. They were informed that the master plan has not yet been finalised, and that the community board did not intend to have the walking track moved down onto Traill Park
- funding options for further parts of the Golden Bay masterplan were briefly discussed
- it is perceived that the community would benefit from having the gravelled track included, but the critical areas for safety purposes would be either end of the track instead of the midsection

- members of the subcommittee asked that in future applications there should be an indication of the cost of the overall project, with more detailed pricing for the area being applied for. It was acknowledged that it is beneficial to keep project time-frames loose in case of priorities changing due to unforeseen events
- a way forward was discussed, with the community board prioritising their projects in October, with requests to staff so an application can be fully scoped and ready for the next visitor levy funding round. Applications for this close 9 May 2025.

The subcommittee also noted that there were two recommendation c) in the report, and therefore corrected the second recommendation to d).

Resolution

Moved Bruce Ford, seconded member Bill Moffatt **recommendations a to c, with changes to d as indicated with a ~~strike through~~, and resolved**

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- a) receives the report titled “Gravel track construction Ayr Street (on Golden Bay Road) to the southern end of Traill Park.”
- b) Determines that this matter or decision be recognised as not significant in terms of Section 76 of the Local Government Act 2002.
- c) Determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the Act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to deciding on this matter.
- d) ~~Approves/~~declines a grant of up to \$200,000 to the Stewart Island/Rakiura Community Board for costs associated with construction of “Gravel walking track Ayr Street (on Golden Bay road) to the southern end of Traill Park.”

The meeting concluded at 12.14pm.

CONFIRMED AS A TRUE AND CORRECT RECORD OF A
MEETING OF THE STEWART ISLAND/RAKIURA
VISITOR LEVY SUBCOMMITTEE HELD ON TUESDAY
17th SEPTEMBER 2024.

DATE:.....

CHAIRPERSON:.....

Stewart Island Visitor Levy funding allocations - May 2025 round

Record no: R/25/5/21946

Author: Kathryn Cowie, Community liaison officer

Approved by: Sam Marshall, Group manager customer and community wellbeing

☒ Decision

☐ Recommendation

☐ Information

Purpose

- 1 The purpose of this report is for the Stewart Island/Rakiura Visitor Levy Subcommittee to consider applications received for the 2025 funding round.

Executive summary

- 2 The Southland District Council Stewart Island/Rakiura Visitor Levy Fund is available to groups and organisations to assist with projects, activities and/or services used by visitors; for the benefit of visitors; or to mitigate the adverse effects of visitors on the environment of the island.
- 3 There is one funding round per year, closing on the second Friday of May.
- 4 The financial report as at 30 April 2025 and summary of applications received for consideration for this funding round, are contained in the report for review and approval. Committee members have been given copies of the full applications prior to this meeting.
- 5 There is \$296,100 budgeted for grants this financial year, \$54,617 is already committed from previous years leaving an available budget of \$241,483. There is \$674,470 in total available in reserves to distribute.
- 6 Seven applications have been received, with requests totalling \$569,396 for this financial year, and \$20,000 in the next financial year as one applicant has a multi-year request.
- 7 The \$54,617 committed for this financial year is from a multi-year request from the 2024 funding round (\$34,688) and a loan repayment (\$19,929).
- 8 Six applications are being considered in this report, and one application is to be considered in a separate report in the public excluded section of the meeting, due to sensitive commercial information contained in the application.
- 9 The applications are included in this report. Please note that the attachments to the applications (including financials) are not included in this report as they contain information sensitive to applicants' privacy. These attachments were provided to the Subcommittee with the applications for their perusal prior to the meeting.

Recommendation

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- a) receives the report titled "Stewart Island Visitor Levy funding allocations - May 2025 round".
- b) determines that this matter or decision be recognised as not significant in terms of Section 76 of the Local Government Act 2002.
- c) determines that it has complied with the decision-making provisions of the Local Government Act 2002 to the extent necessary in relation to this decision; and in accordance with Section 79 of the act determines that it does not require further information, further assessment of options or further analysis of costs and benefits or advantages and disadvantages prior to making a decision on this matter.
- d) notes that there is \$674,470 held in the Stewart Island/Rakiura Visitor Levy Fund reserves.
- e) notes that the budget for allocation of grants from the Stewart Island/Rakiura Visitor Levy Fund for the 2024/25 financial year is \$296,100 with \$54,617 already committed compared with the requested funding of \$569,396.
- f) receives applications from the following organisations:
 - 1. Stewart Island / Rakiura Community Board
 - 2. Stewart Island Promotions Association
 - 3. Lord Family Trust
 - 4. Stewart Island Promotions Association
 - 5. Rakiura Heritage Trust
 - 6. Future Rakiura
- g) approves/declines a grant of \$15,000 to the Stewart Island Rakiura Community Board to assist with costs associated with installing information panels in four locations on Stewart Island.
- h) approves/declines a grant of up to \$40,000 (\$20,000 per year for two years) to the Stewart Island Promotion Association for costs associated with employing an events and promotions manager.
- i) approves/declines a grant of \$7,582 to the Lord Family Trust to assist with costs associated with the Millar's Beach Restoration project.
- j) approves/declines a grant of \$1,043 to the Stewart Island Promotions Association to assist with the free waterfront Wi-Fi project.
- k) approves/declines a grant of \$17,391 to the Rakiura Heritage Trust to assist with their operational costs.
- l) approves/declines a grant of \$8,380 to Future Rakiura for costs associated with a two-year sea lion study and information material.

Background

- 10 The Southland District Council (Stewart Island/Rakiura Visitor Levy) Empowering Act 2012 was passed into law on 26 March 2012. The act empowers Council to set and collect levies and obtain revenue from visitors to Stewart Island/Rakiura through the implementation of the Stewart Island/Rakiura Visitor Levy Policy.
- 11 Under the act, funds must be used to better provide services, facilities, amenities for island visitors, or mitigate environmental effects.
- 12 In 2018, the Stewart Island/Rakiura Visitor Levy Policy was reviewed and in 2019 the new Stewart Island/Rakiura Visitor Levy Policy Bylaw was implemented, with minor amendments in December 2023 (a copy of the policy is attached).
- 13 The Stewart Island/Rakiura Visitor Levy Bylaw outlines levy collection from visitors who travel to the island via private or chartered transportation. Only one payment is required per person for the duration of their stay on the island.
- 14 The Stewart Island/Rakiura Visitor Levy Policy Subcommittee has the delegated authority and will make decisions to approve applications from the Stewart Island/Rakiura Visitor Levy Fund. The subcommittee will meet annually to review applications and allocate funding. Staff can provide guidance where necessary on allocations and determining the strength of applications in accordance with the policy.
- 15 The subcommittee is the subordinate decision making body of the Stewart Island/Rakiura Community Board. Councillors and the Stewart Island/Rakiura Community Board will be informed of funding decisions via memoranda. Council's Annual Report will contain an itemised statement of the Stewart Island/Rakiura Visitor Levy fund each year.
- 16 Although the subcommittee has complete discretion when allocating funds, the visitor levy policy guides them to allocate funding as per the percentages below:

Table 1

Allocation Category	Funding allocations
Council/Community Owned infrastructure	60-70% of funds available annually
Operational costs	20-25% of funds available annually
Community Projects	5-10% of funds available annually

Table 2

2024/2025 Allocation guideline amounts		
Allocation category	% of budgeted funds (\$296,100)	% of funds held in reserve (\$674,470)
Council / Community Infrastructure (60-70%)	\$177,660 – \$207,270	\$404,682 - \$472,129
Operational Costs (20–25%)	\$59,220 - \$74,025	\$134,894 - \$168,618
Community Projects (5-10%)	\$14,805 - \$29,610	\$33,724 - \$67,447

Table 3

Multi-year funding	
Allocation categories	The number of years the subcommittee can commit to giving funds to an applicant, in future allocation rounds
Council/Community Owned infrastructure	Up to 10 years (the current allocation round, and the next nine allocation rounds). In exceptional circumstances, the subcommittee may consider a longer term of up to 30 years (the current allocation round, and the next 29 allocation rounds).
Operational costs	Up to three years (the current allocation round, and the next two allocation rounds)
Community Projects	One year (just the current allocation round)

Table 4

Requests per allocation category			
	Council & Community Infrastructure (60-70% recommended)	Operational costs (20-25% recommended)	Community projects (5-10% recommended)
Total amount of requests	\$534,929 (includes loan repayment of \$19,929)	\$72,079 (includes 2 nd yr commitment for SIRCET)	\$17,005
% of budgeted funds for 2024/2025 (\$296,100)	180.7%	24.3%	5.7%
% of funds available in reserve for 2024/2025 (\$674,470)	79.3%	10.7%	2.5%

Stewart Island/Rakiura Visitor Levy Subcommittee
10 June 2025

The financial report for the Stewart Island Visitor Levy Fund as of 30 April 2025 is as follows:

Southland District Council Stewart Island/Rakiura Visitor Levy as at 30 April 2025			
2022/23 Year	Summary	Actual to date	Annual Budget
134,281	Opening Balance, 1 July 2024	415,964	-
	<u>Add</u>		
333,103	SI Levy	309,358	315,000
272,173	Fund reserved for prior year commitments	128,835	-
12,472	Interest - Operating Investment	12,950	-
11,845	Interest 2024/25*	-	6,115
763,874	Total Funds	867,107	321,115
	<u>Less</u>		
65,262	Current year commitments	54,617	-
93,573	Prior year commitments (not yet uplifted)	93,573	-
178,600	Prior year grants paid out	35,262	-
10,475	Administration Fee	9,186	18,900
-	Miscellaneous Grant	-	296,100
347,910	Total	192,638	315,000
415,964	Funds Held in Reserves (Available for distribution)	674,470	6,115
Notes:			
* Interest earned on reserves for the period has not been included. The actual amount will not be known until the end of the financial year when the interest allocation across Council's total investments and associated reconciliation of reserves is finalised at the end of the financial year.			

Stewart Island/Rakiura Visitor Levy Subcommittee

10 June 2025

Year Committed	<u>PRIOR YEAR COMMITMENTS</u>	Committed	Uplifted	Balance
2014-2015	Rakiura Heritage Centre Trust	50,000	50,000	-
2016-2017	Rakiura Heritage Trust	400	400	-
2016-2017	Stewart Is. Promotions Assn Inc	850	850	-
2016-2017	Stewart Is. Promotions Assn Inc	3,390	3,390	-
2016-2017	Stewart Is. Promotions Assn Inc	3,700	3,700	-
2016-2017	SIRCET	6,500	6,500	-
2016-2017	Southland District Council	25,600	25,600	-
2016-2017	Southland District Council	8,200	8,200	-
2016-2017	Southland District Council	2,223	2,223	-
2016-2017	Southland District Council	41,000	41,000	-
2016-2017	Stewart Is. Jetties Subcommittee - Ulva Is. Wharf	80,000	80,000	-
2017-2018	Stewart Is. Jetties Subcommittee - Golden Bay Wharf	75,000	75,000	-
2017-2018	Department of Conservation	70,000	70,000	-
2017-2018	Department of Conservation	10,000	10,000	-
2017-2018	Stewart Is. Promotions Assn Inc	1,658	1,658	-
2017-2018	Stewart Is. Promotions Assn Inc	2,849	2,849	-
2017-2018	Stewart Island/Rakiura Community Environment Trust	5,000	5,000	-
2017-2018	Stewart Island/Rakiura Community Environment Trust	5,000	5,000	-
2017-2018	Rakiura Heritage Centre Trust	800	800	-
2017-2018	Rakiura Heritage Centre Trust	22,500	22,500	-
2018-2019	Stewart Is. Promotions Assn Inc	1,766	1,766	-
2018-2019	Stewart Is. Promotions Assn Inc	3,375	3,375	-
2018-2019	SI/Rakiura Community Environment Trust	5,000	5,000	-
2018-2019	S.I./Rakiura Community Board	52,000	52,000	-
2018-2019	S.I./Rakiura Community Board	10,000	10,000	-
2018-2019	S.I./Rakiura Community Board	7,500	7,500	-
2018-2019	S.I./Rakiura Community Board	100,000	100,000	-
2018-2019	S.I./Rakiura Community Board	3,500	3,500	-
2019-2020	Rakiura Heritage Trust	30,000	30,000	-
2019-2020	Stewart Is. Promotions Assn Inc	1,798	1,798	-
2019-2020	S.I./Rakiura Community Board	750	750	-
2019-2020	S.I./Rakiura Community Board	100,000	100,000	-
2019-2020	S.I./Rakiura Community Board	18,000	18,000	-
2019-2020	S.I./Rakiura Community Board	31,206	31,206	-
2020-2021	Stewart Is. Promotions Assn Inc	1,068	1,068	-
2020-2021	Stewart Is. Promotions Assn Inc	1,943	1,943	-
2020-2021	S.I./Rakiura Community Board	(2,770)	(2,770)	-
2021-2022	Rakiura Heritage Trust	20,000	20,000	-
2021-2022	Stewart Island/Rakiura Community Environment Trust	28,600	28,600	-
2021-2022	Stewart Island Health Committee/Future Rakiura	25,000	25,000	-
2021-2022	Stewart Island Lions Club	3,000	3,000	-
2021-2022	S.I./Rakiura Community Board (Golden Bay Geotechnical Survey)	140,000	46,427	93,573
2022-2023	Stewart Island/Rakiura Community Environment Trust	28,600	28,600	-
2022-2023	S.I./Rakiura Community Board (Ulva Island Wharf Rebuild Project)	150,000	150,000	-
2023-2024	Rakiura Heritage Trust	30,000	30,000	-
2023-2024	Stewart Island Promotions	574	574	-
2023-2024	Stewart Island Rakiura Community & Environment Trust	34,688	34,688	-
				-
				-
	Total	1,240,268	1,146,696	93,573

Stewart Island/Rakiura Visitor Levy Subcommittee

10 June 2025

<u>CURRENT YEAR COMMITMENTS</u>		Committed	Uplifted	Balance
Committed in May 2022				
<i>Work on Dundee Footpath completed in 2023/24 repayments to start 2024-25</i>				
2024-2025	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
Committed in June 2024				
2024/25	Stewart Island Rakiura Community & Environment Trust	34,688		
	Total	54,617	-	-
<u>FUTURE YEAR COMMITMENTS</u>				
Committed in May 2022				
<i>Work on Dundee Footpath completed in 2023/24 repayments to start 2024-25</i>				
2025-2026	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2026-2027	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2027-2028	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2028-2029	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2029-2030	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2030-2031	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2031-2032	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2032-2033	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
2033-2034	S.I./Rakiura Community Board (Dundee Footpath Loan Repayments)	19,929		
		179,361	-	-
<u>Refunds/State Cheques/Reversals</u>				
		-	-	-
		-	-	-

Application summary

Applications received	7
Amount requested	\$569,396
Funds budgeted for distribution	\$296,100
Funds committed from previous funding rounds	\$54,617
Funds available for distribution (in reserve)	\$674,470

1. Stewart Island Rakiura Community Board

Requests assistance with costs associated with the Golden Bay walkway project. Installing a walkway here will provide a better experience for visitors and will reduce pedestrian traffic on the road which can be dangerous.

This application is to be considered separately in a public excluded report due to the commercially sensitive information it contains.

2. Stewart Island Rakiura Community Board

Requests assistance with costs associated with installing interpretation panels in four locations on Stewart Island Rakiura.

Total project cost - \$15,000

Amount requested - \$15,000

Eligibility assessment & strength of application	Allocation category	Funds requested as % of budgeted funds (\$296,100)	Previous funding and accountability returned	Documentation requirements met	
Yes, consistent with section 6(b) of the act, request is for activities that are used by and benefit visitors to the island.	Council & community infrastructure	Amount requested is 5.1% of the budgeted funds available and is under the suggested amount of 60-70% for this category	2022 – Golden Bay Geotech Survey (\$140,000) – YES	√ n/a n/a n/a √	Outline of project or work Concept plans Resource or building consent Business plan Legal status of applicant Assessment of how project will benefit visitors or mitigate effects of visitors

Stewart Island/Rakiura Visitor Levy Subcommittee

10 June 2025

3. Stewart Island Promotion Association

Requests assistance with costs associated with employing and events/promotions manager who will be responsible for marketing, planning and promoting events and activities on the island.

Total project cost - \$40,000 (\$20,000 per year for two years)

Amount requested - \$20,000 per year for two years

Eligibility assessment & strength of application	Allocation category	Funds requested as % of budgeted funds (\$296,100)	Previous funding and accountability returned	Documentation requirements met	
Yes, consistent with section 6(b) of the act, request is for activities that are used by and benefit visitors to the island.	Operational costs	Amount requested (\$20,000) is 6.8% of the budgeted funds available and is under the suggested amount of 20-25% for this category	2024 – free wifi project (\$574) – YES 2021 – free wifi project (\$1,068) – YES 2021 – map printing costs (\$1,943) - YES	√ n/a n/a √ √	Outline of project or work Concept plans Resource or building consent Business plan Legal status of applicant Assessment of how project will benefit visitors or mitigate effects of visitors

4. Lord Family Trust

Requests assistance with costs associated with the Millar's Beach restoration project. The project aims to rejuvenate native flora and fauna by the sustained heavy suppression of rats, possums, feral cats and deer in the area.

Total project cost - \$14,200

Amount requested - \$7,582

Eligibility assessment & strength of application	Allocation category	Funds requested as % of budgeted funds (\$296,100)	Previous funding and accountability returned	Documentation requirements met	
Yes, consistent with section 6(b) of the act, request is for activities that are used by and benefit visitors to the island.	Community projects	Amount requested is 2.6% of the budgeted funds available and is under the suggested amount of 5-10% for this category	n/a	√ n/a n/a n/a n/a √	Outline of project or work Concept plans Resource or building consent Business plan Legal status of applicant Assessment of how project will benefit visitors or mitigate effects of visitors

Stewart Island/Rakiura Visitor Levy Subcommittee

10 June 2025

5. Stewart Island Promotion Association

Requests assistance with costs associated with providing free Wi-Fi at the waterfront for visitors. The service is vital as many visitors use it to confirm bookings, make transportation arrangements etc.

Total project cost - \$1,200

Amount requested - \$1,043

Eligibility assessment & strength of application	Allocation category	Funds requested as % of budgeted funds (\$296,100)	Previous funding and accountability returned	Documentation requirements met	
Yes, consistent with section 6(b) of the act, request is for activities that are used by and benefit visitors to the island.	Community projects	Amount requested is 0.4% of the budgeted funds available and is under the suggested amount of 5-10% for this category	2024 – free Wi-Fi project – YES 2021 – free Wi-Fi project – YES 2021 – map printing costs - YES	√ n/a n/a √ √	Outline of project or work Concept plans Resource or building consent Business plan Legal status of applicant Assessment of how project will benefit visitors or mitigate effects of visitors

6. Rakiura Heritage Trust

Requests assistance with operational costs for the museum – specifically wages for the office manager/receptionist and the cleaner.

Total project cost - \$58,800

Amount requested - \$17,391

Eligibility assessment & strength of application	Allocation category	Funds requested as % of budgeted funds (\$296,100)	Previous funding and accountability returned	Documentation requirements met	
Yes, consistent with section 6(b) of the act, request is for activities that are used by and benefit visitors to the island.	Operational costs	Amount requested is 5.8% of the budgeted funds available and is under the suggested amount of 20-25% for this category	2024 – operational costs (\$30,000) – YES 2022 – operational costs (\$20,000) – YES 2020 – operational costs (\$30,000) - YES	√ n/a n/a n/a √ √	Outline of project or work Concept plans Resource or building consent Business plan Legal status of applicant Assessment of how project will benefit visitors or mitigate effects of visitors

7. Future Rakiura

Requests assistance with costs associated with a research and education project aimed at understanding the interactions and impacts between humans and NZ sea lions in Patterson's Inlet. Dr Louise Chilvers from Massey University is intending to conduct the research over two summers. Future Rakiura are supporting the project and acting as the applicant organisation.

Total project cost - \$48,380

Amount requested - \$8,380

Eligibility assessment & strength of application	Allocation category	Funds requested as % of budgeted funds (\$296,100)	Previous funding and accountability returned	Documentation requirements met	
Yes, consistent with section 6(b) of the act, request is for activities that are used by and benefit visitors to the island and also to mitigate the adverse effects on the environment.	Community Project	Amount requested is 2.8% of the budgeted funds available and is under the suggested amount of 5-10% for this category	2022 – helipad project (\$25,000) - YES	√ n/a n/a n/a √ √	Outline of project or work Concept plans Resource or building consent Business plan Legal status of applicant Assessment of how project will benefit visitors or mitigate effects of visitors

Issues

- 17 Applications to the fund are oversubscribed against budgeted funding for 2024/2025. The subcommittee will need to decide if they want to allocate funding over the budgeted amount for the 2024/25 financial year. Distributing all funding applications over this amount will significantly deplete the reserves which to restore will take a number of years, and limit funding allocations available to future projects.
- 18 As indicated in the tables underneath paragraph 16, the policy sets guidelines for distribution for each allocation category but these are a guide only, the subcommittee may allocate outside these guidelines and over the budgeted amount if they wish to do so. Multi-year funding is an option for allocation (not for community projects) and the policy information for this is detailed in table 3. These are set rules under the policy.

Factors to consider

Legal and statutory requirements

- 19 Together the Southland District Council (Stewart Island/Rakiura Visitor Levy) Empowering Act 2012, Stewart Island/Rakiura Visitor Levy Bylaw and Stewart Island/Rakiura Visitor Levy Policy set the legal framework for the collection and application of visitor levy funding.
- 20 The information and recommendations in this report are provided to meet the requirements set out within this legal framework for how the fund is to be allocated. Applications have been assessed as eligible and categorised under each allocation category. Information has been provided in the report about required documentation supplied by each applicant and previous funding received and accountability returned.

Community views

- 21 The Stewart Island/Rakiura Visitor Levy Policy Subcommittee has appointed representatives to represent the views of the Stewart Island/Rakiura community. It is generally accepted that infrastructure applications from Stewart Island Rakiura Community Board have community support as they are listed in Southland District Council's Long-Term Plan and have been through this consultation process.

Costs and funding

- 22 There is currently \$674,470 held in the Stewart Island/Rakiura Visitor Levy reserves, and \$296,100 budgeted to spend in the 2024/2025 financial year.
- 23 Requests for this funding round total \$569,396 for this financial year, and there is \$54,617 already committed from a multi-year request in the last funding round (\$34,688), and a loan repayment (\$19,929). One application is a multi-year request of \$20,000 per year for two years.
- 24 The subcommittee may allocate funding over the budgeted amount if they wish to do so.
- 25 Any amount allocated over the 2024/2025 budget of \$296,100 will require an unbudgeted expenditure report to Council.

Policy implications

- 26 Information in this report aligns with the Stewart Island/Rakiura Visitor Levy Policy requirements for assessing applications and allocating funding.
- 27 Each application is individually assessed against requirements to provide supporting information, whether the application meets the eligibility criteria under the Empowering Act and which category the application falls under.
- 28 In its decisions to allocate funding under this report the Subcommittee must consider allocating funding towards applications within the proportional guidelines set out within the Policy and based on the strength of the application. To achieve this, the report identifies the extent to which applications align to these proportions and staff are available to provide guidance to the Subcommittee as necessary whilst it deliberates.
- 29 To help ensure funding is applied in accordance with applications allocated, Policy requires all applicants to provide information on accountability by 31 May in the year following allocation, future applications are not eligible where this accountability information is not provided.

Analysis

Options considered

- 30 The options considered are to either approve the applications, decline the applications or pay a proportion of the requested funds.

Analysis of options

Option 1 – approve the funding applications in full or part

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none"> · fulfils the purpose of the Stewart Island/Rakiura Visitor Levy pursuant to the Southland District Council (Stewart Island/Rakiura Visitor Levy) Empowering Act 2012 · eligible groups and organisations would be positioned to deliver their proposed projects and initiatives. 	<ul style="list-style-type: none"> · less money will be retained in the Stewart Island/Rakiura Visitor Levy Fund.

Option 2 – decline part of or the full application

<i>Advantages</i>	<i>Disadvantages</i>
<ul style="list-style-type: none"> · there will be more money retained in the Stewart Island/Rakiura Visitor Levy Fund. 	<ul style="list-style-type: none"> · the purpose of the Stewart Island/Rakiura Visitor Levy pursuant to the Southland District Council (Stewart Island/Rakiura Visitor Levy) Empowering Act 2012 may not be fulfilled · eligible groups and organisations may not secure the required funding to deliver their proposed projects and initiatives.

Assessment of significance

- 31 Staff consider the decisions in this report to allocate Visitor Levy funds to applicants should be identified as having low to moderate importance, which would not be considered significant under Council's Significance and Engagement Policy.
- 32 The decisions are considered to have some positive impacts on community outcomes, align with Council policies and previous decisions, impacts a small number of people positively in a moderate way, costs are more substantial but come within budgeted expenditure, and have some limited public interest concentrated around the Stewart Island/Rakiura community.
- 33 The appropriate approach for these decisions under policy is to keep the community informed through the decision process and once a decision is made, rather than consult.

Recommended option

- 34 The recommended option is "option 1 – approves the funding applications in full or part".

Next steps

- 35 Advise applicants the outcome of their application and arrange payment of the grants awarded.

Attachments

- A FINAL Stewart Island Rakiura Visitor Levy Policy PDF - adopted 17 May 2023 - amended on 13 December 2023
- B FINAL Stewart Island Rakiura Visitor Levy Bylaw (Revision 2, 2022) - adopted 22 June 2022



Stewart Island/Rakiura Visitor Levy Policy

Group responsible: Democracy and community

Date approved: 12 December 2012

Date amended: 13 December 2023

File number: R/23/12/57676

1.0 Purpose

This policy provides guidance on governance and administration of the Stewart Island/Rakiura visitor levy. The policy outlines who is liable to pay levies and revenue and how levies and revenue will be collected, administered, allocated and enforced.

2.0 Background

Although Stewart Island/Rakiura has a small resident population, it is a destination for a large number of short-term visitors. This creates a unique funding challenge for Council.

The Southland District Council (Stewart Island/Rakiura Visitor Levy) Empowering Act 2012 (the act) was passed into law on 26 March 2012. The act empowers Council to set and collect levies and obtain revenue from visitors to Stewart Island/Rakiura. Under the act, funds must be used to better provide services, facilities, amenities for island visitors, or mitigate environmental effects.

3.0 Definitions

ACCOUNTABILITY FORM	This is a form that must be completed by applicants after they have received funding, so Council is informed how the applicant has spent the funds and so Council is aware of any benefits that have been achieved with the funds
ACTIVITY	Has the meaning given in s.5(1) of the Local Government Act 2002: A good or service provided by, or on behalf of, a local authority or a council-controlled organisation; and includes— (a) the provision of facilities and amenities; and (b) the making of grants; and (c) the performance of regulatory and other governmental functions

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APPROVED OPERATOR	<p>A person who owns or operates or is otherwise in control of a transport vessel and who enters into a contract with the Council—</p> <ul style="list-style-type: none"> (a) relating to the provision of a service to carry to or from the island passengers who, but for the contract, would be visitors to the island; and (b) providing for revenue to be collected from the passengers; and (c) that has the effect of bringing passengers carried by the operator within the definition of an excluded visitor; and (d) including any other terms and conditions that may be agreed from time to time by the approved operator and the Council <p>The Approved Operators are RealNZ Limited (currently trading as Stewart Island Experience), Stewart Island Flights Limited and ISS McKay Limited on behalf of the cruise ships</p>
A STAFF MEMBER	A staff member from Council
BYLAW	Means the Stewart Island/Rakiura Visitor Levy Bylaw
CONTRACTOR	A contractor approved by Council
COUNCIL	Southland District Council
DEPENDENT	A person primarily under the care and responsibility of another person, living with that person as a member of their family and substantially reliant on that person for financial support
EXCLUDED VISITOR	<p>A person who is not to be treated as a visitor because the person—</p> <ul style="list-style-type: none"> (a) travels to the island under a contract of carriage with an Approved Operator; or (b) is the owner or is otherwise in control of a transport vessel or is employed, or under contract, to work on a transport vessel; or (c) is one whose visit is entirely within the boundaries of the Rakiura National Park; or (d) is visiting the island for a continuous period of 21 days or more; or (e) is a person under the age of 18 years on the date of arrival on the island
FREEDOM TRAVELLER	A visitor who travels to the island by means other than as a passenger of an Approved Operator. This includes chartered vessels and independent travel. It does not include people who travel via the ferry (with RealNZ Limited), scheduled flights (Stewart Island Flights) or cruise ships
GST	Goods and services tax chargeable under the Goods and Services Act 1985



ISLAND	Stewart Island/Rakiura
LEVY	The sum of money (inclusive of GST) collected under the Stewart Island/Rakiura Visitor Levy Bylaw from persons who are visitors to the island
MĀORI LAND	Has the meaning given in s.4 of the Te Ture Whenua Māori Act 1993: Māori customary land and Māori freehold land
RAKIURA MAORI LANDS TRUST	The Rakiura Māori Lands Trust is governed by seven trustees appointed by the Māori Land Court upon recommendation from the beneficial owners. The Rakiura Māori Lands Trust holds lands and funds in trust for many Rakiura Māori descendants
RATEPAYER	A person who is named on a current rates notice of a rating unit on the island. Only persons who are named on current rates notices are considered to be ratepayers, regardless of who funds rates payments
RESIDENT	A person recognised as living on the island for electoral residency purposes under s.23 of the Local Electoral Act 2001
REVENUE	Revenue (inclusive of GST) collected from excluded visitors, in place of any levy imposed by the Stewart Island/Rakiura Visitor Levy Bylaw, by an Approved Operator in accordance with a contract entered into for the purpose with Council
SUBCOMMITTEE	The Stewart Island/Rakiura Visitor Levy Allocation Subcommittee
TENANT	A person who has a tenancy agreement for a rating unit on the island under the provisions of the Residential Tenancies Act 1986
THE ACT	The Southland District Council (Stewart Island/Rakiura Visitor Levy) Empowering Act 2012
TRANSPORT VESSEL	(a) means a ship, aircraft, or other vessel carrying passengers to or from the island, whether or not— (i) there is a charge for any or all of those passengers; or (ii) any charge is part of a tourist package; or (iii) the vessel is operated commercially; or (iv) the vessel is used for freight as well as passengers; and (b) includes— (i) a regular ferry or air service to the island; and (ii) a cruise ship whose passengers disembark to land on the island
VISITOR	Any person who—



	<p>(a) travels to or from the island, whether for a single day or for any continuous period of less than 21 days, by any transport vessel; but</p> <p>(b) is not a person who,—</p> <p>(i) for the purposes of the Local Government (Rating) Act 2002, is a ratepayer in respect of a rating unit on the island; or</p> <p>(ii) is a resident of the island by virtue of being a resident for electoral residency purposes under s.23 of the Local Electoral Act 2001; or</p> <p>(iii) is a tenant of a rating unit for the purposes of the Residential Tenancies Act 1986; or</p> <p>(iv) is the spouse, civil union partner, de facto partner, or dependent of a ratepayer or tenant; or</p> <p>(v) is a beneficiary of the Rakiura Māori Land Trust or who has an ownership interest in a Māori land block on the island; or</p> <p>(vi) is an excluded visitor.</p>
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4.0 Collection

The act provides for the collection of money from two sources:

1. **revenue;** and
2. **levy.**

The definitions of revenue and levy are found in section '3.0 Definitions' above. Council will set the revenue and levy at the same amount.

Through contractual arrangements, Council will collect revenue from passengers who travel with Approved Operators. Approved Operators include RealNZ Limited (currently trading as Stewart Island Experience), Stewart Island Flights Limited and ISS McKay Limited on behalf of the cruise ships. Passengers will pay the Approved Operator in accordance with the terms of carriage (i.e. the revenue will form part of their ticket price). If the passenger travels via an Approved Operator and pays a local or child fare, the Approved Operator will not charge the revenue.

Under the bylaw, Council will collect the levy. The levy will be collected from freedom travellers (i.e. those who are visitors under the act, so it does not include people who travel with an Approved Operator). Where a person is a freedom traveller the categories of exemption outlined in Clause 4.1 below apply. This means that if a freedom traveller is not exempt, he or she will have to pay the levy.

4.1 Who pays

All individuals travelling to Stewart Island/Rakiura, including freedom travellers, must pay the levy or pay revenue to an Approved Operator unless they are exempt under the following:



- residents, ratepayers and tenants of Stewart Island/Rakiura and their spouses, civil union partners, de facto partners, or dependents;
- beneficiaries of the Rakiura Māori Land Trust or individuals who have an ownership interest in a Māori land block on the island;
- visitors who remain on the island for any continuous period of 21 days or more;
- owners of a transport vessel or individuals employed under contract to work on a transport vessel;
- individuals whose visit is entirely within the boundaries of the Rakiura National Park; or
- persons under the age of 18 years on the date of arrival on the island.

Where the resident or ratepayer exemption applies to a person, the exemption does not automatically apply to the whole family or group. The exemption applies to the ratepayer(s) set out on the rates notice and their spouse, civil union partner, de facto partner and dependents. This does not include visiting adult children or grandchildren (unless they are dependents).

Holiday home owners are exempt if they are a ratepayer on the Council's rates notice. However, beneficiaries of family trusts will not be exempt unless they are designated by name as ratepayers on Council rates notice, or they meet one of the other reasons for exemption outlined above.

The exemption does not apply to visiting trades-people unless the person stays for more than 21 consecutive days. Visitors undertaking volunteer work are also required to pay the levy unless they fall within a category of exemption.

Visiting entirely within the boundaries of the Rakiura National Park means the person visiting does not arrive or leave through the township of Oban.

5.0 Calculation

The amount of the levy is set out in the bylaw and is \$5.00 before 1 October 2023, \$10.00 on or after 1 October 2023, and \$15.00 on or after 1 October 2025. The revenue is set at the same amount.

If Council decides to increase the levy amount, Approved Operators will receive 15 months lead in time before they start collecting the new amount and the increase will not take effect until 1 October in the year following the decision to adopt a new or amended bylaw and policy.

5.1 Arrangements with Approved Operators

Approved Operators will collect revenue on behalf of Council in accordance with contractual arrangements. The contractual arrangements will be negotiated for each Approved Operator taking into account the individual circumstances of each transport business.

Apart from ISS McKay Limited, Approved Operators will collect revenue from passengers on both inbound and outbound journeys (half the revenue amount each way). This allows for passengers who use different modes of transport to travel to and from the island and allows the revenue to be apportioned across the modes of transport on an equitable basis.

ISS McKay Limited will collect the revenue amount from each passenger (carried to or from Stewart Island/Rakiura (or its internal waters) on behalf of Southland District Council. This applies regardless of



whether or not that passenger disembarks and regardless of the number of times the passenger disembarks and embarks.

5.2 Collection of the levy from freedom travellers

The bylaw outlines levy collection from visitors who travel to the island via private or chartered transportation (i.e. freedom travellers). The levy is payable when the visitor arrives on the island. Council has provided a collection box to receive payments or payment can be made at any Council office. The collection box is placed on the Main Wharf in Oban. Freedom travellers can deposit levy payments at this location at any time. Council may also enter into agreements with agents operating chartered vessels, to collect the levy from passengers on behalf of Council.

Only one payment is required per person for the duration of their stay on the island. Travel to neighbouring islands (excluding the mainland) will not constitute leaving the island.

6.0 Proof of exemption

Persons who are not required to pay the visitor levy or revenue can apply for a Southland District Council photo identification card. Southland District Council photo identification cards will be accepted as proof of exemption by Approved Operators and agents. They will also be accepted by enforcement officers monitoring compliance with the bylaw.

A Southland District Council photo identification card will be issued and renewed at no cost to the applicant. Renewing a Southland District Council photo identification card will require confirmation of entitlement using documentation as set out in Appendix A. Photographs will also be updated at the time of renewal. It is the responsibility of the card holder to advise the Council of any change in contact details or exemption status.

The card remains the property of Southland District Council. Cards are not transferable and cardholders retain sole responsibility for use of the card issued to them. A replacement fee will apply to lost or damaged cards. This fee will be set out in the Southland District Council Schedule of Fees and Charges.

Agreements between Council and Approved Operators with respect to exemption identification are reached on an individual basis and may differ. A Southland District Council photo identification card may be required by the Approved Operator at the time of ticket purchase or boarding the vessel for an exemption to be granted.

Each Approved Operator may choose to compile a list of names eligible for local fares. Eligibility for a local fare is a commercial decision made at the discretion of Approved Operators and is not influenced or administered by Council. Individuals can contact Approved Operators to ascertain whether they maintain such a list and to determine their eligibility for inclusion. Eligibility for local fares may mean that there is no requirement to apply for and carry a photo identification card when travelling.

6.1 Application for exemption

An application to receive a Southland District Council photo identification card can be made by downloading the form from Council's website, attending the Southland District Council office located at



15 Forth Street, Invercargill and by sending a completed application form to Council (PO Box 903, Invercargill 9840 or contacts@southlanddc.govt.nz) with a colour passport photo of each applicant.

Applicants are also required to provide documentation which proves their exemption. Examples of accepted documentation to prove exemption status are set out in Appendix A.

7.0 Refunds

People who have been charged the levy but believe that they are exempt under the act can apply to Council to receive a refund.

Refund applications should state the reason for the claim, along with a copy of supporting documentation as set out in Appendix A.

An application for a refund must be made within six months of the date of travel.

8.0 Audit

Council has the ability to audit the collection and payment of the levy by agents and revenue by Approved Operators. Audit procedures may include a review of visitor numbers against funds received.

9.0 Enforcement

Part 2 of the act outlines infringement offences. Any person who evades the payment of a levy payable by that person or falsely claims that he or she is not a visitor commits an infringement offence.

An infringement fee has been set by way of regulation and will be displayed on signs erected on the island. The amount of the infringement fee is \$250. Infringement notices can be issued by Southland District Council Enforcement officers if they observe a person committing an infringement offence or if they have reasonable cause to believe that a person has committed an infringement offence.

Council will use the following to identify who is exempt from paying the levy: Southland District Council photo identification cards, a ticket issued by an approved transport operator, and a cruise ship boarding pass. A receipt from the collection box or a levy collection agent will be accepted as proof of payment of the levy.

10.0 Administration

The subcommittee has the delegated authority and is accountable to Council to make decisions regarding funding applications to the Stewart Island/Rakiura visitor levy fund, in accordance with the Act. The subcommittee will meet annually to review applications and allocate funding. It may only allocate funding once a year.

The subcommittee is a subordinate decision-making body of the Stewart Island/Rakiura Community Board. The subcommittee is subject to standard audit procedures. Councillors and the Stewart Island/Rakiura Community Board will be informed of funding decisions via memoranda. Council's



Annual Report will contain an itemised statement of the Stewart Island/Rakiura Visitor Levy fund each year.

10.1 Subcommittee membership

The subcommittee will consist of the following members appointed by Council:

- a chairperson, who will be stipulated in Council's Delegations Manual
- the chair of the Finance and Assurance Committee
- the councillor for Stewart Island/Rakiura
- a representative from the Stewart Island/Rakiura Community Board
- a representative recommended by each of the Approved Operators (three in total)
- a member to represent iwi
- a member from Stewart Island/Rakiura

The chair of the subcommittee will have a casting vote, which can only be exercised to resolve an evenly split vote.

If the councillor for Stewart Island/Rakiura is also the chair of the Finance and Assurance Committee, then an additional councillor will be appointed to the subcommittee, by Council.

Elected members on the subcommittee must act in accordance with Council's Code of Conduct. Council's Standing Orders also apply to the subcommittee. If a subcommittee member has any connection to an application greater than that of the general public, that member should declare an interest in the relevant application, prior to it being considered. In such circumstances, the member affected shall still be entitled to speaking and voting rights, unless the member has a pecuniary interest in the application.

Further information on the appointment of the representatives from the Approved Operators, the iwi representative and the representative from Stewart Island/Rakiura, is provided in Appendix B.

10.2 Applications

The application process will be administered by Council. Advertisements will be placed at the beginning of April seeking applications and outlining the deadline for receipt of applications. The application period will close on the second Friday of May each year.

Applications to the Stewart Island/Rakiura visitor levy fund must be made using the appropriate documentation provided by Council. All applications must include:

- an outline of the project or work requiring funding, including a timeline;
- if the project involves physical works, scale conceptual plans including site plans;
- any requirement for resource or building consent;
- a business plan for the project including costs and on-going funding requirements, if any;
- evidence of legal status of the applicant (eg, charitable trust or body corporate);
- an assessment of how the project is for the benefit of visitors; and
- declarations of interest.

An application can be made for funding in relation to salary and wages and it can relate to a range of things such as the development or maintenance of existing facilities, services and projects.



Applicants can indicate on their application form if they would like to be heard by the subcommittee.

Late applications will not be considered.

10.3 Allocation process

A three step process will be undertaken to allocate funds. The three steps are:

Step 1 - assessing if the application is eligible for funding

Step 2 - assessing which category the application falls under

Step 3 - allocating funds to applications from each category (using the funding allocation percentages as a guide and based on the strength of the application).

Step 1: Assessing if the application is eligible for funding

To be considered for funding, applications must be consistent with s.6(b) of the act. Section 6(b) states that revenue and levies collected must be used to:

- fund, wholly or in part, activities used by visitors or any class of excluded visitor;
- fund, wholly or in part, activities on the island for the benefit of visitors or any class of excluded visitor; and/or
- mitigate the adverse effects of visitors or excluded visitors on the environment of the island.

If an application is not consistent with s.6(b) of the act, this will be identified by a staff member or contractor.

Where appropriate, a staff member or contractor may liaise with an applicant to discuss their application (e.g. whether further information is needed, or whether there is a minor issue with the application etc). The applicant will be permitted to make minor amendments to their application in this circumstance.

If, after engaging with the applicant, the staff member or contractor thinks the application is still not eligible for funding, the staff member or contractor will communicate this to the subcommittee at the allocation meeting.

Step 2: Assessing which category the application falls under

Applications that are consistent with s.6(b) of the act will be assessed by a staff member or contractor as being in one of the following categories.

Allocation Category	Description
COUNCIL/COMMUNITY OWNED INFRASTRUCTURE	Applications relating to Council's/the community's physical and organisational structures and facilities (e.g. buildings, jetties, tracks, power supply, WiFi installation, signage).
OPERATIONAL COSTS	Applications by non-profit organisations to meet their operational needs/requirements. (e.g. printing of maps, visitor experience host, museum operational costs, provision of WiFi service)



COMMUNITY PROJECTS	Applications that do not relate to infrastructure. These applications must be made by Stewart Island/Rakiura resident/s, ratepayer/s or tenant/s. e.g. habitat restoration, picnic tables
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A staff member or contractor will communicate to the subcommittee, which category they believe the application falls under. It is possible that an application will fit into more than one category.

Step 3 - Allocating funds in accordance with the funding allocation percentages and based on the strength of the application

Funding allocation categories and percentages

The subcommittee will consider the allocation categories when it allocates funding. Although it has complete discretion, as a guide, the subcommittee may allocate the funding received on an annual basis, to applications in each category in accordance with the funding allocation percentages outlined below.

Allocation Category	Funding Allocations
COUNCIL/COMMUNITY OWNED INFRASTRUCTURE	60-70% (% of the funds available annually that will be allocated to Council/community owned infrastructure)
OPERATIONAL COSTS	20-25% (% of the funds available annually that will be allocated to operational costs)
COMMUNITY PROJECTS	5-10% (% of the funds available annually that will be allocated to community projects)

The strength of the application

The subcommittee will allocate funds to applications in the allocation categories based on the strength of the application. The strength of an application will be determined by the extent it will:

- fund, wholly or in part, activities used by visitors or any class of excluded visitor; or
- fund, wholly or in part, activities on the island for the benefit of visitors or any class of excluded visitor; or
- mitigate the adverse effects of visitors or excluded visitors on the environment of the island.

For applications made by Council (including the Stewart Island/Rakiura community board), the inclusion of a project in Council's Long Term Plan indicates that it has gone through a community engagement process, and Council has endorsed the project as supporting the community's long term objectives.

The subcommittee will have regard to the extent to which the proposed project will also benefit the local community.

A staff member or contractor will provide guidance to the subcommittee, on the strength of an application.

Committing to allocating funds in the future

The subcommittee can commit to multi-year funding (committing to give funds in an application round, to an applicant in future allocation rounds). This could be done by the subcommittee to commit to service



loans drawn, such as to cover capital works projects. When this can occur, and for how many years, relates to the allocation category of the application, and is outlined in the table below.

Allocation categories	The number of years the subcommittee can commit to giving funds to an applicant, in future allocation rounds
COUNCIL/COMMUNITY OWNED INFRASTRUCTURE	up to 10 years (the current allocation round, and the next nine allocation rounds). In exceptional circumstances, the subcommittee may consider a longer term of up to 30 years (the current allocation round, and the next 29 allocation rounds).
OPERATIONAL COSTS	up to three years (the current allocation round, and the next two allocation rounds)
COMMUNITY PROJECTS	one year (just the current allocation round)

Allocations in each funding year will include those funds committed from prior years.

The subcommittee will work with staff to develop a 10 Year Funding Plan as part of each three year Long Term Plan cycle. This plan would then be approved by Council through the Long Term Plan. The plan could be used to provide forecasting around future revenue streams and also to enable the subcommittee to have a view on what proportions it might want to allocate towards multi-year commitments.

General points about allocation

Local and central government can make applications for funding.

Funding can be allocated to an applicant when he/she has received funding for the same or a similar thing, on a previous occasion.

Applicants are not required to have spent the funding that has been allocated to them previously, in order to be eligible for further funding.

The subcommittee can elect to allocate a lower level of funding to an applicant, but it cannot allocate more than what the applicant has requested.

When an application is considered by the subcommittee, the applicant will be notified within two weeks of the subcommittee meeting whether or not their application was successful, and if it was successful, the amount of funding allocated.

The subcommittee will not give further funding to applicants if they have not returned their accountability form to Council (when they have been required by this policy, to do so).

11.0 Accountability

Applicants will be required to complete and provide Council with accountability forms. Accountability forms must be returned to Council before 31 May, the year after the subcommittee grants the applicant funds. If an applicant hasn't used all (or any) of the funds by that time, the accountability form must still be completed. An applicant also must complete the accountability form by 31 May each subsequent year



(even if the applicant outlines that no funding has been spent), until all of the funding allocated has been accounted for by way of an accountability form and/or returned to Council and the fund.

Any funds that are not spent by applicants (completing what was outlined in their application), within five years of the decision to allocate the applicant funding, must be returned to Council and the fund.

If any funding is returned, information on the amount and why the funding was returned, will be communicated to the subcommittee at the annual allocation meeting.

12.0 Review

The review period of the bylaw and this policy is six years.

Council may review the bylaw and this policy at any time, if required, within six years of the last review.



Appendix A: Documents which can be used to claim exemption or refund

The table below contains a list of documents which will be accepted as proof of exemption from the need to pay the Stewart Island/Rakiura Levy.

These documents will be accepted in relation to (1) applying for a photo identification card and (2) applying for a refund.

Original documentation from both Category A and Category B must be presented concurrently. Council requires proof of both identity and levy exemption status. A current address will need to be provided to receive notice of renewals and other information.

This is not a comprehensive list and other equivalent documents may be accepted when applying for a Southland District Council photo identification card or applying for levy refund.

AT LEAST ONE PHOTO ID MUST BE PRODUCED FROM CATEGORY A (THE NAME ON THE DOCUMENT MUST BE EXACTLY THE SAME AS THE APPLICANTS NAME)	
passport (passports can be accepted up to two years past the expiry date)	
proof of age card with photo	
drivers licence	
public service employee ID card bearing photo	
education ID card bearing photo	
firearms licence	
AT LEAST ONE FORM OF IDENTIFICATION FROM CATEGORY B	
REASON FOR EXEMPTION	EXAMPLE OF ACCEPTED PROOF OF EXEMPTION
<ul style="list-style-type: none"> • ratepayers • tenants • residents 	<p>One or more of the following documents showing name and address on Stewart Island/Rakiura:</p> <ul style="list-style-type: none"> • notice of rates or VG number verified by Rates Department. Rates notices must state that the applicant is the owner of the property to which the rates notice was sent and the document must be current at the time of the application • tenancy agreement • utilities bill • insurance renewal advice • motor vehicle registration • electoral roll number • mortgage documents • current land titles office records
<ul style="list-style-type: none"> • spouses of a ratepayer or tenant • civil union or de facto partner of a ratepayer or tenant • dependents of a ratepayer or tenant 	<ul style="list-style-type: none"> • application to be made in conjunction with the respective person



<ul style="list-style-type: none"> • Rakiura Māori Land Trust beneficiaries. 	<ul style="list-style-type: none"> • Council may be able to check property rights via the www.maorilandonline.govt.nz website or work with the Rakiura Māori Land Trust to access its database of beneficiaries
<ul style="list-style-type: none"> • people under the age of 18 	<ul style="list-style-type: none"> • passport • school student concession card • birth certificate
<ul style="list-style-type: none"> • owners or those working on transport vessels 	<ul style="list-style-type: none"> • employment documentation (eg, payslips, letter from employer)
<ul style="list-style-type: none"> • visitors whose visit is for 21 days or more 	<ul style="list-style-type: none"> • tickets or invoices showing names and dates of arrival and departure • receipts for accommodation covering the relevant time period



Appendix B: Appointing representatives to the subcommittee

Representative recommended by each of the Approved Operators

Council will request the Approved Operators to nominate a person to be a voluntary member on the subcommittee.

Representative for iwi

Council will, in accordance with its Charter of Understanding with Te Ao Mārama Incorporated, seek an iwi representative to be a voluntary member on the subcommittee. If a willing iwi representative is not identified through liaising with Te Ao Mārama Incorporated, Council will then approach other people who may be suitable for the role.

The appointment of a member to represent iwi will be reviewed every three years, after Council elections.

Representative from Stewart Island/Rakiura

Council will request expressions of interest from Stewart Island/Rakiura residents and ratepayers, to be a voluntary member on the subcommittee. A person will be selected by Council, following consideration of:

- the skills and experience of those interested
- the extent that conflicts of interest would be likely if the individual became a member (there is a preference for minimal/no conflicts being likely)
- the extent that the individual knows tourist/visitor requirements and impacts on the island.

If no-one suitable expresses interest, Council will approach people who may be suitable for the role.

The appointment of the Stewart Island/Rakiura representative will be reviewed every three years, after Council elections.



Southland District Council

Stewart Island/Rakiura Visitor Levy Bylaw

Revision 2, 2022

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Southland District Council

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Document Revision

Date	Amendments	Amended by	Approved by	Approval date
2012	Original		Council	12 Dec 2012
2019	2019 review <ul style="list-style-type: none"> • adding/amending definitions of 'Approved Operator' and 'Visitor' • adding the location of the collection box • adding the infringement fee that has been set by way of regulation • removing that payment can be made on website. 	Council	Council	7 February 2019 – to come into effect on 1 July 2019
2022	2022 review <ul style="list-style-type: none"> • amending levy quantum 	Council	Council	22 June 2022

Southland District Council

1 Title and commencement

This bylaw may be cited as the Southland District Council Stewart Island/Rakiura Visitor Levy Bylaw.

This bylaw shall come into force on 1 October 2013.

2 Purpose of bylaw

The bylaw is made to prescribe:

- (a) the rate of the levy that will be imposed on or in respect of visitors; and
- (b) the means by which the levy is to be collected.

This bylaw does not apply to a person who travels to or from Stewart Island/Rakiura under a contract of carriage with an 'Approved Operator' or who is otherwise excluded from the definition of 'visitor'. As at the date of this bylaw the Approved Operators are Real NZ Limited (currently trading as Stewart Island Experience), Stewart Island Flights Limited, and ISS McKay Limited (as agent for the cruise ship operators).

3 Interpretation

In this bylaw, unless the context requires otherwise:

Act	means the Southland District Council (Stewart Island/Rakiura Visitor Levy) Empowering Act 2012
Approved Operator	means a person who owns or operates or is otherwise in control of a transport vessel and who enters into a contract with the Council: <ul style="list-style-type: none"> (a) relating to the provision of a service to carry to or from the Island passengers who, but for the contract, would be visitors to the Island; and (b) providing for revenue to be collected from the passengers; and (c) that has the effect of bringing passengers carried by the operator within the definition of an excluded visitor; and (d) including any other terms and conditions that may be agreed from time to time by the approved operator and the Council
Council	means the Southland District Council
GST	means goods and services tax chargeable under the Goods and Services Act 1985
Levy	means the levy set under clause 4 of this bylaw
Visitor	means any person who: <ul style="list-style-type: none"> (a) travels to or from the Island, whether for a single day or for any continuous period of less than 21 days, by any transport vessel; but (b) is not a person who: <ul style="list-style-type: none"> (i) for the purposes of the Local Government (Rating) Act 2002, is a ratepayer in respect of a rating unit on the Island; or (ii) is a resident of the Island by virtue of being a resident for electoral residency purposes under s.23 of the Local Electoral Act 2001; or

Southland District Council

	<p>(iii) is a tenant of a rating unit for the purposes of the Residential Tenancies Act 1986; or</p> <p>(iv) is the spouse, civil union partner, de facto partner, or dependent of a ratepayer or tenant; or</p> <p>(v) is a beneficiary of the Rakiura Māori Land Trust or who has an ownership interest in a Māori land block on the Island; or</p> <p>(vi) is an excluded visitor.</p> <p>For the avoidance of doubt, as at the date of this bylaw, 'visitor' excludes a person who travels to or from Stewart Island/Rakiura under a contract of carriage with an Approved Operator or who is otherwise excluded from the definition of 'visitor'.</p>
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4 Levy for visitors to Stewart Island/Rakiura

The levy for a visitor who travels to Stewart Island/Rakiura is:

- (a) \$5.00 (inclusive of GST) before 1 October 2023; and
- (b) \$10.00 (inclusive of GST) on and after 1 October 2023; and
- (c) \$15.00 (inclusive of GST) on and after 1 October 2025.

5 Surrounding islands

For the avoidance of doubt, a visitor who has paid a levy for travel to Stewart Island/Rakiura is not required to pay an additional levy for return travel from Stewart Island/Rakiura to a surrounding island.

6 Means of collection of levies

Levies will be collected:

- (a) by Council at any of its offices;
- (b) by Council at its collection box on the Main Wharf in Oban; and
- (c) by agents of the Council appointed to collect levies on its behalf.

Details of the agents who have been appointed to collect levies will be given on the signs erected by the Council at major points of entry on Stewart Island/Rakiura under s.5(3) of the Act and on Council's website.

7 Offences and penalties

A person commits an infringement offence under the act who:

- (a) evades the payment of a levy payable by that person; or
- (b) falsely claims that he or she is not a visitor.

The infringement fee for each infringement offence has been set by way of a regulation made under the Act and it is \$250.

Southland District Council
This bylaw has been made and confirmed by a resolution passed at a meeting of Council held on
Wednesday 12 December 2012.

THE COMMON SEAL of the }
SOUTHLAND DISTRICT COUNCIL }
was hereunto affixed in the presence of: }

_____ MAYOR

_____ CHIEF EXECUTIVE

Exclusion of the public: Local Government Official Information and Meetings Act 1987

Recommendation

That the public be excluded from the following part(s) of the proceedings of this meeting.

C8.1 Stewart Island Visitor Levy funding allocations May 2025 funding round - application from Stewart Island/Rakiura community board - Golden Bay Walkway project

The general subject of each matter to be considered while the public is excluded, the reason for passing this resolution in relation to each matter, and the specific grounds under section 48(1) of the Local Government Official Information and Meetings Act 1987 for the passing of this resolution are as follows:

General subject of each matter to be considered	Reason for passing this resolution in relation to each matter	Ground(s) under section 48(1) for the passing of this resolution
Stewart Island Visitor Levy funding allocations May 2025 funding round - application from Stewart Island/Rakiura community board - Golden Bay Walkway project	s7(2)(i) - the withholding of the information is necessary to enable the local authority to carry on, without prejudice or disadvantage, negotiations (including commercial and industrial negotiations).	That the public conduct of the whole or the relevant part of the proceedings of the meeting would be likely to result in the disclosure of information for which good reason for withholding exists.