



# Agenda

## Stewart Island/Rakiura Visitor Levy Subcommittee

Thursday, 4 June 2026, 9:45am

Stewart Island Pavilion, 7 Ayr Street, Oban, Stewart Island



Chairperson  
Deputy chairperson  
Members

Christine Menzies - Councillor

Lyndon Cleaver - ISS-McKay

Aaron Conner - Community Board

Bruce Ford – Community rep.

Emma McDonald – Community rep.

Bill Moffatt - South East Air

Paul Norris – Real NZ

Iwi representative

Bruce Robertson – Finance and  
Assurance

Jon Spraggon - Councillor

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

TYPE OF COMMITTEE	Subcommittee
SUBORDINATE TO	Council
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><b>Chairperson:</b></p> <p>The chair of the subcommittee for the 2025 to 2028 triennium will be Councillor Christine Menzies.</p> <p><b>Members:</b></p> <ul style="list-style-type: none"> <li>• a representative from or recommended by each of the approved operators named under the Stewart Island/Rakiura Visitor Levy Policy</li> <li>• one community board representative</li> <li>• the chair of the Finance and Assurance Committee</li> <li>• a member from Stewart Island/Rakiura</li> <li>• a member to represent iwi</li> <li>• the councillor for Stewart Island/Rakiura Ward</li> </ul>
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"> <li>(a) determining strategic outcomes for the Stewart Island/Rakiura visitor levy fund</li> <li>(b) making decisions regarding funding applications to the Stewart Island/ Rakiura visitor levy fund.</li> <li>(c) setting policy in relation to the collection and enforcement of the Stewart Island/Rakiura visitor levy.</li> </ol>



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1 Opening

The chair will open the meeting.

2 Apologies

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

3 Leave of absence

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

4 Conflict of interest

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.

5 Additional agenda items

Any additions to the agenda must be approved by resolution with an explanation as to why they cannot be delayed until a future meeting.

6 Confirmation of minutes

[Minutes](#) of the Stewart Island/Rakiura Visitor Levy Subcommittee Meeting held on 10 June 2025.

Confidential Minutes of the Stewart Island/Rakiura Visitor Levy Subcommittee Meeting held on 10 June 2025.

7 Public participation

Requests to speak should be made by midday of the day before the meeting. Further information is available on [www.southlanddc.govt.nz](http://www.southlanddc.govt.nz) or phoning 0800 732 732.

8 Reports

Page

8.1 Stewart Island Visitor Levy - allocations for May 2026 funding round

13

9 Closure

The chair will close the meeting.



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## Stewart Island/Rakiura Visitor Levy Subcommittee

### OPEN MINUTES

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Minutes of a meeting of Stewart Island/Rakiura Visitor Levy Subcommittee held in the Pavilion, 7 Ayr Street, Oban, Stewart Island on Tuesday, 10 June 2025 at 10.15am. (10.15am – 11.44am, 11.52am – 12.41pm (PE 11.52am – 12.41pm))

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#### PRESENT

Chairperson	Councillor Julie Keast	
Members	Aaron Conner	Stewart Island/Rakiura Community Board
	Bruce Ford	Stewart Island/Rakiura community representative
	Bill Moffatt	South East Air
	Paul Norris	Real NZ (via video link)
	Bruce Robertson	Chair - Finance and Assurance Committee
	Jon Spraggon	Stewart Island/Rakiura ward councillor

#### APOLOGIES

Lania Edwards	Local Iwi
Lyndon Cleaver	ISS McKay/Environment Southland

#### IN ATTENDANCE

Committee advisor – Fiona Dunlop  
Community Partnership Leader – Karen Purdue  
Community Liaison Officer – Kathryn Cowie (via video link)  
GM Customer and Community Wellbeing – Sam Marshall (via video link)

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1 Apologies

There were apologies from Lyndon Cleaver and Lania Edwards.

Resolution

Moved Cr Spraggon, seconded Member Conner and resolved:

That the Stewart Island/Rakiura Visitor Levy Subcommittee accept the apologies.

2 Leave of absence

There were no requests for leave of absence.

3 Conflict of interest

Councillor Spraggon declared a conflict of interest in relation to item 7.1 - Stewart Island Visitor Levy funding allocations - May 2025 round applications 2 and 4 (Stewart Island Promotions). He advised that he would not take part in discussion.

4 Extraordinary/urgent items

There were no extraordinary/urgent items.

5 Confirmation of minutes

Resolution

Moved Cr Spraggon, seconded Member Conner and resolved:

That the Stewart Island/Rakiura Visitor Levy Subcommittee confirms the minutes of the meeting held on 17 September 2024 as a true and correct record of that meeting.

6 Public participation

1. Aaron Joy representing the Stewart Island Promotions addressed the meeting in support of the two applications. One application was for an events manager and the other for the provision of free Wi-Fi.
2. Anita Geeson representing the Rakiura Heritage Trust addressed the meeting in support of the Trusts application.
3. Miriam Marshall representing the Lord Family Trust – Millars Beach restoration project addressed the meeting via video link in support of their application.
4. Dr Louise Chilvers representing Future Rakiura – sea lion project addressed the meeting in support of the application.

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## Reports

### 7.1 Stewart Island Visitor Levy funding allocations - May 2025 round

Record No: R/25/5/21946

Community Partnership Leader – Karen Purdue was in attendance for the item and Community Liaison Officer - Kathryn Cowie was in attendance via video link.

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

The Subcommittee noted that there were seven applications with requests totalling \$569,396 for 2024/2026 financial year, and \$20,000 in the 2025/2026 financial year as one application has a multi-year request.

#### Resolution

Moved member Robertson, seconded Member Ford and resolved:

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

#### Resolution

Moved Cr Spraggon, seconded Member Conner and resolved:

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That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- 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.

Resolution

Moved Member Ford, seconded member Moffatt and resolved:

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- 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.

Resolution

Moved Member Ford, seconded member Moffatt and resolved:

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- 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.**

Councillor Spraggon, Aaron Conner and Paul Norris requested that their dissenting votes be recorded.

Resolution

Moved member Moffatt, seconded Member Conner and resolved:

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- j) ~~approves/declines~~ a grant of \$1,043 to the Stewart Island Promotions Association to assist with the free waterfront Wi-Fi project.

Resolution

Moved Member Ford, seconded member Robertson and resolved:

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- k) ~~approves/declines~~ a grant of \$17,391 to the Rakiura Heritage Trust to assist with their operational costs.

Resolution

Moved Cr Spraggon, seconded Member Conner and resolved:

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- l) ~~approves/declines~~ a grant of \$8,380 to Future Rakiura for costs associated with a two-year sea lion study and information material.

Final resolutions:

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 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 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 a grant of \$7,582 to the Lord Family Trust to assist with costs **associated with the Millar’s Beach Restoration project**.
- j) approves a grant of \$1,043 to the Stewart Island Promotions Association to assist with the free waterfront Wi-Fi project.
- k) approves a grant of \$17,391 to the Rakiura Heritage Trust to assist with their operational costs.
- l) declines a grant of \$8,380 to Future Rakiura for costs associated with a two-year sea lion study and information material.

Public excluded

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

Resolution

Moved Member Robertson, seconded Member Conner and resolved:

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.

The public were excluded at 11.44am.

The meeting adjourned at 11.44am and reconvened at 11.52am.

Resolutions in relation to the confidential items are recorded in the confidential section of these minutes and are not publicly available unless released here.

The meeting concluded at 12.41pm.

CONFIRMED AS A TRUE AND CORRECT RECORD OF A MEETING OF THE STEWART ISLAND/RAKIURA VISITOR LEVY SUBCOMMITTEE HELD ON 10 JUNE 2025.

DATE:.....

CHAIRPERSON:.....

Summary of reports

	Report name	Purpose	Report type	Page
8.1	Stewart Island Visitor Levy - allocations for May 2026 funding round	The purpose of this report is for the Stewart Island/Rakiura Visitor Levy Subcommittee to consider applications received for the 2026 funding round.	Decision	13

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## Stewart Island Visitor Levy - allocations for May 2026 funding round

Record no: R/26/5/117345  
Author: Kathryn Cowie, Community liaison officer  
Approved by: Sam Marshall, Group manager customer and community wellbeing  
Report type: Decision

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### Purpose

- 1 The purpose of this report is for the Stewart Island/Rakiura Visitor Levy Subcommittee to consider applications received for the 2026 funding round.

### Staff recommendations

That the Stewart Island/Rakiura Visitor Levy Subcommittee:

- a) notes the information contained in the report.
- b) notes that the matter or decision in this report is assessed as being administrative but not significant based on Council's Significance and Engagement Policy and therefore not significant. The assessed level of significance indicates that the community is kept informed of the decisions made in this report, rather than engaged prior to this decision being made.
- c) determines that it has complied with the decision-making requirements of the Local Government Act 2002 for this decision, and as required under section 79 that, it does not need any more information, option assessments, costs and benefits analysis before making this decision.
- d) receives applications from the Stewart Island/Rakiura Community Board, Stewart Island Promotion Association, Rakiura Heritage Trust and Stewart Island Rakiura Community Environment Trust.
- e) approves a grant of \$100,000 to the Stewart Island/Rakiura Community Board for the Golden Bay wharf redevelopment.
- f) approves a grant of \$10,000 to the Stewart Island/Rakiura Community Board for information panels.
- g) approves a grant of \$1,000 to the Stewart Island Promotion Association for free visitor wi-fi.
- h) approves a grant of \$30,000 to the Rakiura Heritage Trust for operational costs.
- i) approves a grant of \$38,600 per year for two years to the Stewart Island Rakiura Community Environment Trust for operational costs.

### 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.

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- 4 The financial report as of 31 March 2026 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 \$382,110 budgeted for grants this financial year, \$39,929 is already committed from previous years leaving an available budget of \$342,181. There is \$961,271 in total available in reserves to distribute.
- 6 Five applications have been received, with requests totalling \$179,600 for this financial year, and \$38,600 in the next financial year as one applicant has a multi year request.
- 7 The \$39,919 committed for this financial year is from a multi year request from the 2025 funding round (\$20,000) and a loan repayment (\$19,929).
- 8 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.

#### Context

- 9 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.
- 10 Under the act, funds must be used to better provide services, facilities, amenities for island visitors, or mitigate environmental effects.
- 11 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).
- 12 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.
- 13 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.
- 14 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.
- 15 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
<b>Council/community owned infrastructure</b>	60-70% of funds available annually
<b>Operational costs</b>	20-25% of funds available annually
<b>Community projects</b>	5-10% of funds available annually

Table 2

2025/2026 Allocation guideline amounts		
Allocation category	Percentage of budgeted funds (\$342,181)	Percentage of funds held in reserve (\$961,271)
<b>Council / community Infrastructure (60-70%)</b>	\$205,309 - \$239,527	\$576,763 - \$672,890
<b>Operational costs (20-25%)</b>	\$68,436 - \$85,545	\$192,254 - \$240,318
<b>Community projects (5-10%)</b>	\$17,109 - \$34,218	\$48,064 - \$96,127

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
<b>Council/community owned infrastructure</b>	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).
<b>Operational costs</b>	Up to three years (the current allocation round, and the next two allocation rounds)
<b>Community projects</b>	One year (just the current allocation round)

Table 4

<b>Requests per allocation category 2026</b>			
	<b>Council and community infrastructure (60-70% recommended)</b>	<b>Operational costs (20-25% recommended)</b>	<b>Community projects (5-10% recommended)</b>
<b>Total amount of requests</b>	\$129,929 (includes loan repayment of \$19,929)	\$88,600 (includes second year commitment for SIPA of \$20,000)	\$1,000
<b>Percentage of budgeted funds for 2025/2026 (\$342,181)</b>	38%	25.9%	0.3%
<b>Percentage of funds available in reserve for 2025/2026 (\$961,271)</b>	13.5%	9.2%	0.1%

The financial report for the Stewart Island Visitor Levy Fund as of 31 March 2026 is as follows:

Southland District Council Stewart Island/Rakiura Visitor Levy as at 31 March 2026			
2024/25 Year	<u>Summary</u>	Actual to date	Annual Budget
415,964	Opening Balance, 1 July 2025	664,316	-
	<u>Add</u>		
337,723	SI Levy	366,598	406,500
128,835	Fund reserved for prior year commitments	123,402	-
14,311	Interest - Operating Investment	5,543	6,384
23,255	Interest 2025/26	-	23,255
<b>920,088</b>	<b>Total Funds</b>	<b>1,136,605</b>	<b>412,884</b>
	<u>Less</u>		
73,714	Prior year commitments (not yet uplifted)	123,402	-
55,121	Prior year grants paid out	-	
11,900	Administration Fee	12,003	24,390
115,037	Current year commitments	39,929	
-	Miscellaneous Grant	-	382,110
<b>255,772</b>	<b>Total</b>	<b>175,334</b>	<b>406,500</b>
<b>664,316</b>	<b>Funds Held in Reserves (Available for distribution)</b>	<b>961,271</b>	<b>6,384</b>
	<b>Funds Approved to be Spent Remaining</b>	<b>342,181</b>	

### Prior year commitments

Year committed		Committed (\$)	Uplifted (\$)	Balance (\$)
2014–2015	Rakiura Heritage Centre Trust	50,000	50,000	0
2016–2017	Rakiura Heritage Trust	400	400	0
2016–2017	Stewart Island Promotions Association Inc	850	850	0
2016–2017	Stewart Island Promotions Association Inc	3,390	3,390	0
2016–2017	Stewart Island Promotions Association Inc	3,700	3,700	0
2016–2017	SIRCET	6,500	6,500	0
2016–2017	Southland District Council	25,600	25,600	0
2016–2017	Southland District Council	8,200	8,200	0
2016–2017	Southland District Council	2,223	2,223	0
2016–2017	Southland District Council	41,000	41,000	0

2016–2017	Stewart Island Jetties Subcommittee – Ulva Island Wharf	80,000	80,000	0
2021–2022	SI/Rakiura Community Board (Golden Bay Geotechnical Survey)	140,000	66,286	73,714
2024–2025	Stewart Island Rakiura Community & Environment Trust	34,688		34,688
2024–2025	SI/Rakiura Community Board – Information Panels	15,000		15,000
	<b>Total</b>	<b>\$1,355,305</b>	<b>\$1,231,903</b>	<b>\$1,231,402</b>

	<b>Committed</b>	<b>Uplifted</b>	<b>Balance</b>
<b><u>CURRENT YEAR COMMITMENTS</u></b>			
<b>Committed in May 2022</b>			
<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	19,929
<b>Committed in June 2025</b>			
2025-2026	Stewart Island Promotion Association events and promotions manager	20,000	20,000
<b>Total</b>	<b>39,929</b>	<b>-</b>	<b>39,929</b>
<b><u>FUTURE YEAR COMMITMENTS</u></b>			
<b>Committed in May 2022</b>			
<i>Work on Dundee Footpath completed in 2023/24 repayments to start 2024-25</i>			
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	
	<b>159,432</b>	<b>-</b>	<b>-</b>
<b><u>Refunds/Stale Cheques/Reversals</u></b>			
	<b>-</b>	<b>-</b>	<b>-</b>
	<b>-</b>	<b>-</b>	<b>-</b>

Discussion

- 16 The applications received are summarised below. The committee members, as representatives of their community will assess the applications and their benefit to the visitors of Stewart Island/Rakiura, or their mitigation on the adverse environmental effects of visitors to the island and will decide if and how much to allocate. The information in the tables below can aid to the discussion.
- 17 The committee need to be aware when allocating funding for this round, that they have also committed funding to the Golden Bay Walkway project from the 2025 funding round, but have not yet made a decision on how much to allocate and the method of allocation (i.e. ratio of lump sum funding to loan repayments).

Application summary

Applications received	5
Amount requested	\$179,600
Funds budgeted for distribution (prior commitments have been deducted)	\$342,181
Funds available for distribution (in reserve)	\$961,271

<p><b>1. Stewart Island/Rakiura Community Board – redevelopment of Golden Bay Wharf</b> Requests assistance with costs associated with stage one of the redevelopment of Golden Bay wharf – resource consent and design costs. Total project cost - \$2,000,000 <b>Amount requested - \$100,000</b></p>					
Eligibility assessment and strength of application	Allocation category	Funds requested as percentage of budgeted funds (\$342,181)	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 and community infrastructure	Amount requested is 29.2% of the budgeted funds available and is under the suggested amount of 60-70% for this category	2025 – Information panels (\$15,000) – <b>Yes</b>  2022 – Golden Bay Geotech Survey (\$140,000) – <b>Yes</b>	√	Outline of project or work
				√	Concept plans
				n/a	Resource or building consent
				n/a	Business plan
				n/a	Legal status of applicant
				√	Assessment of how project will benefit visitors or mitigate effects of visitors

**2. Stewart Island/Rakiura Community Board – interpretation panels**  
Requests assistance with costs associated with installing interpretation panels in four locations on Stewart Island Rakiura.

Total project cost - \$10,000  
**Amount requested - \$10,000**

Eligibility assessment and strength of application	Allocation category	Funds requested as percentage of budgeted funds (\$342,181)	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 and community infrastructure	Amount requested is 2.9% of the budgeted funds available and is under the suggested amount of 60-70% for this category	2025 – Information panels (\$15,000) – <b>Yes</b>  2022 – Golden Bay Geotech Survey (\$140,000) – <b>Yes</b>	√	Outline of project or work
				√	Concept plans
				n/a	Resource or building consent
				n/a	Business plan
				n/a	Legal status of applicant
				√	Assessment of how project will benefit visitors or mitigate effects of visitors

**3. Stewart Island Promotion Association – free public wi-fi**  
Requests assistance with costs associated with providing free wi-fi on Elgin Terrace to visitors on the island which assists them in booking accommodation and other travel plans and activities.

Total project cost - \$1,000  
**Amount requested - \$1,000**

Eligibility assessment and strength of application	Allocation category	Funds requested as percentage of budgeted funds (\$342,181)	Previous funding and accountability returned	Documentation requirements met	
Yes, consistent with section 6(b) of the act,	Community project	Amount requested (\$1,000) is	2025 – free wi - fi project (\$1,200) –	√	Outline of project or work
				n/a	Concept plans

request is for activities that are used by and benefit visitors to the island.		0.3% of the budgeted funds available and is under the suggested amount of 5-10% for this category	<b>Yes</b>	n/a	Resource or building consent
			2024 – free wi-fi project (\$574) – <b>Yes</b>	n/a	Business plan
			2021 – free wi-fi project (\$1,068) – <b>Yes</b>	√	Legal status of applicant
			2021 – map printing costs (\$1,943) – <b>Yes</b>	√	Assessment of how project will benefit visitors or mitigate effects of visitors

**4. Rakiura Heritage Trust – operational costs**

Requests assistance with operational costs of the heritage centre – specifically electricity, diesel heating, accounting fees, insurance, and wages.

Total project cost - \$150,000

**Amount requested - \$30,000**

<b>Eligibility assessment and strength of application</b>	<b>Allocation category</b>	<b>Funds requested as percentage of budgeted funds (\$342,181)</b>	<b>Previous funding and accountability returned</b>	<b>Documentation requirements met</b>	
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 8.8% of the budgeted funds available and is under the suggested amount of 20-25% for this category	2025 – operational costs (\$17,391) – <b>Yes</b>	√	Outline of project or work
				n/a	Concept plans
			2024 – operational costs (\$30,000) – <b>Yes</b>	n/a	Resource or building consent
				n/a	Business plan
			√	Legal status of applicant	
			√	Assessment of how project will benefit	
2022 – operational					

			costs (\$20,000) – <b>Yes</b>		visitors or mitigate effects of visitors
			2020 – operational costs (\$30,000) – <b>Yes</b>		

**5. Stewart Island/Rakiura Community and Environment Trust – community liaison role**  
 Requests assistance with costs associated with the community liaison role that involves - engages directly with visitors through conservation participation, environmental learning, coordinating volunteer environmental activities and visiting schools.

Total project cost - \$43,600 per year for two years  
**Amount requested - \$38,600 per year for two years**

Eligibility assessment and strength of application	Allocation category	Funds requested as percentage of budgeted funds (\$342,181)	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.	Operational costs	Amount requested is 11.3% of the budgeted funds available and is under the suggested amount of 20-25% for this category	2024 – operational costs for community liaison role - \$34,688 per year for two years) – <b>Yes</b> for year one, year two due December 2026  2022 – operational costs for community liaison role (\$28,600 per year for two years) – <b>Yes</b>	√	Outline of project or work
				n/a	Concept plans
				n/a	Resource or building consent
				n/a	Business plan
				√	Legal status of applicant
				√	Assessment of how project will benefit visitors or mitigate effects of visitors

Options

18 The following reasonably practicable options have been identified and assessed in this report:

Option 1 - approve the funding applications in full or part

Option 2 - decline part of or the full application

Recommended option:

19 Option 1 - approve the funding applications in full or part

Option 1 – approve the funding applications in full or part

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

Option 2 – decline part of or the full application

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>there will be more money retained in the Stewart Island/Rakiura Visitor Levy Fund.</li> </ul>	<ul style="list-style-type: none"> <li>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</li> <li>eligible groups and organisations may not secure the required funding to deliver their proposed projects and initiatives.</li> </ul>

Legal considerations

20 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.

21 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.

Strategic alignment

**Strategic direction**

- 22 The Stewart Island Visitor Levy is designed to support local projects, organisations and Council and community infrastructure projects on Stewart Island/Rakiura and aligns with Councils strategic priorities of connected and resilient communities and providing robust infrastructure.
- 23 The funding decisions covered in this report reflect these objectives, ensuring that allocations contribute to the Long Term Plan social, cultural, environmental and economic outcomes.

### Policy and plan consistency

- 24 There are no inconsistencies identified.

### Financial considerations

- 25 There is \$382,110 budgeted for grants this financial year, \$39,929 is already committed from previous years, leaving an available budget of \$342,181. There is \$961,271 in total available in reserves to distribute.
- 26 The \$39,929 committed for this financial year is from a multi year request from the 2025 funding round (\$20,000) and a loan repayment (\$19,929).
- 27 Five applications have been received, with requests totalling \$179,600 for this financial year, and \$38,600 in the next financial year as one applicant has a multi year request.
- 28 The committee need to be aware when allocating funding for this round that they have also committed funding to the Golden Bay Walkway project from the 2025 funding round but have not yet made a decision on how much to allocate and the method of allocation (i.e. ratio of lump sum funding to loan repayments).
- 29 The subcommittee may allocate funding over the budgeted amount if they wish to do so.
- 30 Any amount allocated over the 2025/2026 budget of \$342,181 will require an unbudgeted expenditure report to Council.

### Significance assessment

- 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.

Level	Likelihood of engagement
Some importance or administrative	Council is not likely to carry out any engagement.
Moderate importance	Council may choose whether it carries out engagement, which may be targeted to directly affected individuals or groups.
Significant	Council will engage with directly affected individuals and groups and wider community engagement is likely, unless there are reasons under policy not to.

Critical	Council will engage with directly affected individuals and groups and wider community engagement is highly likely, unless there are reasons under policy not to.
----------	--

#### Community views

- 34 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 the 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.

#### Climate change considerations

- 35 There are no climate change considerations relevant to this matter or discussion.

#### Risk and mitigations

- 36 There are no significant risks in relation to this matter or decision, and grants made, do follow an accountability process to ensure the funds are fully spent on the agreed purpose.

#### Next steps

- 37 Applicants will be advised of the outcome and payments made accordingly.

#### Attachments

- A SIVL applications - May 2026 - part 1 [↓](#)
- B SIVL applications - May 2026 - part 2 [↓](#)
- C Stewart Island Rakiura Visitor Levy Policy - adopted 17 May 2023 - amended on 13 December 2023 [↓](#)



**Stewart Island Visitor Levy application**  
**May 2026 funding round**

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# 1. Stewart Island Rakiura Community Board – Golden Bay jetty redevelopment (stage 1)

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 2:59PM NZST

## Organisation details

**\* indicates a required field**

### Applicant details

**Applicant name \***

Stewart Island Rakiura Community Board

**Street Address \***

15 Forth Street  
Invercargill 9840 New Zealand  
Any, but at least one field is required.

**Applicant Postal Address (if different from above) \***

15 Forth Street  
Invercargill 9840 New Zealand  
Any, but at least one field is required.

**Phone Number \***

0800 732 732  
Must be a New Zealand phone number.

**Email \***

jacqui.lighthart@southlanddc.govt.nz  
Must be an email address.

**Purpose or main activity of your organisation**

Local Government

### Contact details for this application

**Name 1 \***

Jacqui Lighthart

**Phone Number \***

0800 732 732  
Must be a New Zealand phone number.

**Email \***

jacqui.lighthart@southlanddc.govt.nz  
Must be an email address.

**Name 2 \***

Aaron "Squirt" Conner

**Phone Number \***

0800 732 732  
Must be a New Zealand phone number.

Page 1 of 8

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 2:59PM NZST

**Email \***

Must be an email address.

## Application details

**\* indicates a required field**

### Project Details

**What are you applying for? (please tick all that apply) \***

- Funding for an activity or facility used by, or for the benefit of, visitors to Stewart Island/Rakiura
- Funding for an activity or facility to mitigate the adverse effects on the environment from visitors to Stewart Island/Rakiura

**Please provide a short title for your project: \***

Redevelopment of Golden Bay Wharf

**What is the location of your project? \***

Golden Bay, Rakiura Stewart Island

**For what purpose does your organisation seek a Stewart Island/Rakiura Visitor Levy grant? (please upload a separate sheet if necessary in the supporting documents section) \***

The wharf at Golden Bay is nearing end of life and needs replaced.

To start the process, resource consents need to be applied for and approved. A detailed design and contract specification needs to be developed taking into consideration and addressing all the requirements of the new wharf structure.

Considerations need to include:

Structure to suit the need of all users from Ferry to smaller water taxi type vessels.

A design life of 80- 100 years.

A low maintenance structure requiring minimal maintenance over the life of the asset.

How the structure will be fixed to the seabed.

Protection from the weather in the way of a breakwater structure designed specific to this location.

The size and weight loading capability to be able to berth the Ferry in emergency situations ie bad weather or a failure at the main wharf.

Safety in design allowing for safe and efficient construction and use post construction, complying with all relevant standards and codes of practice.

Having a detailed design will allow council to go to market with the confidence of receiving competitive pricing from contractors with a clear understanding of council expectations.

This reduces the risk of scope creep and variations during construction.

A tender process will be conducted for the professional services to design and provide construction monitoring during construction.

Some preliminary work has been carried out which will aid in the development of a suitable

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 2:59PM NZST

design.

Please assume that we know nothing about your project - give as much information as possible.

**How will your project directly benefit visitors or mitigate the adverse environmental effects of visitors to the island? (please upload a separate sheet if necessary in the supporting documents section) \***

Currently a large number of visitors use the Golden Bay wharf for visiting Ulva Island in particular and travel to other jetties. Upgrading the wharf will ensure safety standards are met and visitors will have a high quality experience.

**Does your project relate to infrastructure or facility capital works?**

yes

no

No more than 1 choice may be selected.

**If yes, who owns the infrastructure or facility?**

Southland District Council

**What is the current status of the facility or infrastructure?**

The wharf at Golden Bay is nearing end of life and needs replaced. As a result of structural inspection, several issues were identified that needed to be done to maintain the structure in its current condition. This included repairs to the deck, bracing and structural elements. These repairs will not extend the life of the current structure.

Is it open or closed? Is it currently unusable due to work needing to be done etc.

**Does the facility have a long-term maintenance plan?**

yes

no

No more than 1 choice may be selected.

**If yes, please upload your long-term maintenance plan here:**

*No files have been uploaded*

**Does your project involve conceptual or site plans?**

yes

no

No more than 1 choice may be selected.

**If yes, please upload your concept or site plans here:**

*No files have been uploaded*

**Does your project require resource or building consent?**

yes

no

No more than 1 choice may be selected.

**If yes, please state the stage of approval**

Page 3 of 8

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 2:59PM NZST

A resource consent is required and possibly a building consent. These are contingent on funding approval for the project to proceed

### Presentation

Applicants can choose to make a presentation in support of their application. Presentations are limited to five minutes. An additional five minutes will be available for questions from the Stewart Island/Rakiura Visitor Levy Committee if required. Applicants will be advised of the time, date and location of presentations.

**Do you wish to make a presentation in support of my application? \***

- yes  
 no  
 I am available if required by the committee

No more than 1 choice may be selected.

### Financial details

**\* indicates a required field**

#### Bank details

**Bank Account \***

Account Name: Southland District Council

Account Number:

Must be a valid New Zealand bank account format.

**Please upload verification of organisation's bank account details \***

Filename: SDC bank details.pdf

File size: 39.5 kB

i.e. a bank coded deposit slip or bank verified account details

**Are you registered for GST? \***

- yes  
 no

No more than 1 choice may be selected.

**If yes, GST number:**

51850238

Must be a number.

**Please upload your organisations latest financial accounts \***

Filename: SDC no response.pdf

File size: 6.0 kB

**Please upload your organisations latest bank statement \***

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 2:59PM NZST

Filename: SDC no response.pdf  
 File size: 6.0 kB

**Total Project Cost \***

\$2,000,000.00

Must be a dollar amount

What is the total budgeted cost (dollars) of your project?

**Amount you are requesting from the Stewart Island Visitor Levy fund? \***

100000

Must be a number.

**Is this application for multi-year funding?**

- yes  
 no

**Please indicate your current level of reserves: \***

0

Must be a number.

**Please comment on your current level of reserves and if they cannot be used for this project, explain why: \***

There are no reserves as they are committed through the Long Term Plan to other projects. The community board also feel that infrastructure projects such as this should not become a burden on the Island's small ratepayer base. The Stewart Island Visitor Levy was introduced because there was a recognition that the Island has a small resident population and was a destination for a large number of short term visitors which creates a unique funding challenge for council to provide the infrastructure required.

**Briefly describe any voluntary effort or donated materials provided for this project**

Nil

e.g. working bee by committee, number of planning hours/meetings for an event etc

**How to you envisage paying for the future operational costs of this project (if applicable)**

Through the annual plan maintenance budgets

**Project Budget**

Applicants that are GST registered - please provide figures that **exclude** GST.

Applicants that are not GST registered - please provide figures that **include** GST.

List all the income that you plan to get towards your project (e.g. grants/donations, your own funds, fundraising). **Also include the grant amount you are requesting for this application (income and expenditure totals must match).**

Income	\$	Expenditure	\$
	\$100,000.00		\$100,000.00

Page 5 of 8

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**  
 Form Submitted 5 May 2026, 2:59PM NZST


**Project Budget Totals**

The income and expenditure totals should balance/match.

<b>Total Income Amount</b>	<b>Total Expenditure Amount</b>	<b>Income - Expenditure</b>
\$100,000.00	\$100,000.00	\$0.00
<small>This number/amount is calculated.</small>	<small>This number/amount is calculated.</small>	<small>This number/amount is calculated.</small>

**Quotes**

You should obtain at least two quotes where practicable. If this is not possible, please just explain why below.

**Have you sought at least two quotes?**

- yes
  - no
- No more than 1 choice may be selected.

**Please upload quote(s)**  
*No files have been uploaded*

**If you have not provided more than one quote, please explain why:**  
 As mentioned earlier, a tender process will be conducted for the professional services required during the consenting and design process

**Additional information**

**If you have any additional comments about your budget please detail here:**  
 It should be noted that the budget required for preparation work is likely to be more than the \$100,000 being applied for at this time. As the timeframe for preparation work to be completed is highly likely to be more than 1 year, the community board's thinking was that the \$100,000 applied for would be appropriate for the first twelve months of work required and they would have more accurate information about what preparation work was still required for a further application to the 2027 funding round.

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 2:59PM NZST

## Supporting documentation

### Supporting documentation

Please upload any supporting documentation here (i.e. letters of support, supplementary information from questions in the application, covering letter etc)

You may upload multiple documents.

#### Attach documents here

Filename: Golden Bay Masterplan Final\_Version 20260410\_low\_res.pdf  
File size: 13.6 MB

Filename: Stewart Island Jetties LTP Projects 2024-2034.docx  
File size: 119.2 kB

#### If you have any additional comments about your application please detail here:

The replacement of the Golden Bay Wharf was included the Southland District Council Long term Plan 2024-2034 and in the Golden Bay Master Plan. Preparation work needs to be commenced as soon as possible to ensure that construction of the replacement wharf can commence in 2028-29 financial year.

## Feedback

#### How did you find out about the Stewart Island Visitor Levy Fund?

Have applied previously  Southland District Council website  Council or Community Board Facebook page  Radio  Newspaper  Online  Referred by another funder  Word of mouth  Council staff  Other

No more than 1 choice may be selected.

#### PLEASE RATE THE FOLLOWING STATEMENTS

##### The time required to prepare and complete the application was reasonable

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

##### The application process is very straightforward

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**Please provide any feedback or suggestions about any improvements we could make to the application process:**

## Declaration

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL001MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 2:59PM NZST

**\* indicates a required field**

### Declaration

I consent to the Southland District Council collecting personal details provided on this form. The consent is given in accordance with the Privacy Act 2020.

This declaration and authorisation relates to information in this application and attachments that the Southland District Council may hold about your organisation/group now or in the future.

In making this declaration I declare that:

- this application has been submitted with the full knowledge and agreement of the management/governance of my organisation/group;
- the information supplied in this application and any attachments is true and factual;
- any grant received will be used for the purpose for which it was approved.

I authorise Southland District Council to:

- use the information supplied as part of this application and any attachments for the purposes of administration and consideration of this application;
- make any enquiries of third parties, (which may involve discussing information contained in this application);
- advertise or publish the name of our organisation/group and the amount of any grant approved if this application is successful, including disclosure of this information to other funding agencies.

I acknowledge that:

- any decision made is final
- Southland District Council has the right to withdraw any grant approved or demand the return of funds already paid if it is discovered that any statement made in this application is incorrect, incomplete or misleading, in a way that may have affected the funding decision.

**I am authorised to complete this application and I have read and understood this declaration and privacy statement:**

**Name 1 \***

Jacqui Ligthart

**Position in organisation \***

Acting Community Facilities Manager

**Date \***

05/05/2026

Must be a date.



## Stewart Island Visitor Levy application

May 2026 funding round

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# 2. Stewart Island Rakiura Community Board – interpretation panels

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**  
Form Submitted 5 May 2026, 3:59PM NZST

## Organisation details

\* indicates a required field

### Applicant details

**Applicant name \***

Stewart Island Rakiura Community Board

**Street Address \***

15 Forth Street  
Invercargill  
Southland Invercargill 9840 New Zealand  
Any, but at least one field is required.

**Applicant Postal Address (if different from above) \***

15 Forth Street  
Invercargill  
Southland Invercargill 9840 New Zealand  
Any, but at least one field is required.

**Phone Number \***

0800 732 732  
Must be a New Zealand phone number.

**Email \***

karen.purdue@southlanddc.govt.nz  
Must be an email address.

**Purpose or main activity of your organisation**

Southland District Council is a territorial authority committed to the needs of both people living in the District and those that will one day all Southland home.

### Contact details for this application

**Name 1 \***

Louise Pagan

**Phone Number \***

0800 732 732  
Must be a New Zealand phone number.

**Email \***

louise.pagan@southlanddc.govt.nz  
Must be an email address.

**Name 2 \***

Aaron "Squirt" Conner

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 3:59PM NZST

**Phone Number \***

0800 732 732

Must be a New Zealand phone number.

**Email \***

Must be an email address.

## Application details

**\* indicates a required field**

### Project Details

**What are you applying for? (please tick all that apply) \***

Funding for an activity or facility used by, or for the benefit of, visitors to Stewart Island/Rakiura

Funding for an activity or facility to mitigate the adverse effects on the environment from visitors to Stewart Island/Rakiura

**Please provide a short title for your project: \***

Interpretation panels at various Stewart Island Rakiura locations

**What is the location of your project? \***

Stewart Island Rakiura

**For what purpose does your organisation seek a Stewart Island/Rakiura Visitor Levy grant? (please upload a separate sheet if necessary in the supporting documents section) \***

To install interpretation panels at locations of significance in Stewart Island Rakiura

Please assume that we know nothing about your project - give as much information as possible.

**How will your project directly benefit visitors or mitigate the adverse environmental effects of visitors to the island? (please upload a separate sheet if necessary in the supporting documents section) \***

In the Murihiku Southland Destination Strategy one of the guiding principles is Manaakitanga. We want to welcome visitors and share our region and its unique stories while at the same time we understand that as good hosts we need to make sure visitors' needs are addressed as well as our own. Some of the needs listed include that visitors are looking for authentic and connected experiences and improved knowledge and understanding of the areas they visit. Interpretation panels telling the story of these locations on the Island will satisfy those needs.

**Does your project relate to infrastructure or facility capital works?**

yes

no

No more than 1 choice may be selected.

Page 2 of 8

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 3:59PM NZST

**If yes, who owns the infrastructure or facility?**

Southland District Council

**What is the current status of the facility or infrastructure?**

These are new panels.

Is it open or closed? Is it currently unusable due to work needing to be done etc.

**Does the facility have a long-term maintenance plan?**

yes

no

No more than 1 choice may be selected.

**If yes, please upload your long-term maintenance plan here:**

*No files have been uploaded*

**Does your project involve conceptual or site plans?**

yes

no

No more than 1 choice may be selected.

**If yes, please upload your concept or site plans here:**

*No files have been uploaded*

**Does your project require resource or building consent?**

yes

no

No more than 1 choice may be selected.

**If yes, please state the stage of approval**

## Presentation

Applicants can choose to make a presentation in support of their application. Presentations are limited to five minutes. An additional five minutes will be available for questions from the Stewart Island/Rakiura Visitor Levy Committee if required. Applicants will be advised of the time, date and location of presentations.

**Do you wish to make a presentation in support of my application? \***

yes

no

I am available if required by the committee

No more than 1 choice may be selected.

## Financial details

**\* indicates a required field**

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**  
Form Submitted 5 May 2026, 3:59PM NZST

### Bank details

**Bank Account \***

Account Name: Southland District Council

Account Number:  
Must be a valid New Zealand bank account format.

**Please upload verification of organisation's bank account details \***

Filename: SDC bank details.pdf  
File size: 39.5 kB  
i.e. a bank coded deposit slip or bank verified account details

**Are you registered for GST? \***

yes  
 no  
No more than 1 choice may be selected.

**If yes, GST number:**

51850238  
Must be a number.

**Please upload your organisations latest financial accounts \***

Filename: SDC no response.pdf  
File size: 6.0 kB

**Please upload your organisations latest bank statement \***

Filename: SDC no response.pdf  
File size: 6.0 kB

**Total Project Cost \***

\$10,000.00  
Must be a dollar amount.  
What is the total budgeted cost (dollars) of your project?

**Amount you are requesting from the Stewart Island Visitor Levy fund? \***

10000  
Must be a number.

**Is this application for multi-year funding?**

yes  
 no

**Please indicate your current level of reserves: \***

0  
Must be a number.

**Please comment on your current level of reserves and if they cannot be used for this project, explain why: \***

Page 4 of 8

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**  
 Form Submitted 5 May 2026, 3:59PM NZST

Reserves are committed to other projects in the Long Term Plan and the community board believes that projects for the benefit of visitors should not be at the cost of the local ratepayer.

**Briefly describe any voluntary effort or donated materials provided for this project**

Council staff will provide the design work for the panels. Assistance from the Rakiura Museum in regard to accessing history information is also available

e.g. working bee by committee, number of planning hours/meetings for an event etc

**How to you envisage paying for the future operational costs of this project (if applicable)**

Any future costs will be very minimal and would come from the community board budgets.

**Project Budget**

Applicants that are GST registered - please provide figures that **exclude** GST.

Applicants that are not GST registered - please provide figures that **include** GST.

List all the income that you plan to get towards your project (e.g. grants/donations, your own funds, fundraising. **Also include the grant amount you are requesting for this application (income and expenditure totals must match).**

Income	\$	Expenditure	\$
	\$10,000.00		\$10,000.00

**Project Budget Totals**

The income and expenditure totals should balance/match.

<b>Total Income Amount</b>	<b>Total Expenditure Amount</b>	<b>Income - Expenditure</b>
\$10,000.00	\$10,000.00	\$0.00
<small>This number/amount is calculated.</small>	<small>This number/amount is calculated.</small>	<small>This number/amount is calculated.</small>

**Quotes**

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 3:59PM NZST

You should obtain at least two quotes where practicable. If this is not possible, please just explain why below.

**Have you sought at least two quotes?**

yes

no

No more than 1 choice may be selected.

**Please upload quote(s)**

Filename: Interpretation panels Lou Pagan.msg

File size: 115.0 kB

**If you have not provided more than one quote, please explain why:**

Council will be doing some of the work in house and quotes will be sought for the production of the panels once funding is confirmed.

**Additional information**

**If you have any additional comments about your budget please detail here:**

The interpretation panels from the 2025 funding round have been installed and have received wonderful feedback from visitors. Photographs are attached to this application.

**Supporting documentation**

**Supporting documentation**

Please upload any supporting documentation here (i.e. letters of support, supplementary information from questions in the application, covering letter etc)

You may upload multiple documents.

**Attach documents here**

Filename: Interpretation Panels Stewart Island Rakiura.docx

File size: 4.7 MB

**If you have any additional comments about your application please detail here:**

The interpretation panels produced, with funding from the 2025 Stewart Island Rakiura funding round have been well received by visitors to the island. Photos supplied in attachment.

**Feedback**

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 3:59PM NZST

**How did you find out about the Stewart Island Visitor Levy Fund?**

Have applied previously  Southland District Council website  Council or Community Board Facebook page  Radio  Newspaper  Online  Referred by another funder  Word of mouth  Council staff  Other

No more than 1 choice may be selected.

**PLEASE RATE THE FOLLOWING STATEMENTS**

**The time required to prepare and complete the application was reasonable**

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**The application process is very straightforward**

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**Please provide any feedback or suggestions about any improvements we could make to the application process:**

## Declaration

**\* indicates a required field**

### Declaration

I consent to the Southland District Council collecting personal details provided on this form. The consent is given in accordance with the Privacy Act 2020.

This declaration and authorisation relates to information in this application and attachments that the Southland District Council may hold about your organisation/group now or in the future.

In making this declaration I declare that:

- this application has been submitted with the full knowledge and agreement of the management/governance of my organisation/group;
- the information supplied in this application and any attachments is true and factual;
- any grant received will be used for the purpose for which it was approved.

I authorise Southland District Council to:

- use the information supplied as part of this application and any attachments for the purposes of administration and consideration of this application;
- make any enquiries of third parties, (which may involve discussing information contained in this application);
- advertise or publish the name of our organisation/group and the amount of any grant approved if this application is successful, including disclosure of this information to other funding agencies.

I acknowledge that:

- any decision made is final

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL002MAY26 From Stewart Island Rakiura Community Board**

Form Submitted 5 May 2026, 3:59PM NZST

- Southland District Council has the right to withdraw any grant approved or demand the return of funds already paid if it is discovered that any statement made in this application is incorrect, incomplete or misleading, in a way that may have affected the funding decision.

**I am authorised to complete this application and I have read and understood this declaration and privacy statement:**

**Name 1 \***

Louise Pagan

**Position in organisation \***

Strategic Communications and Engagement Manager

**Date \***

05/05/2026

Must be a date.



## **Stewart Island Visitor Levy application**

**May 2026 funding round**

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# 3. Stewart Island Promotion Association – free visitor wifi Elgin Terrace

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL005MAY26 From Stewart Island Promotion Association, Inc.**

Form Submitted 27 Apr 2026, 3:17PM NZST

## Organisation details

\* indicates a required field

### Applicant details

**Applicant name \***

Stewart Island Promotion Association, Inc.

**Street Address \***

10 Ayr St  
Halfmoon Bay Stewart Island 9818 New Zealand  
Any, but at least one field is required.

**Applicant Postal Address (if different from above) \***

Stewart Island.  
P. O. Box 90  
Stewart Island. 9846 New Zealand  
Any, but at least one field is required.

**Phone Number \***

must be a New Zealand phone number.

**Email \***

Must be an email address.

**Purpose or main activity of your organisation**

To promote Stewart Island/Rakiura as a place to visit, live and work.

### Contact details for this application

**Name 1 \***

ANITA GEESON

**Phone Number \***

must be a New Zealand phone number.

**Email \***

must be an email address.

**Name 2 \***

JON SPRAGGON

**Phone Number \***

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL005MAY26 From Stewart Island Promotion Association, Inc.**

Form Submitted 27 Apr 2026, 3:17PM NZST

Must be a New Zealand phone number.

**Email \***

Must be an email address.

## Application details

**\* indicates a required field**

### Project Details

**What are you applying for? (please tick all that apply) \***

- Funding for an activity or facility used by, or for the benefit of, visitors to Stewart Island/Rakiura  
 Funding for an activity or facility to mitigate the adverse effects on the environment from visitors to Stewart Island/Rakiura

**Please provide a short title for your project: \***

Wi Fi on Elgin Terrace.

**What is the location of your project? \***

Elgin Terrace, Stewart Island.

**For what purpose does your organisation seek a Stewart Island/Rakiura Visitor Levy grant? (please upload a separate sheet if necessary in the supporting documents section) \***

To continue the provision of free Wi Fi access to the general public on Elgin Terrace.  
Please assume that we know nothing about your project - give as much information as possible.

**How will your project directly benefit visitors or mitigate the adverse environmental effects of visitors to the island? (please upload a separate sheet if necessary in the supporting documents section) \***

Visitors have an expectation that they will be able to readily access the internet while on the island. They plan their travel and book activities on line. The quality of their visitor experience is much improved if Wi Fi access causes minimal problems.

**Does your project relate to infrastructure or facility capital works?**

- yes  
 no

No more than 1 choice may be selected.

### Presentation

Applicants can choose to make a presentation in support of their application. Presentations are limited to five minutes. An additional five minutes will be available for questions from

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL005MAY26 From Stewart Island Promotion Association, Inc.**

Form Submitted 27 Apr 2026, 3:17PM NZST

the Stewart Island/Rakiura Visitor Levy Committee if required. Applicants will be advised of the time, date and location of presentations.

**Do you wish to make a presentation in support of my application? \***

- yes  
 no  
 I am available if required by the committee

No more than 1 choice may be selected.

## Financial details

**\* indicates a required field**

### Bank details

**Bank Account \***

Account Name: Stewart Island  
Promotion Association

Account Number:  
Must be a valid New Zealand bank account format.

**Please upload verification of organisation's bank account details \***

Filename: img183.jpg  
File size: 126.0 kB  
i.e. a bank coded deposit slip or bank verified account details

**Are you registered for GST? \***

- yes  
 no  
No more than 1 choice may be selected.

**If yes, GST number:**

24301946  
Must be a number.

**Please upload your organisations latest financial accounts \***

Filename: SIPA Audit 2026.pdf  
File size: 367.7 kB

**Please upload your organisations latest bank statement \***

Filename: img184.jpg  
File size: 633.2 kB

**Total Project Cost \***

\$1,000.00  
Must be a dollar amount.  
What is the total budgeted cost (dollars) of your project?

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL005MAY26 From Stewart Island Promotion Association, Inc.**  
 Form Submitted 27 Apr 2026, 3:17PM NZST

**Amount you are requesting from the Stewart Island Visitor Levy fund? \***

1000

Must be a number.

**Is this application for multi-year funding?**

yes

no

**Please indicate your current level of reserves: \***

58312

Must be a number.

**Please comment on your current level of reserves and if they cannot be used for this project, explain why: \***

Reserves are tagged for promotional projects (e.g. street map production, web maintenance.)

**Briefly describe any voluntary effort or donated materials provided for this project**

Administration tasks are carried out voluntarily.

e.g. working bee by committee, number of planning hours/meetings for an event etc

**How to you envisage paying for the future operational costs of this project (if applicable)**

Grant money if available.

**Project Budget**

Applicants that are GST registered - please provide figures that **exclude** GST.

Applicants that are not GST registered - please provide figures that **include** GST.

List all the income that you plan to get towards your project (e.g. grants/donations, your own funds, fundraising. **Also include the grant amount you are requesting for this application (income and expenditure totals must match).**

Income	\$	Expenditure	\$
Grant	\$869.57	Internet Plan	\$869.57

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL005MAY26 From Stewart Island Promotion Association, Inc.**

Form Submitted 27 Apr 2026, 3:17PM NZST

### Project Budget Totals

The income and expenditure totals should balance/match.

Total Income Amount	Total Expenditure Amount	Income - Expenditure
\$869.57	\$869.57	\$0.00
This number/amount is calculated.	This number/amount is calculated.	This number/amount is calculated.

### Quotes

You should obtain at least two quotes where practicable. If this is not possible, please just explain why below.

**Have you sought at least two quotes?**

yes

no

No more than 1 choice may be selected.

**Please upload quote(s)** \* See yellow highlighted line in financial statements  
*No files have been uploaded*

### Additional information

**If you have any additional comments about your budget please detail here:**

The cost of the internet plan tends to vary over time. The sum requested is an average of what is expected.

### Supporting documentation

#### Supporting documentation

Please upload any supporting documentation here (i.e. letters of support, supplementary information from questions in the application, covering letter etc)

You may upload multiple documents.

**Attach documents here**

*No files have been uploaded*

**If you have any additional comments about your application please detail here:**

### Feedback

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL005MAY26 From Stewart Island Promotion Association, Inc.**

Form Submitted 27 Apr 2026, 3:17PM NZST

**How did you find out about the Stewart Island Visitor Levy Fund?**

- Have applied previously  Southland District Council website  Council or Community Board Facebook page  Radio  Newspaper  Online  Referred by another funder  Word of mouth  Council staff  Other

No more than 1 choice may be selected.

**PLEASE RATE THE FOLLOWING STATEMENTS**

**The time required to prepare and complete the application was reasonable**

- Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**The application process is very straightforward**

- Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**Please provide any feedback or suggestions about any improvements we could make to the application process:**

**Declaration**

**\* indicates a required field**

**Declaration**

I consent to the Southland District Council collecting personal details provided on this form. The consent is given in accordance with the Privacy Act 2020.

This declaration and authorisation relates to information in this application and attachments that the Southland District Council may hold about your organisation/group now or in the future.

In making this declaration I declare that:

- this application has been submitted with the full knowledge and agreement of the management/governance of my organisation/group;
- the information supplied in this application and any attachments is true and factual;
- any grant received will be used for the purpose for which it was approved.

I authorise Southland District Council to:

- use the information supplied as part of this application and any attachments for the purposes of administration and consideration of this application;
- make any enquiries of third parties, (which may involve discussing information contained in this application);
- advertise or publish the name of our organisation/group and the amount of any grant approved if this application is successful, including disclosure of this information to other funding agencies.

I acknowledge that:

- any decision made is final

Page 6 of 7

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL005MAY26 From Stewart Island Promotion Association, Inc.**

Form Submitted 27 Apr 2026, 3:17PM NZST

- Southland District Council has the right to withdraw any grant approved or demand the return of funds already paid if it is discovered that any statement made in this application is incorrect, incomplete or misleading, in a way that may have affected the funding decision.

**I am authorised to complete this application and I have read and understood this declaration and privacy statement:**

**Name 1 \***

Anita Geeson

**Position in organisation \***

Chairperson

**Date \***

27/04/2026

Must be a date.



## **Stewart Island Visitor Levy application**

**May 2026 funding round**

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# 4. Rakiura

## Heritage Trust– operational costs

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL006MAY26 From Rakiura Heritage Trust.**  
Form Submitted 7 May 2026, 1:15PM NZST

## Organisation details

\* indicates a required field

### Applicant details

**Applicant name \***

Rakiura Heritage Trust.

**Street Address \***

11 Main Rd  
Halfmoon Bay Stewart Island 9818 New Zealand  
Any, but at least one field is required.

**Applicant Postal Address (if different from above) \***

P O Box 114  
Halfmoon Bay Stewart Island 9846 New Zealand  
Any, but at least one field is required.

**Phone Number \***

Must be a New Zealand phone number.

**Email \***

stewartislandmuseum@xtra.co.nz  
Must be an email address.

**Purpose or main activity of your organisation**

Museum.

### Contact details for this application

**Name 1 \***

Anita Geeson

**Phone Number \***

Must be a New Zealand phone number.

**Email \***

Must be an email address.

**Name 2 \***

Margaret Hopkins

**Phone Number \***

Must be a New Zealand phone number.

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL006MAY26 From Rakiura Heritage Trust.**  
 Form Submitted 7 May 2026, 1:15PM NZST

**Email \***

must be an email address.

**Application details**

\* indicates a required field

**Project Details****What are you applying for? (please tick all that apply) \***

- Funding for an activity or facility used by, or for the benefit of, visitors to Stewart Island/Rakiura
- Funding for an activity or facility to mitigate the adverse effects on the environment from visitors to Stewart Island/Rakiura

**Please provide a short title for your project: \***

Operational Expenses.

**What is the location of your project? \***

Main Road, Stewart Island.

**For what purpose does your organisation seek a Stewart Island/Rakiura Visitor Levy grant? (please upload a separate sheet if necessary in the supporting documents section) \***

The Rakiura Heritage Trust is requesting a grant to assist with the operating costs associated with non-negotiable expenses - electricity, diesel (heating), audit and accounting fees, insurance, maintenance and wages. These expenses invariably increase year on year with wages reviewed on an annual basis.

The recent escalation in the market price of electricity and diesel is an added budget constraint and is concerning.

Income from visitor entry charges and retail spending is directly impacted by the total number of visitors who are attracted to the island as a visitor destination in any given year. With numbers either declining or remaining static on a monthly basis income is not expected to increase markedly in the immediate future.

The museum cannot provide the services expected by visitors without employing staff to manage office duties, reception and retail activities for all weekday opening hours and, on occasions, weekends. Wage payments represents the biggest item of expenditure in the budget.

A traditional grant allocation for Operational Expenses from SDC has not been made this year as a review of the heritage fund is pending.

Please assume that we know nothing about your project - give as much information as possible.

**How will your project directly benefit visitors or mitigate the adverse environmental effects of visitors to the island? (please upload a separate sheet if necessary in the supporting documents section) \***

Rakiura Museum provides visitors with the opportunity to learn about the cultural heritage of Rakiura through the stories presented in the display gallery, audio-visual stories, information collections and by talking with staff, volunteers and other visitors.

The museum's policy of having daily advertised opening hours (every day except Christmas

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL006MAY26 From Rakiura Heritage Trust.**

Form Submitted 7 May 2026, 1:15PM NZST

Day) provides certainty and reliability to visitors when planning their stay.

There are very few inclement weather activities available to people while on the island and fewer still who provide a consistent service. Providing activities to visitors to participate in adds value to the overall visitor experience.

School Camp visits are a traditional part of annual visitation to the island with 25-30 groups visiting per annum. Time at the museum is part of the activity programme for each school. Participation in the educational activities provided has both educational and promotional benefits.

Additional benefits include access to toilet facilities and as a place to 'hangout' while waiting for travel connections or on a wet day.

**Does your project relate to infrastructure or facility capital works?**

yes

no

No more than 1 choice may be selected.

## Presentation

Applicants can choose to make a presentation in support of their application. Presentations are limited to five minutes. An additional five minutes will be available for questions from the Stewart Island/Rakiura Visitor Levy Committee if required. Applicants will be advised of the time, date and location of presentations.

**Do you wish to make a presentation in support of my application? \***

yes

no

I am available if required by the committee

No more than 1 choice may be selected.

## Financial details

**\* indicates a required field**

### Bank details

**Bank Account \***

Account Name: Rakiura Heritage Trust

Account Number:

Must be a valid New Zealand bank account format.

**Please upload verification of organisation's bank account details \***

Filename: RHT Deposit Slip.JPG

File size: 36.2 kB

i.e. a bank coded deposit slip or bank verified account details

**Are you registered for GST? \***

yes

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL006MAY26 From Rakiura Heritage Trust.**  
 Form Submitted 7 May 2026, 1:15PM NZST

no

No more than 1 choice may be selected.

**If yes, GST number:**

77115290

Must be a number.

**Please upload your organisations latest financial accounts \***

Filename: Rakiura Heritage Trust - Performance Report 2025 with Audit Report.pdf

File size: 300.6 kB

**Please upload your organisations latest bank statement \***

Filename: img185.jpg

File size: 736.9 kB

Filename: img186.jpg

File size: 1.0 MB

Filename: Westpac 1.jpg

File size: 586.1 kB

Filename: Westpac 2.jpg

File size: 1.4 MB

**Total Project Cost \***

\$150,000.00

Must be a dollar amount.

What is the total budgeted cost (dollars) of your project?

**Amount you are requesting from the Stewart Island Visitor Levy fund? \***

30000

Must be a number.

**Is this application for multi-year funding?**

yes

no

**Please indicate your current level of reserves: \***

271135

Must be a number.

**Please comment on your current level of reserves and if they cannot be used for this project, explain why: \***

Reserves have been tagged for a planned IT upgrade which has a budget of \$10,000; conservation costs and exhibition development.

**Briefly describe any voluntary effort or donated materials provided for this project**

Volunteer input into museum activities exceeds 3,000 hours per annum. This includes 780 hours of reception duties during weekends and when the receptionist is unavailable; 100 hours weekend cleaning; time spent on administration, planning/meetings and collection care.

e.g. working bee by committee, number of planning hours/meetings for an event etc

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL006MAY26 From Rakiura Heritage Trust.**

Form Submitted 7 May 2026, 1:15PM NZST

**How to you envisage paying for the future operational costs of this project (if applicable)**

Revenue includes door takings, retail sales, office services, donations, membership and if available grants.

**Project Budget**

Applicants that are GST registered - please provide figures that **exclude** GST.

Applicants that are not GST registered - please provide figures that **include** GST.

List all the income that you plan to get towards your project (e.g. grants/donations, your own funds, fundraising. **Also include the grant amount you are requesting for this application (income and expenditure totals must match).**

Income	\$	Expenditure	\$
Own Funds	\$120,000.00	Wages	\$65,000.00
VL Grant	\$30,000.00	Diesel Heating	\$19,000.00
		Insurance	\$15,886.00
		Audit	\$7,761.00
		Accounting	\$4,000.00
		Electricity	\$14,500.00
		Maintenance	\$5,768.00
		Administration	\$885.00
		Other	\$17,200.00

**Project Budget Totals**

The income and expenditure totals should balance/match.

Total Income Amount	Total Expenditure Amount	Income - Expenditure
\$150,000.00	\$150,000.00	\$0.00
This number/amount is calculated.	This number/amount is calculated.	This number/amount is calculated.

**Quotes**

You should obtain at least two quotes where practicable. If this is not possible, please just explain why below.

**Have you sought at least two quotes?**

yes

no

No more than 1 choice may be selected.

**Please upload quote(s)**

Page 5 of 8

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL006MAY26 From Rakiura Heritage Trust.**  
Form Submitted 7 May 2026, 1:15PM NZST

*No files have been uploaded*

### Additional information

**If you have any additional comments about your budget please detail here:**

Actual cost of electricity and diesel for budget purposes is difficult to estimate at the moment because of the general uncertainty in the market.

### Supporting documentation

#### Supporting documentation

Please upload any supporting documentation here (i.e. letters of support, supplementary information from questions in the application, covering letter etc)

You may upload multiple documents.

**Attach documents here**

*No files have been uploaded*

**If you have any additional comments about your application please detail here:**

While the Visitor Levy fund is intended to primarily fund activities and infrastructure that is of direct benefit to the visiting public ideally the value to the community itself should also be a consideration.

Rakiura Museum provides opportunities for local employment as well as serving as conservator for the heritage artefacts, documents and archival material placed in its care. The museum is valued by the community and is grateful for any financial support granted.

### Feedback

**How did you find out about the Stewart Island Visitor Levy Fund?**

Have applied previously  Southland District Council website  Council or Community Board Facebook page  Radio  Newspaper  Online  Referred by another funder  Word of mouth  Council staff  Other

No more than 1 choice may be selected.

### PLEASE RATE THE FOLLOWING STATEMENTS

**The time required to prepare and complete the application was reasonable**

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**The application process is very straightforward**

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL006MAY26 From Rakiura Heritage Trust.**  
Form Submitted 7 May 2026, 1:15PM NZST

**Please provide any feedback or suggestions about any improvements we could make to the application process:**

## Declaration

**\* indicates a required field**

### Declaration

I consent to the Southland District Council collecting personal details provided on this form. The consent is given in accordance with the Privacy Act 2020.

This declaration and authorisation relates to information in this application and attachments that the Southland District Council may hold about your organisation/group now or in the future.

In making this declaration I declare that:

- this application has been submitted with the full knowledge and agreement of the management/governance of my organisation/group;
- the information supplied in this application and any attachments is true and factual;
- any grant received will be used for the purpose for which it was approved.

I authorise Southland District Council to:

- use the information supplied as part of this application and any attachments for the purposes of administration and consideration of this application;
- make any enquiries of third parties, (which may involve discussing information contained in this application);
- advertise or publish the name of our organisation/group and the amount of any grant approved if this application is successful, including disclosure of this information to other funding agencies.

I acknowledge that:

- any decision made is final
- Southland District Council has the right to withdraw any grant approved or demand the return of funds already paid if it is discovered that any statement made in this application is incorrect, incomplete or misleading, in a way that may have affected the funding decision.

**I am authorised to complete this application and I have read and understood this declaration and privacy statement:**

**Name 1 \***

Anita Geeson

**Position in organisation \***

Chairperson

**Date \***

07/05/2026

Must be a date.



**Stewart Island Visitor Levy application**  
**May 2026 funding round**

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## 5. SIRCET– operational costs (community liaison role)

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL007MAY26 From Stewart Island Rakiura Community and Environment Trust**  
Form Submitted 8 May 2026, 12:30PM NZST

## Organisation details

**\* indicates a required field**

### Applicant details

**Applicant name \***

Stewart Island Rakiura Community and Environment Trust

**Street Address \***

25 Golden Bay Rd  
Halfmoon Bay Stewart Island 9818 New Zealand  
Any, but at least one field is required.

**Applicant Postal Address (if different from above) \***

25 Golden Bay Rd  
Halfmoon Bay Stewart Island 9818 New Zealand  
Any, but at least one field is required.

**Phone Number \***

Must be a New Zealand phone number.

**Email \***

community@sircet.org.nz  
Must be an email address.

**Purpose or main activity of your organisation**

Pursuing projects that enhance both our community and environment on Stewart Island for locals and visitors

### Contact details for this application

**Name 1 \***

Emma Simpson-Boyce

**Phone Number \***

Must be a New Zealand phone number.

**Email \***

community@sircet.org.nz  
Must be an email address.

**Name 2 \***

Shona Sangster

**Phone Number \***

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL007MAY26 From Stewart Island Rakiura Community and Environment Trust**

Form Submitted 8 May 2026, 12:30PM NZST

Must be a New Zealand phone number.

**Email \***

Must be an email address.

## Application details

\* indicates a required field

### Project Details

**What are you applying for? (please tick all that apply) \***

- Funding for an activity or facility used by, or for the benefit of, visitors to Stewart Island/Rakiura
- Funding for an activity or facility to mitigate the adverse effects on the environment from visitors to Stewart Island/Rakiura

**Please provide a short title for your project: \***

Community and Visitor Engagement Project

**What is the location of your project? \***

Oban, Stewart Island

**For what purpose does your organisation seek a Stewart Island/Rakiura Visitor Levy grant? (please upload a separate sheet if necessary in the supporting documents section) \***

SIRCET is seeking continued support from the Stewart Island/Rakiura Visitor Levy Fund to retain the Community Liaison role for a further two years. This role directly contributes to the purpose of the Visitor Levy by enhancing visitor experiences while helping to mitigate the environmental impacts associated with increasing visitation to Rakiura.

Since 2002, SIRCET has worked to protect and restore Oban's unique natural environment for the benefit of both residents and visitors. The island's wildlife, native forests, and natural character are central to the visitor experience, and maintaining these values requires ongoing community-led conservation effort.

Funding from the Visitor Levy since October 2022 has enabled SIRCET to employ a Community Liaison who coordinates visitor engagement, environmental education, volunteer conservation activities, citizen science initiatives, and community events. The role provides visitors with meaningful opportunities to connect with the island, learn about local conservation challenges, and contribute positively during their stay.

The Community Liaison role also supports practical environmental outcomes by coordinating volunteer predator control, pest plant and weed management, litter reduction initiatives, and restoration activities that help protect the ecosystems visitors come to experience.

Without continued Visitor Levy support, SIRCET's ability to deliver these visitor-focused conservation and engagement activities would be significantly reduced, as organisational resources must prioritise core ecological restoration work. Continued funding will allow SIRCET to build on the success of the role over the past several years, expand visitor participation opportunities, and further strengthen conservation outcomes that benefit both

Page 2 of 8

**Stewart Island Visitor Levy - May 2026**  
**Stewart Island Rakiura Visitor Levy Fund application form**  
**Application No. SIVL007MAY26 From Stewart Island Rakiura Community and Environment Trust**  
 Form Submitted 8 May 2026, 12:30PM NZST

the community and visitors to Rakiura.

Please assume that we know nothing about your project - give as much information as possible.

**How will your project directly benefit visitors or mitigate the adverse environmental effects of visitors to the island? (please upload a separate sheet if necessary in the supporting documents section) \***

See word document uploaded in supporting documents

**Does your project relate to infrastructure or facility capital works?**

yes

no

No more than 1 choice may be selected.

## Presentation

Applicants can choose to make a presentation in support of their application. Presentations are limited to five minutes. An additional five minutes will be available for questions from the Stewart Island/Rakiura Visitor Levy Committee if required. Applicants will be advised of the time, date and location of presentations.

**Do you wish to make a presentation in support of my application? \***

yes

no

I am available if required by the committee

No more than 1 choice may be selected.

## Financial details

**\* indicates a required field**

### Bank details

**Bank Account \***

Account Name: Stewart Island Rakiura  
Community and  
Environment Trust

Account Number:

Must be a valid New Zealand bank account format.

**Please upload verification of organisation's bank account details \***

Filename: Deposit Slip SIRCET.pdf

File size: 180.2 kB

i.e. a bank coded deposit slip or bank verified account details

**Are you registered for GST? \***

yes

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no

No more than 1 choice may be selected.

**If yes, GST number:**

85426214

Must be a number.

**Please upload your organisations latest financial accounts \***

Filename: Tier 3 NFP Template SIRCET Accounts Year End 30 June 2025 Final signed.pdf

File size: 8.6 MB

**Please upload your organisations latest bank statement \***

Filename: 200 January 2026.pdf

File size: 401.9 kB

**Total Project Cost \***

\$87,200.00

Must be a dollar amount.

What is the total budgeted cost (dollars) of your project?

**Amount you are requesting from the Stewart Island Visitor Levy fund? \***

77200

Must be a number.

**Is this application for multi-year funding?**

yes

no

**Please indicate your current level of reserves: \***

100000

Must be a number.

**Please comment on your current level of reserves and if they cannot be used for this project, explain why: \***

Some of these reserves are held for future projects such as future translocations, investigating deer control opportunities, and a reserve fund for a replacement vehicle along with work that has been funded for the Mill Creek project and keeping our trapping effort in the areas where access is difficult for volunteers.

**Briefly describe any voluntary effort or donated materials provided for this project**

Trustees and other volunteers donate many hours of their time - 2037 hours in the 24-25year including assistance with some of the events that the Community Liaison organizes. We receive generous in-kind donations from local businesses as well.

e.g working bee by committee, number of planning hours/meetings for an event etc

**How to you envisage paying for the future operational costs of this project (if applicable)**

This project continues whilst we have funding approved - it has been operating since 2020. We continue to apply for funding from a variety of sources when available.

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### Project Budget

Applicants that are GST registered - please provide figures that **exclude** GST.  
 Applicants that are not GST registered - please provide figures that **include** GST.  
 List all the income that you plan to get towards your project (e.g. grants/donations, your own funds, fundraising). **Also include the grant amount you are requesting for this application (income and expenditure totals must match).**

Income	\$	Expenditure	\$
Nursery Donations	\$6,000.00	Wages	\$81,200.00
Other Donations	\$4,000.00	Operating Consumables	\$3,000.00
		Nursery Operating Costs	\$3,000.00

### Project Budget Totals

The income and expenditure totals should balance/match.

Total Income Amount	Total Expenditure Amount	Income - Expenditure
\$10,000.00	\$87,200.00	-\$77,200.00
This number/amount is calculated.	This number/amount is calculated.	This number/amount is calculated.

### Quotes

You should obtain at least two quotes where practicable. If this is not possible, please just explain why below.

#### Have you sought at least two quotes?

- yes  
 no

No more than 1 choice may be selected.

#### Please upload quote(s)

No files have been uploaded

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**If you have not provided more than one quote, please explain why:**

As this application is for wages, multiple quotes aren't available but we can provide historical payroll data if required.

**Additional information**

**If you have any additional comments about your budget please detail here:**

The amount we are requesting is over 2 years for this project. SIRCET is a living wage employer.

**Supporting documentation**

**Supporting documentation**

Please upload any supporting documentation here (i.e. letters of support, supplementary information from questions in the application, covering letter etc)

You may upload multiple documents.

**Attach documents here**

Filename: SIRCET Visitor Levy Funding Application May 2026.docx  
 File size: 34.0 kB

**If you have any additional comments about your application please detail here:**

SIRCET are also actively seeking funding for other aspects of our work from Environment Southland and the Murihiku Rūnaka and Rio Tinto NZAS Community Development Fund.

**Feedback**

**How did you find out about the Stewart Island Visitor Levy Fund?**

Have applied previously  Southland District Council website  Council or Community Board Facebook page  Radio  Newspaper  Online  Referred by another funder  Word of mouth  Council staff  Other

No more than 1 choice may be selected.

**PLEASE RATE THE FOLLOWING STATEMENTS**

**The time required to prepare and complete the application was reasonable**

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

**The application process is very straightforward**

Strongly agree  Agree  Disagree  Strongly disagree  N/A

No more than 1 choice may be selected.

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**Please provide any feedback or suggestions about any improvements we could make to the application process:**

It is not clear if our applications should still reference the Southland destination management strategy.

Make all boxes consistently expandable in the online form.

## Declaration

\* indicates a required field

### Declaration

I consent to the Southland District Council collecting personal details provided on this form. The consent is given in accordance with the Privacy Act 2020.

This declaration and authorisation relates to information in this application and attachments that the Southland District Council may hold about your organisation/group now or in the future.

In making this declaration I declare that:

- this application has been submitted with the full knowledge and agreement of the management/governance of my organisation/group;
- the information supplied in this application and any attachments is true and factual;
- any grant received will be used for the purpose for which it was approved.

I authorise Southland District Council to:

- use the information supplied as part of this application and any attachments for the purposes of administration and consideration of this application;
- make any enquiries of third parties, (which may involve discussing information contained in this application);
- advertise or publish the name of our organisation/group and the amount of any grant approved if this application is successful, including disclosure of this information to other funding agencies.

I acknowledge that:

- any decision made is final
- Southland District Council has the right to withdraw any grant approved or demand the return of funds already paid if it is discovered that any statement made in this application is incorrect, incomplete or misleading, in a way that may have affected the funding decision.

**I am authorised to complete this application and I have read and understood this declaration and privacy statement:**

**Name 1 \***

Shona Sangster

**Position in organisation \***

Chairperson

**Date \***

Page 7 of 8

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08/05/2026  
Must be a date.



## Stewart Island/Rakiura Visitor Levy Policy

**Group responsible:** Democracy and community

**Date approved:** 12 December 2012

**Date amended:** 17 May 2023

**File number:** R/23/4/17740

### 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

Southland District Council  
Te Rohe Pōtae o Murihiku

PO Box 903  
15 Forth Street  
Invercargill 9840

☎ 0800 732 732  
@ sdc@southlanddc.govt.nz  
🏠 southlanddc.govt.nz



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"> <li>(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</li> <li>(b) providing for revenue to be collected from the passengers; and</li> <li>(c) that has the effect of bringing passengers carried by the operator within the definition of an excluded visitor; and</li> <li>(d) including any other terms and conditions that may be agreed from time to time by the approved operator and the Council</li> </ul> <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"> <li>(a) travels to the island under a contract of carriage with an Approved Operator; or</li> <li>(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</li> <li>(c) is one whose visit is entirely within the boundaries of the Rakiura National Park; or</li> <li>(d) is visiting the island for a continuous period of 21 days or more; or</li> <li>(e) is a person under the age of 18 years on the date of arrival on the island</li> </ul>
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

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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

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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](mailto: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

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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

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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
<b>COUNCIL/COMMUNITY OWNED INFRASTRUCTURE</b>	Applications relating to Council's/the community's physical and organisational structures and facilities (e.g. buildings, jetties, tracks, power supply, WiFi installation, signage).
<b>OPERATIONAL COSTS</b>	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)



<b>COMMUNITY PROJECTS</b>	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
---------------------------	--

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
<b>COUNCIL/COMMUNITY OWNED INFRASTRUCTURE</b>	60-70% (% of the funds available annually that will be allocated to Council/community owned infrastructure)
<b>OPERATIONAL COSTS</b>	20-25% (% of the funds available annually that will be allocated to operational costs)
<b>COMMUNITY PROJECTS</b>	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
<b>COUNCIL/COMMUNITY OWNED INFRASTRUCTURE</b>	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).
<b>OPERATIONAL COSTS</b>	up to three years (the current allocation round, and the next two allocation rounds)
<b>COMMUNITY PROJECTS</b>	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.

<b>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)</b>	
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	
<b>AT LEAST ONE FORM OF IDENTIFICATION FROM CATEGORY B</b>	
<b>REASON FOR EXEMPTION</b>	<b>EXAMPLE OF ACCEPTED PROOF OF EXEMPTION</b>
<ul style="list-style-type: none"> <li>• ratepayers</li> <li>• tenants</li> <li>• residents</li> </ul>	<p>One or more of the following documents showing name and address on Stewart Island/Rakiura:</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• tenancy agreement</li> <li>• utilities bill</li> <li>• insurance renewal advice</li> <li>• motor vehicle registration</li> <li>• electoral roll number</li> <li>• mortgage documents</li> <li>• current land titles office records</li> </ul>
<ul style="list-style-type: none"> <li>• spouses of a ratepayer or tenant</li> <li>• civil union or de facto partner of a ratepayer or tenant</li> <li>• dependents of a ratepayer or tenant</li> </ul>	<ul style="list-style-type: none"> <li>• application to be made in conjunction with the respective person</li> </ul>



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



## 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.