

15 May 2026

[REDACTED]

C/- [REDACTED]

Sent via email to [REDACTED]

## **Request for Official Information LG26-0124 - Luggate Rates Increases, Wastewater Cost Allocation**

Dear [REDACTED],

Thank you for your request for information held by the Queenstown Lakes District Council (QLDC). On 24 April 2026 you requested the following information under the Local Government Official Information and Meetings Act 1987 (LGOIMA):

- 1. Rates increases and distribution of impacts. Please provide:**
  - a. The current rates modelling, schedules, spreadsheets, or working papers used to produce the Luggate examples in Council's Draft Annual Plan and FAQ material, including the example showing a rates increase of 29.3% for a connected property.
  - b. The number of Luggate residential properties, for 2025/26 and 2026/27 if available, that are:
    - connected to wastewater
    - serviceable but not connected
    - not serviceable
  - c. Any schedule, table, or spreadsheet showing the distribution of proposed 2026/27 percentage rates increases across Luggate residential properties, including the number of properties within percentage bands.
  - d. Any document, report, spreadsheet, or briefing comparing proposed rates increases for Luggate with district averages and/or with other communities.
  - e. The document or calculation showing the basis for the commonly cited 17.8% increase applying to Luggate in the previous year.
- 2. Wastewater charges and cost drivers. Please provide:**
  - a. The schedule, calculation, or working paper showing how the wastewater charge for Luggate increased from approximately \$782 to approximately \$1,757.
  - b. A breakdown of the components of that increase, including where applicable:
    - debt servicing
    - operating costs
    - renewal costs
    - deferred recovery or prior-year adjustments
    - any other relevant cost component
  - c. Any briefing, options paper, or internal report that considered phasing the increase over more than one year, smoothing the increase, or spreading costs across a wider base.
  - d. Any assessment, memo, report, or presentation addressing the affordability impact of the wastewater charge increase on Luggate households.
- 3. Development contributions from Luggate growth. For the period from 1 July 2016 to the date of this request, please provide:**

- a. The total amount of development contributions assessed, invoiced, and received from developments within Luggate.
- b. A breakdown of development contributions assessed, invoiced, and received from:
  - Luggate Park
  - Luggate Heights
  - Lake McKay Station
  - Lake McKay Terraces

For each, please break the amounts down by contribution type, including:

- water supply
  - wastewater
  - roading
  - reserves/parks
  - community infrastructure
  - any other contribution category applied
- c. The current 2025/26 per-lot development contribution rates applicable to development in the Luggate contributing area, by contribution type.
  - d. Any policy, schedule, methodology, model, or calculation used to determine the development contribution rates applying to Luggate.
4. Use of development contributions and historical funding. For the period from 1 July 2016 to the date of this request, please provide:
- a. A schedule showing how development contributions collected from Luggate Park (stage2), Luggate Heights, Lake McKay Terraces and Lake McKay Subdivision have been applied, including for each expenditure:
    - project name
    - project location
    - total project cost
    - amount funded from those development contributions
    - amount funded from other sources
    - date of expenditure or allocation
  - b. Any document showing whether development contributions collected from Luggate developments are ring-fenced for Luggate or the Upper Clutha, or instead pooled across the district.
  - c. If those development contributions are not ring-fenced, the policy, methodology, or decision record showing how Council decides where those funds are allocated geographically.
  - d. A breakdown of funding sources for Luggate water and wastewater infrastructure projects since 1 July 2016, including for each project:
    - project name
    - total cost
    - amount funded from development contributions
    - amount funded from targeted rates
    - amount funded from district-wide rates
    - amount funded from debt
    - amount funded from any other source
  - e. For the Luggate water supply upgrades referred to publicly as approximately \$6.3 million, a project-level breakdown of the total cost and funding sources.
5. Specific infrastructure serving Luggate. Please provide:

- a. The design basis, business case, or other document explaining the sizing of the water pipeline from Church Road to Harris Place, including whether it was sized for:
    - existing Luggate demand
    - future growth within Luggate
    - growth outside Luggate
  - b. The purpose, intended service area, and design capacity of the reservoir near Wānaka Airport, including any document showing whether it serves:
    - Luggate
    - Wānaka / Upper Clutha
    - wider district growth and services such as Project Pure and Wanaka Airport
6. Local investment and geographic allocation of funding. Please provide:
- a. Any report, schedule, or presentation from 1 July 2022 to date showing capital expenditure by geographic area across the district, including where available:
    - Queenstown
    - Wānaka / Upper Clutha
    - Luggate
  - b. Any report, memo, or presentation showing how Council tracks or reports the geographic allocation of rates-funded and development-contribution-funded capital expenditure.
  - c. Any document discussing whether development contributions generated by Luggate growth should be ring-fenced or prioritised for infrastructure in Luggate or the Upper Clutha.
7. Council decision-making and briefings. For the period from 1 January 2024 to the date of this request, please provide:
- a. Council workshop papers, elected member briefings, slide decks, memos, or reports that discuss:
    - Luggate rates increases
    - Luggate wastewater charges
    - development contributions from Luggate growth
    - ring-fencing or local allocation of funding
  - b. Any minutes, notes, action points, or summaries from workshops or briefings where the scale of Luggate rate increases was discussed.
  - c. Any options analysis or advice presented to councillors on alternative approaches, including:
    - phasing increases
    - wider cost sharing
    - alternative treatment of growth costs
    - local ring-fencing of development contributions
8. Water services transition / Three Waters context. Please provide:
- a. Any report, memo, presentation, or briefing addressing how Luggate water and wastewater assets, debt, revenue, and charges are expected to be treated under the transition to a new water services entity or council-controlled organisation.
  - b. Any document considering whether current increases to Luggate water or wastewater charges should be moderated, deferred, or otherwise treated differently because of the upcoming transition.
  - c. Any document addressing how current targeted charges or cost allocations for Luggate may translate into future pricing or charging under the new entity.

## QLDC RESPONSE

In response to your request, the QLDC Risk, Assurance and Finance; Property and Infrastructure; and Planning and Development Directorates were consulted.

### Decision to release information

1. Rates increases and distribution of impacts. Please provide:
  - a. The current rates modelling, schedules, spreadsheets, or working papers used to produce the Luggate examples in Council's Draft Annual Plan and FAQ material, including the example showing a rates increase of 29.3% for a connected property.

The below table details the Luggate rates line items across the 2021-2026 years, for a property connected to water and wastewater services.

Capital Value		\$ 540,000	\$ 800,000	\$ 800,000	\$ 800,000	\$ 970,000	\$ 970,000
Charge Type	Description	2021	2022	2023	2024	2025	2026
EvtChg	Recreation & Events Charge	123	132 7%	110 -17%	114 4%	126 11%	140 11%
GenResidtl	General Rate Residential	16	24 48%	23 -3%	24 3%	39 60%	11 -73%
RdgResWan	Roading Residential Wanaka	181	182 1%	188 3%	208 11%	292 41%	264 -10%
StmResWan	Stormwater Residential Wanaka	95	83 -12%	86 3%	107 25%	174 62%	239 38%
TrgAquatW	Aquatic Centre Charge Wanaka	160	154 -4%	163 6%	177 9%	206 16%	309 50%
TrgG+R	Governance & Regulatory Charge	100	124 24%	150 21%	172 15%	168 -2%	209 24%
TrgGovRes	Governance Residential	84	126 49%	138 10%	150 9%	147 -3%	212 45%
TrgRecRes	Recreation Residential	129	125 -3%	157 26%	215 37%	251 17%	285 14%
TrgRegRes	Regulatory Residential	122	122 1%	165 35%	196 19%	200 2%	230 15%
TrgSewerLu	Sewerage Luggate	800	800 0%	800 0%	900 13%	782 -13%	1,757 125%
TrgSpHaLib	Sports Halls & Libraries	410	402 -2%	468 16%	497 6%	633 27%	661 4%
TrgWatAnnL	Water Luggate Annual Charge	530	620 17%	720 16%	760 6%	870 14%	900 3%
TrgWstRes	Waste Management Charge	326	322 -1%	373 16%	386 3%	414 7%	408 -1%
UAGC	Uniform Annual General Charge	77	118 53%	187 58%	208 11%	268 29%	287 7%
<b>Total</b>		<b>3,152</b>	<b>3,334 6%</b>	<b>3,727 12%</b>	<b>4,115 10%</b>	<b>4,569 11%</b>	<b>5,911 29%</b>
Rates as % of Capital Value		0.6%	0.4%	0.5%	0.5%	0.5%	0.6%

- b. The number of Luggate residential properties, for 2025/26 and 2026/27 if available, that are:
  - connected to wastewater
  - serviceable but not connected
  - not serviceable

Please note that the following figures provided relate to properties rated for wastewater services, rather than the number of properties physically connected, serviceable, or not serviceable.

	At 1 July 2025 (25/26)	Consultation Budget Annual Plan 26/27 (to January 26)*
<b>Connected</b>	146	153
<b>Serviceable</b>	50	45
<b>Properties rated in location of Luggate</b>	Refer Council's Decision to refuse section	405

\* Final figures for 2026/27 are unavailable as rates are not yet set and the rating year is ongoing. As at January 2026, only preliminary rate-setting data exists. While the Annual Plan included dollar amounts, it did not include the number of rated properties. All released information is indicative, based on the Annual Plan, and subject to change.

- c. **Any schedule, table, or spreadsheet showing the distribution of proposed 2026/27 percentage rates increases across Luggate residential properties, including the number of properties within percentage bands.**

In our FY27 Annual Plan rate impact analysis, a total of 178 properties has been identified as Luggate residential properties. The distribution of rate increases is outlined below:

	Percentage %	Properties
Decrease	12	1
Increase	9-11	95
Increase	27-32	82

- d. **Any document, report, spreadsheet, or briefing comparing proposed rates increases for Luggate with district averages and/or with other communities.**

Council does not currently calculate averages for the district or for specific locations. Pages 24–27 of the [Draft Annual Plan \(1 July 2026 – 30 June 2027\)](#) provide a summary of indicative total rate movements (median values).

- e. **The document or calculation showing the basis for the commonly cited 17.8% increase applying to Luggate in the previous year.**

The below table details the calculation showing the basis for the commonly cited 17.8 percent increase applying to Luggate in the previous year.

Description	2024	2025	Increase	%
Recreation & Events Charge	114.00	125.98	11.98	10.5%
General Rate Residential	24.00	38.50	14.50	60.4%
Roading Residential Wanaka	208.00	292.34	84.34	40.5%
Stormwater Residential Wanaka	107.20	173.59	66.39	61.9%
Aquatic Centre Charge Wanaka	177.00	205.72	28.72	16.2%
Governance & Regulatory Charge	172.00	168.07	-3.93	-2.3%
Governance Residential	150.40	146.61	-3.79	-2.5%
Recreation Residential	215.20	250.93	35.73	16.6%
Regulatory Residential	196.00	200.34	4.34	2.2%
Sports Halls & Libraries	497.00	632.67	135.67	27.3%
Water Luggate Annual Charge	760.00	870.00	110.00	14.5%
Waste Management Charge	386.00	413.93	27.93	7.2%
Uniform Annual General Charge	208.00	268.43	60.43	29.1%
	<b>3,214.80</b>	<b>3,787.11</b>	<b>572.31</b>	<b>17.8%</b>

- 2. **Wastewater charges and cost drivers. Please provide:**
  - a. **The schedule, calculation, or working paper showing how the wastewater charge for Luggate increased from approximately \$782 to approximately \$1,757.**

The below table details the calculation showing how the wastewater charge for Luggate increased from approximately \$782 to approximately \$1,757. See Council’s response to item 2b of this request, for the components that led to the change.

Capital Value	\$ 540,000	\$ 800,000	\$ 800,000	\$ 800,000	\$ 970,000	\$ 970,000	
Charge Type	Description	2021	2022	2023	2024	2025	2026
EvtChg	Recreation & Events Charge	123	132 7%	110 -17%	114 4%	126 11%	140 11%
GenResidtl	General Rate Residential	16	24 48%	23 -3%	24 3%	39 60%	11 -73%
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Rates as % of Capital Value		0.6%	0.4%	0.5%	0.5%	0.5%	0.6%

b. A breakdown of the components of that increase, including where applicable:

- debt servicing
- operating costs
- renewal costs
- deferred recovery or prior-year adjustments
- any other relevant cost component

The below table provides a breakdown of the components of that rates increase.

	24/25 Budget Budget	24/25 Actual Actual	25/26 Budget Funded via Rates	26/27 Budget Funded via Rates
1102 - Sewerage rates	219,775	121,304	215,308	274,253
Unfunded Rates	(100,000)		(100,000)	-
<b>Rates Charged</b>	<b>119,775</b>	<b>121,304</b>	<b>115,308</b>	<b>274,253</b>
2001 - Depreciation	-	-	-	-
2030 - Amortisation - software	-	-	-	-
2312 - Insurance premiums - other	10,724	10,813	11,639	11,296
2320 - Legal fees	155	6	163	170
2330 - Electricity	9,594	11,586	10,036	12,429
2334 - Rates - council owned ORC	637	889	637	695
2335 - Rates - council owned QLDC	1,921	2,316	1,921	2,062
2461 - Sundry expenses	-	268	-	-
2469 - Technical Services	-	116	-	-
2520 - Water maintenance contract	96,144	98,379	102,226	94,966
2534 - Landfill Costs	1	-	1	0
2535 - Other Consultants	769	707	718	663
2562 - Planning Services Consultant	-	5	-	-
2568 - Network Investigations	1	28	1	-
2571 - Operations & maintenance	-	-	-	-
2800 - Interest - borrowings	71,005	67,892	65,118	121,539
3050 - Overhead allocation	28,823	27,093	22,848	30,433
<b>Total Expenses</b>	<b>219,774</b>	<b>220,098</b>	<b>215,308</b>	<b>274,253</b>
<b>Net Operating Surplus/(Deficit)</b>	<b>1</b>	<b>(98,794)</b>	<b>()</b>	<b>-</b>

## Decision to refuse information

QLDC has good reason under section 17(e) of the LGOIMA for refusing the information requested. QLDC consider it is necessary to refuse the requested information on the basis of the following grounds:

- Section 17(e) – that the document alleged to contain the information requested does not exist or, despite reasonable efforts to locate it, cannot be found.

Section 17(e) of the LGOIMA clarifies that a local authority is not required to provide information that it does not hold, or that cannot be located despite reasonable efforts. This ensures that agencies are not required to create new information in order to respond to a request.

Reasonable steps have been taken to identify any information within scope of your request, including consultation with relevant Council teams.

1. **Rates increases and distribution of impacts. Please provide:**
  - b. **The number of Luggate residential properties, for 2025/26 and 2026/27 if available, that are:**
    - **connected to wastewater**
    - **serviceable but not connected**
    - **not serviceable**

No information has been identified that specifically provides the number of Luggate residential properties for 2025/26 broken down by wastewater connection status. In particular, Council does not hold suburb-level data for rates purposes, as properties were coded by Ward only, with Luggate included within the Wānaka Ward.

2. **Wastewater charges and cost drivers. Please provide:**
  - c. **Any briefing, options paper, or internal report that considered phasing the increase over more than one year, smoothing the increase, or spreading costs across a wider base.**

No briefings, options papers, or internal reports were identified that considered phasing the increase over more than one year, smoothing the increase, or spreading costs across a wider base. Accordingly, this part of your request is refused under section 17(e) of the LGOIMA, as the information requested does not exist or cannot be found.

- d. **Any assessment, memo, report, or presentation addressing the affordability impact of the wastewater charge increase on Luggate households.**

No assessments, memos, reports, or presentations were identified that address the affordability impact of the wastewater charge increase on Luggate households. Accordingly, this part of your request is refused under section 17(e) of the LGOIMA, as the information requested does not exist or cannot be found.

As a local authority, QLDC are committed to providing access to information that it holds. However, pursuant to section 17(e) of the LGOIMA, QLDC are unable to provide the requested information because this information is not recorded or held in the format requested.

## **Right to review the above decision**

Note that you have the right to seek an investigation and review by the Ombudsman of this decision. Information about this process is available at [www.ombudsman.parliament.nz](http://www.ombudsman.parliament.nz) or freephone 0800 802 602.

If you wish to discuss this decision with QLDC, please contact [Naell.Crosby-Roe@qldc.govt.nz](mailto:Naell.Crosby-Roe@qldc.govt.nz) (Director Democracy Services).

QLDC trusts that the above information satisfactorily answers your request.

Kind regards,

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Democracy Services Team  
Corporate Services | Queenstown Lakes District Council  
P: +64 3 441 0499  
E: [informationrequest@qldc.govt.nz](mailto:informationrequest@qldc.govt.nz)