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**REPORT 3**  
*(1215/52/IM)*

## **PLIMMER BEQUEST FORWARD PROGRAMME**

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### **1. Purpose of Report**

To present a forward programme for the use of the Plimmer bequest funds over the next five years.

### **2. Executive Summary**

The aim of the forward programme for the Plimmer bequest funding is to provide a clear direction to the Committee on how to spend the Plimmer bequest funds over the next few years.

Plimmer bequest funding can only be spent on project ideas that meet the criteria of the deed. The deed specifies that the bequest is to be spent on beautifying the bays, beaches and reserves around Wellington by planting trees, shrubs and other beautification works.

In June 2001, Council approved the process for administering the Plimmer Bequest. This process involved for the first time inviting project suggestions from the public.

During the public submission process it was stated that Council would consider and decide on which projects will be funded by the Plimmer bequest over the next five years.

The amount of Plimmer funding available for expenditure at the end of 2005/06 financial year is estimated to be just under \$1.1 million. For later years the amount available will be an estimated \$300,000 per year.

In 2005, officers began the process of compiling a list of projects and assessing ideas for the use of Plimmer Bequest funds.

A successful total of 98 project ideas were received, ranging from park and beach upgrades to new infrastructural type projects.

Officers followed an assessment process which resulted in nine short listed project ideas. Further information was sort on the short listed project ideas to establish their strategic fit, project life cycle status, relationship with other Council activities and whether they maximised the use of the fund (i.e. could be used for large projects which otherwise may not have received Council funding).

After following through the selection process, there are two project ideas that can be described as the 'best fit' for Plimmer funding commencing in 2006/07. These projects ideas are Scorching Bay beautification project and Central Park Upgrade.

Both project ideas fit with the deed criteria, contribute to achieving multiple strategic outcomes, and maximise the use of the fund. These projects will have a high impact, be highly visible and are needed due to the likely increase in visitor demand.

Delivering these projects is also achievable in the next three years. Not only do they fit with, but they also complement existing council activities.

### **3. Recommendations**

It is recommended that the Committee:

1. *Receive the information.*
2. *Approve the five year forward programme tabled in the report.*
3. *Agree up to \$750,000 of the Plimmer Bequest fund be spent on the Scorching Bay Beautification project in 2006/07.*
4. *Agree that a Landscape Concept plan is prepared for the Central Park upgrade in 2006/07 and that Plimmer funding is allocated to the Central Park upgrade in 2007/08 and 2008/09.*

Note: *Officers will report back to Committee in 2006/07 on the landscape concept plan and cost estimate for Central Park upgrade.*

### **4. Background**

#### **4.1 Plimmer Bequest fund**

Charles Plimmer bequeathed the income from his residual estate to Wellington City Council for the benefit of the citizens of Wellington. This has been held in a trust fund since 1980 and is known as the Plimmer Bequest. The use of the Plimmer Bequest is governed by the terms of the Bequest of Charles Plimmer, provided in Appendix A. The Plimmer Bequest is to be spent on beautifying the bays, beaches and reserves around Wellington by planting trees and shrubs and other beautification works.

#### **4.2 The Process for selecting preferred project(s)**

In June 2001, Council approved the process for administering the Plimmer Bequest. This process involved compiling a list of project ideas from previously listed projects, requests by external parties, elected member input, officer input and suggestions invited from the public.

Once a list has been compiled then all projects are to be assessed against the Bequest Deed. Project ideas that fit with the deed criteria must:

- Be primarily aimed at beautification of a beach, recreational or picnic area, especially through tree planting
- Be one-off projects rather than on-going operational projects
- Be within the geographical 'limits' set in the bequest
- Be on publicly accessible land

It was also recommended that project ideas should seek to maximise the use of the fund, i.e. could be used for large projects which otherwise may not have received Council funding and focus on furthering Councils strategic direction.

It was also discussed that given the possible number of project ideas available for funding, those that fit best with the bequest should be given precedence.

Although the Plimmer family has no formal status in determining projects and expenditures, they are interested in the uses which the funds are applied and keen to assist in any way possible. Their preference is to see the bequest used to fund a reasonably large project that would be noticeable city wide and add something new to the city. The fund should avoid 'topping up' existing projects that have already received Council's commitment.

Once the above process has been followed then all project ideas would be assessed and a recommendation given for each project idea. Such recommendations may include, priority for Plimmer Bequest funding, recommend for inclusion in the LTCCP, remain on the list for consideration next time or project ineligible (no fit remove from the process).

### **4.3 Financial Implications**

In February 2004 the Built & Natural Environment Committee agreed that funds arising from the Plimmer Bequest be allowed to accumulate during the 2004/05 financial year. It was also noted that further advice would be provided to the appropriate committee on potential future uses of accumulated funds, and that officers will inform the Plimmer family of these decisions.

The amount of Plimmer Bequest funding available to Council at the end of the 2004/05 financial year was \$738,007. For later years the amount available will be an estimated \$300,000 per year. Funds are being accumulated during the 2005/06 financial year and the total amount available at the end of 2005/06 is estimated to be just under \$1.1 million.

### **4.3 Starting the public process for the first time**

This was the first time the Council had invited the public for ideas on how to spend the Plimmer Bequest fund. Although the public input added to the complexity of project selection, it allowed a more inclusive and transparent process to be followed.

In 2005, officers began the process of compiling a list of projects and assessing ideas for the use of the Plimmer Bequest funds over the next five years, commencing in 2006/07 financial year.

From 1 July to 5 August 2005 the public, elected members and officers had an opportunity to put forward project ideas for Plimmer Bequest funding. This opportunity was advertised in the media and signs were placed at projects recently funded by the Bequest (Oriental Bay Beach and Otari-Wilton's Bush).

Project idea submission forms were mailed to residents groups and environmental organisations. This information was also available at libraries, service centres and on the Council website. Councillors were sent submission forms and Council officers were notified of the opportunity through the Council Daily.

A successful total of 98 project ideas were received, ranging from park and beach upgrades, track improvements, and ideas for new facilities such as a new children's discovery garden, an environmental clock, sculptures, and other art works.

A full list of the project ideas received is provided in Appendix B. In order to comply with the Privacy Act, and because this process is different from the normal public submissions process, all personal details have been removed from this list.

## **5. Discussion**

### ***5.1 Eligible and Ineligible project ideas***

The first part of the assessment process was to assess if the project ideas were eligible for Plimmer Bequest funding. 55 project ideas were assessed as ineligible and 43 as eligible. These results are shown in Appendix C.

The project ideas were ineligible because they;

- did not involve a beautification of a beach, recreation or picnic area. For example, project idea focused primarily on construction of a structure, or infrastructure such as car parks, cycle ways, overhead wires, boats & rafts.
- Were on-going operational projects such as revegetation planting, weed control, or part of existing asset management programmes.
- Were on private land or the public had to pay to access the area.

### ***5.2 Eligible Projects***

The remaining 43 eligible project ideas were then clustered according to their location. For example, the seven project ideas relating to the improvement of Lyall Bay were clustered as one project. This resulted in 26 clustered project ideas, which were then scored against the following merit criteria, developed by officers to help prioritise eligible projects.

- Project furthers Council's strategic direction
- Project is compatible with zoning, reserve status & management plan
- Project is compatible with heritage and cultural values
- Project is visible (notice the difference of the development)
- Project is high profile or high impact
- Project is available for general public use
- Project is low risk ( project idea can be constructed)
- Project is innovative

- Project idea complements existing or planned provision and is additional to activities and services already provided
- Project is needed

Project ideas scored zero if they did not meet a merit criterion, one point if they partly meet a merit criterion, and two points if they fully met a merit criterion. The highest possible score was 20 points. The results of the scoring are shown in Appendix D.

### **5.3 Short listed Project ideas**

In order to prioritise project ideas for funding, it was necessary to shortlist the eligible project ideas. Project ideas were ranked according to their scores. The highest scoring nine project ideas, all scoring a total of 14 or above, were short listed.

Had the shortlist included projects ideas scoring 13 or above it would have included 16 projects. This would not be a manageable number of project ideas to assess in detail.

There were 17 project ideas that were eligible but did not make the short list. These project ideas had lower scores, particularly in the areas of visibility, level of profile, innovation, risk and project need.

The short listed project ideas are;

- Children's Discovery Garden, Wellington Botanic Garden
- Scorching Bay Upgrade
- Shorland Park Upgrade
- Central Park Upgrade
- Improving Lyall Bay Beachfront
- Cog Park/ Hataitai Beach Upgrade
- Upgrading five suburban Parks
- Organic teaching/demonstration Garden, Wellington Botanic Garden
- Owhiro Bay Quarry Carpark upgrade

All short listed project ideas fit with the Plimmer Bequest eligibility criteria. The next step is to decide which of these short listed project ideas would seek to maximise the use of the Plimmer Bequest fund (i.e. used for large projects which otherwise may not have received Council funding), and focuses on furthering Council's strategic direction.

Once the short listed project ideas were identified, further information was sought to establish their strategic fit, project life cycle status, cost estimate if known and relationship with other activities.

This information is outlined below.

**Table 1. Short listed projects – detailed evaluation**

Project idea	Description	Strategic Fit	Project stage	Cost estimate	Relationship with other activities	Maximises the use of the Plimmer fund?	Recommendation
Children's Discovery Garden	New children's garden at the Botanic garden. New & innovative regional facility for children to learn about gardening & plants	More liveable.  Not mentioned in management plan but plan does allow for demonstration gardens, education.	Idea only. Requires detailed assessment to see if feasible & what implications it if would have on service levels	Not known.  No funding has been allocated in the LTCCP	A new initiative for an environmental educator in the Botanical Gardens has been put forward for 2006/07. If approved then the educator role will have synergies with parts of this project idea	Possibly.  Although very innovative, not a high priority because requires assessment	Support new initiative for Environmental Educator role.  Measure performance & assess project idea once role is established  Stay on the list for consideration in 2009/10.
Scorching Bay upgrade	Scorching Bay beach beautification project. (includes new shade trees, planting, improved beach/ lawn integration access & picnic areas).	More liveable, Stronger Sense of Place, More eventful, Better connected, More sustainable, Safer, and Healthier	A design concept has been prepared but requires further consultation & developed design	Estimate to be up to \$750,000.  No funding has been allocated in the LTCCP	This project can be co-ordinated with the safer roads programme. (Miramar 06/07)	Yes.  This project will be highly visible to the public. It is the 2 <sup>nd</sup> most popular beach in Wellington and is used heavily for recreation & events  Council is unlikely to fund this project via other means	Project put forward for Plimmer Bequest funding in 2006/07

<p>Central Park upgrade</p>	<p><b>Upgrade &amp; restoration of Central Park ( stream beautification &amp; improved picnic areas, lighting, signs etc)</b></p>	<p><b>More liveable, Stronger Sense of Place, Better connected, More sustainable, Safer, and Healthier</b></p> <p>Consistent with the Town Belt Management Plan</p>	<p><b>This project is still in the ideas stage and will require a landscape concept plan to be prepared.</b></p>	<p><b>Estimate unknown at this stage</b></p>	<p><b>Playground refurbished in 2006.</b></p> <p><b>Renouf tennis centre indoor roof expansion in 2006.</b></p>	<p><b>Yes.</b></p> <p><b>Close to the CBD. Increase the recreation opportunities for inner city residents.</b></p> <p><b>Park has a reputation of being unsafe.</b></p> <p><b>Council is unlikely to fund this project via other means</b></p>	<p><b>Project put forward for Plimmer Bequest funding.</b></p> <p><b>Prepare concept plan in 2006/07 and implement over 2 years 2007/08 – 2008/09</b></p>
<p>Shorland Park upgrade</p>	<p><b>Refurbishment of Shorland Park environs</b></p>	<p><b>More liveable, Stronger Sense of Place, Better connected, More sustainable, Safer, and Healthier.</b></p> <p>SCMP</p>	<p><b>Concept plan prepared and Long Term Development Framework approved by SPC in Nov 2005.</b></p> <p><b>Key issue is the integration between road and park boundary.</b></p>	<p><b>Estimate for Shorland Park environs is \$996,000.</b></p> <p><b>Soft landscaping eligible for Plimmer is up to \$300,000</b></p> <p><b>Requesting \$100,000 in LTCCP 06/07 for repairs to seawall</b></p>	<p><b>Safer roads programme for Island Bay in 2006/07</b></p>	<p><b>Possibly</b></p> <p><b>Council has approved the Long Term Development Framework for Shorland Park.</b></p> <p><b>Council may contribute some funding to this project in the LTCCP.</b></p> <p><b>Condition grade of existing assets was in good condition</b></p>	<p><b>Project funded in LTCCP</b></p> <p><b>There is an opportunity to co-ordinate the safer roads programme with coastal AMP upgrades, to achieve better integration between road frontage &amp; park boundary</b></p>

<p>Lyll Bay beach improvements</p>	<p><b>Improvement ideas for Lyll bay beachfront. (dune restoration, st trees, lighting, picnic areas)</b></p>	<p><b>More liveable, Stronger Sense of Place, Better connected, More sustainable, Safer, and Healthier.</b></p> <p><b>Managed under the SCMP</b></p>	<p><b>Ideas only</b></p>	<p><b>Cost estimate unknown at this stage.</b></p> <p><b>No funding allocated in the LTCCP</b></p>	<p><b>This area has had various assets replaced and upgraded over the last few years. E.g. toilets, dune planting, seating &amp; the playground upgraded.</b></p> <p><b>A toilet needs assessment for the eastern end is currently being done in 2006.</b></p> <p><b>The option to resolve the easement over reserve land at the eastern end needs to be re-assessed</b></p> <p><b>Safer roads programme identified in 2008/09</b></p>	<p><b>Possibly.</b></p> <p><b>Although involves beautification of a beach this project idea is premature when considered against existing &amp; up &amp; coming activities. Any future work in this area needs to be considered in the wider context of eastern Wellington</b></p>	<p><b>Stay on list for consideration next time in 2009/10.</b></p> <p><b>Re-assess easement option and consider Lyll Bay in wider planning context</b></p>
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Cog Park upgrade	<b>Redevelopment of Cog Park includes relocation of clubs, new grass &amp; picnic areas, path network, new canoe launching ramp &amp; pontoon</b>	<b>More liveable, Stronger sense of Place, Safer, Healthier</b>	<b>A detailed concept plan has been prepared.</b>  <b>Approval for concept plan will be presented to SPC on 16<sup>th</sup> Feb 2006</b>	<b>This project has already been allocated funding in the LTCCP of \$1.1 Million over 3 years.</b>		<b>No.</b>  <b>Council has already approved funding for this project or part of it in the LTCCP.</b>	<b>Project continues to be funded out of the LTCCP of \$1.1 million over three years</b>
Owhiro Bay Quarry entrance upgrade	<b>Upgrade the Quarry entrance ( planting, access, picnic area, signage kiosk )</b>	<b>More liveable, Stronger sense of Place, Better connected Safer, Healthier</b>	<b>A design brief &amp; preliminary concept sketch has been approved.</b>  <b>Consultation o section sale and developed design progressing</b>	<b>\$700,000</b>  <b>Components eligible for Plimmer are estimated up to \$300,000</b>  <b>SPC approved that this project be considered in the LTCCP in 2006/07</b>		<b>No.</b>  <b>Council has already approved this project to be included in LTCCP for 2006/07</b>	<b>Project is funded through the LTCCP in 2006/07</b>

Upgrading five suburban parks	<p><b>A previously suggested project. Involves selecting &amp; upgrading 5 suburban parks geographically spread across the city</b></p>	<p><b>More liveable and Stronger sense of place</b></p>	<p><b>This project idea is still very general and requires further planning. The five parks still need to be selected.</b></p>	<p><b>1999 report estimated it to cost \$500,000 per park</b></p> <p><b>Total \$2.5 million</b></p>	<p><b>A planning study is scheduled in 2006/07 that will identify &amp; put community neighbourhood park upgrades in a priority programme</b></p>	<p><b>Possibly requires further detailed planning</b></p>	<p><b>Officers undertake further detailed planning.</b></p> <p><b>Project idea stays on the list for consideration 2009/10</b></p>
Organic teaching/ demo garden	<p><b>New organic teaching garden at the Botanic Garden</b></p>	<p><b>More liveable, More sustainable, Healthier</b></p>	<p><b>Only an idea. Requires further assessment</b></p>	<p><b>Not known.</b></p> <p><b>No funding has been allocated in the LTCCP</b></p>	<p><b>A new initiative for an environmental educator in the Botanical Gardens has been put forward for 2006/07. If approved then the educator role will have some synergies with parts of this project idea</b></p>	<p><b>Possibly.</b></p> <p><b>Although very innovative, not a high priority. Requires assessment.</b></p> <p><b>New garden will have an impact on service levels</b></p>	<p><b>Support new initiative for Environmental Educator role.</b></p> <p><b>Measure performance &amp; assess project idea once role is established</b></p> <p><b>Stay on the list for consideration in 2009/10.</b></p> <p><b>There is an opportunity to consider assessing this project idea with the Children's Discovery Garden project idea.</b></p>

## **5.4 Recommended forward programme**

The aim of the forward programme is to provide Committee with a clear direction on how to spend the Plimmer Bequest funds in the next few years.

During the public submission process it was stated that Council would consider and decide on which projects will be funded by the Plimmer bequest over the next five years.

After following through the selection process, there are two project ideas that can be described as the 'best fit' for Plimmer funding commencing in 2006/07. These projects ideas are Scorching Bay beautification project and Central Park Upgrade.

Both project ideas fit with the deed criteria, contribute to achieving multiple strategic outcomes, and maximise the use of the fund. These projects will have a high impact, be highly visible and are needed due to the increase in visitor demand.

Delivering these projects is also achievable in the next three years. Not only do they fit with, but they also complement existing council activities.

### **Scorching Bay Beautification Project**

The Scorching Bay beautification project will improve the visitor experience and allow the area to accommodate for the increasing demand in a more sustainable way.

Scorching Bay is the second most popular beach in Wellington City. Its location and south east aspect makes it a very safe and sheltered beach, ideal for families, school groups and multi- sport events. When Wellington's prevailing Northwest wind or southerly is blowing, Scorching Bay can remain relatively calm and sheltered.

The Bay's character and sense of place allows it to be used for a wide variety of recreational activities and events, ranging from wedding ceremonies, to casual picnicking, discovering the rock pools to diving. Its unique lawn-beach interface attracts an increasing number of triathlons and multi- sports events, especially as more and more people are participating or having a go in such events. (Examples include the SHE women's triathlon series and our own award winning ZM Run Swim series).

The beautification project will create an opportunity to improve and sustain this important natural recreational venue for the city. The beautification project will enhance the beach- lawn interface, ensure more shade trees and planting, create new picnic and seating areas and encourage better and safer pedestrian linkages.

Given the defined scope and area of the Scorching Bay beautification project, it is possible that this project can be delivered within the next financial year.

### **Central Park upgrade**

Central Park is part of the Wellington Town Belt but can also be described as a city park in close proximity to the Central Business District. It has much to offer with its formal

gardens, stream environment, its mixed woodland with seasonal interest, a large playground/picnic area, and a network of walking tracks, including a section of the City to Sea walkway.

The Town Belt Management Plan states that Central Park is something of a forgotten asset and there is a need to comprehensively assess the recreational potential of the park with a view to encourage greater use. Central Park over recent years has also developed a reputation of being an unsafe and undesirable area of public space.

There is an increasing demand for high density dwellings in Wellington City over the next 10 years. As high-density dwellings have very limited or no private open space there will be an increase in the demand on high quality public open space.

It is therefore important that areas like Central Park are upgraded so their true potential can be utilised.

The Central Park upgrade project idea is still in the ideas stage. The project scope needs to be defined and a landscape concept plan prepared. If the Committee approves this project idea to be funded out of the Plimmer Bequest, then this planning work can be done in the next financial year 2006/07, with the expectation that the upgrade will be implemented in 2007/08 and 2008/09. Given the likely amount of tree and amenity planting work it is advisable to stage implementation over two years.

Due to the nature of the Plimmer bequest fund and the selection framework, the term of the forward programme can be established to suit the preferred project ideas. It is also advisable to have some level of flexibility in later years of the forward programme to consider any change in strategic priorities.

The recommended five year forward programme is shown in tabular form below.

**Table 2. Recommended 5 year forward programme**

	06/07	07/08	08/09	09/10	10/11
<b>Amount in Plimmer Fund</b>	\$1.1 million	\$650,000	\$300,000	\$300,000	\$300,000
<b>Projects</b>	Scorching Bay upgrade up to \$750k				
	Prepare landscape concept plan & cost estimate for Central Park & report back to SPC	Central Park Stage 1.	Central Park Stage 2.		
	A planning study is scheduled in 2006/07 that will identify & put community neighbourhood park upgrades in a priority programme. This will consider the project idea of upgrading the 5 suburban parks geographically spread across the city.				
	If NI is approved, then the new environmental educator role in the Bot Gardens will be established.	Undertake an assessment of the Children's discovery garden and organic teaching garden, especially in context of adding an extra teaching resource for the educator role.			
		Consider future work at Lyall Bay in wider planning context for eastern Wellington.. Re-assess option for easement			
			Report to Committee the next potential project to be funded by Plimmer Bequest in 09/10 & 10/11. Projects ideas to remain on the list include; <ul style="list-style-type: none"> <li>• Upgrade of 5 Suburban parks</li> <li>• Lyall beach improvements</li> <li>• New demo gardens in Bot Gardens.</li> <li>• Consideration may also be given to other projects.</li> </ul>	Stage 1 of either; <ul style="list-style-type: none"> <li>• Upgrade of 5 Suburban parks</li> <li>• Lyall beach improvements</li> <li>• New demo gardens in Bot Gardens.</li> <li>• Consideration may also be given to other projects.</li> </ul>	Stage 2 of either; <ul style="list-style-type: none"> <li>• Upgrade of 5 Suburban parks</li> <li>• Lyall beach improvements</li> <li>• New demo gardens in Bot Gardens.</li> <li>• Consideration may also be given to other projects.</li> </ul>

## **6. Conclusion**

Given the terms of the Bequest deed, there will also be an element of interpretation and judgement in deciding how the funds are spent. Officers believe that they have followed a consistent and transparent selection process.

The recommended five year forward programme provides the Committee with a clear direction on how to spend the Plimmer bequest funds over the next three years but has allowed a level of flexibility in later years.

The two projects ideas that have been recommended are the best fit with the bequest deed, add to furthering Council's strategic outcomes, complement existing council activities and are greatly needed.

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## **Supporting Information**

### **1) Strategic Fit / Strategic Outcome**

The process for selecting projects that can be funded by the Plimmer Bequest has considered strategic fit and outcomes. The short listed projects were assessed on their strategic fit and whether they fitted with single or multiple outcomes.

### **2) LTCCP/Annual Plan reference and long term financial impact**

The Plimmer bequest fund is from the Charles Plimmer Estate Trust. The projects approved for Plimmer funding will have to be identified in the Annual Plan 2006/07.

### **3) Treaty of Waitangi considerations**

All Treaty of Waitangi considerations have been taken into account during the selection process.

### **4) Decision-Making**

A transparent decision making process has been followed. Given the nature of the bequest deed, there has been a level of officer judgement and professional opinion.

### **5) Consultation**

#### **a) General Consultation**

A public consultation/ submission process was followed, where the public had an opportunity to submit possible project ideas.

Officers have briefed the Plimmer family of the process followed and projects being recommended.

#### **b) Consultation with Maori**

No specific consultation with Maori has occurred to date, but if the recommended projects are approved then consultation with Maori will occur on specific project designs.

### **6) Legal Implications**

Council's lawyers have been consulted during the development of this report. We can only approve projects that fit within the criteria of the Plimmer bequest deed.

### **7) Consistency with existing policy**

The process considered assessing project ideas against existing policy and management plans