

2021-2022

Annual Report



Contents

- Cover
- 1. Table of contents
- 2. Notice of meeting
- 3. Aims and Objectives
- 4. OPT financial performance summary
- 5. Royal Albatross Centre (RAC)
- 6. Royal Albatross Centre Continued
- 7. RAC Gift Shop
- 8. Toroa Cafe RAC
- 9. Pukekura Trust
- 10 - 12. OPT Education
- 13 - 15. OPT Charitable contributions
- 16. Glenfalloch Garden
- 17 -19. Glenfalloch Restaurant
- 20. Accommodation
- 21. Fletcher House
- 22. Summary audited financial Report
- 23. Chairman's message
- 24. Record of Appreciation
- 25. Directory

Notice of Meeting

Members of the Otago Peninsula Trust are advised that the 56th Annual Meeting will be held at 5.00pm on Wednesday 29th March 2023 at Glenfalloch.

All Members are entitled to attend and vote.

Business:

1. Confirmation of minutes from the 55th Annual Meeting on 30th March 2022.
2. To receive, consider and adopt the CEO and Chairman's Annual Report and the Financial Statements for the twelve months ending 30th September 2022
3. To elect to the Board of Trustees for the following year. Mr Warren Moffat and Mr Greg Verheof retire by rotation and both offer themselves for re-election. No other nominations have been received.
4. To record the appointment of Auditors and empower the Trustees to fix their remuneration.
5. To consider any other matters which may properly be brought to the meeting.



Aims and Objectives

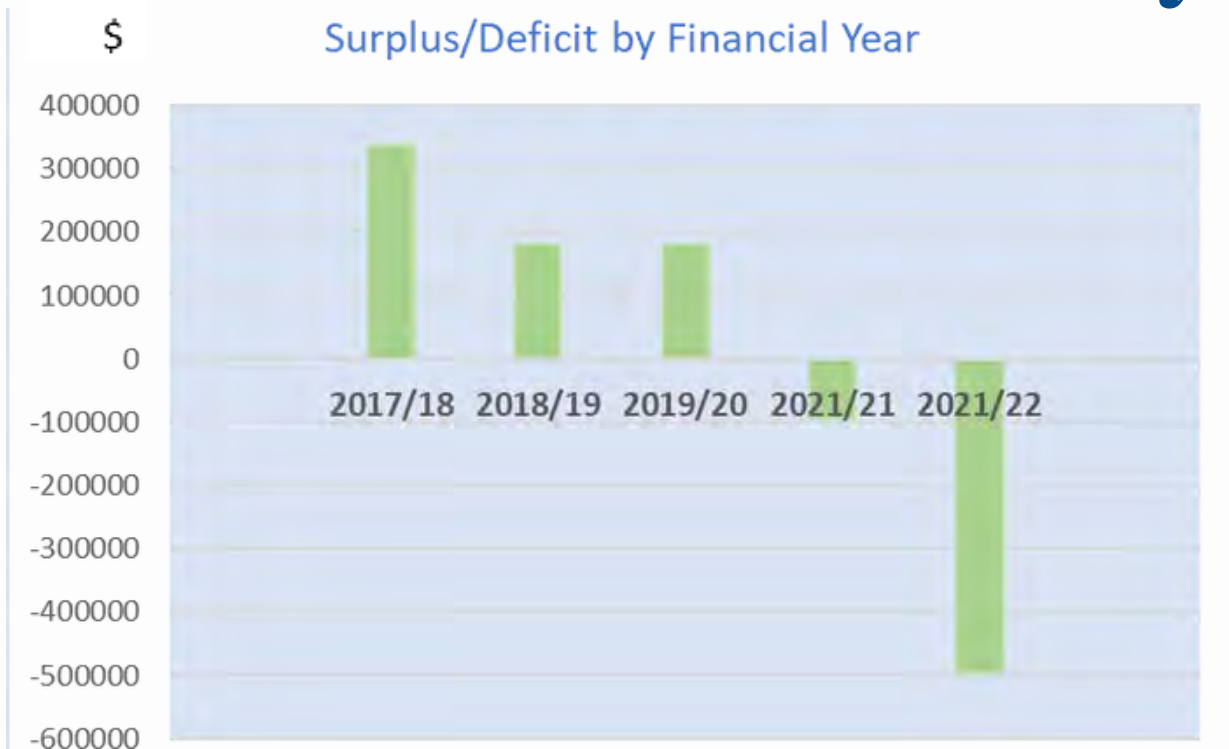
The stimulation of public interest in, and care for, the beauty, history, and character of the Otago Peninsula.

The preservation of the natural attractions of the Otago Peninsula and protection of its flora and fauna.

The development of tourist attractions, public and recreational services on the Otago Peninsula so that the public may obtain the maximum use and enjoyment of the area in a way that will not detract from or destroy its beauty or character.



OPT Financial Performance Summary



The Trust recorded a deficit of \$495,570 for the year ended 2022. This compares to a deficit of \$96,654 for the year ended 2021. The 2022 year ended financial performance was again materially affected by Covid, business restrictions, and the effect on staffing due to illness and isolation protocols. Having no international visitors for the entire high season resulted in a significant reduction in revenue across all areas. The graph above shows a four-year comparison of the Trusts surplus/deficit and gives a graphic indication of how severely our

businesses were affected by Covid. The board and management made every effort to minimize the cost base, and Trustees supported management's recommendation to keep trading rather than hibernating to help other operators and hold onto skilled staff, aiming to be in the best position possible when the borders reopened. To help fund deficits, the Trust borrowed money under the Strategic Asset Protection Programme. On a positive note, we can report that 2022/2023 is tracking in a much more positive direction.

Royal Albatross Centre, Pukekura (Taiaroa Head)



Wildlife, and specifically the Royal Albatross are doing very well at Pukekura. With numbers of Albatross seen on an annual basis are continuing to grow. This means that throughout the year, with the higher numbers of nests, we are seeing exceptional flying on most tours, wowing both staff and visitors. The Red Billed Gull Colony at Pukekura also continues to grow, with increasing numbers of nests every year. All 12 seabird species on the headland are doing well. A clear indication that all things natural are thriving at Pukekura. The opportunities to view Albatross continued to improve, breeding started with 36 breeding pairs and 36 eggs laid of which 3 were broken, 1 was infertile and 5 suffered embryo death. The resulting 27 eggs that hatched, was a 75% hatching success. Sadly one chick died at hatching due to yolk infection and another as a young chick, but the remaining 25 were able to successfully fledge at the end of the season.

The toroa/northern royal albatross chick that featured on this season's Royal Cam livestream was named 'Lilibet' to acknowledge the passing of Queen Elizabeth II. Lilibet, was also the first chick to fledge from the Pukekura/Taiaroa Head colony, taking flight on 3 September, beginning a huge global journey that will take her tens of thousands of kilometers over the next 5 years.

Royal Albatross Centre, Pukekura (Taiaroa Head) continued...

This year was our 2nd financial year affected by the COVID pandemic, significantly impacting visitor numbers at the Royal Albatross Centre (RAC). The Trust was fortunate to have received funding under the Strategic Tourism Asset Protect Programme in 2021, which along with the Covid wage subsidies, was a lifeline. With the support of the trustees and support from other local tourism operators, we continued to keep its doors open. The reopening of the New Zealand borders in July 2022 has been followed by a slow and steady recovery of tourist numbers and financial well-being.

Total tour income for the Royal Albatross Centre was \$420,586., against \$583,437. the previous year, with revenue from the shop at \$224,420. (\$230,809. last year) and the Café at \$182,734. (\$224,579. last year) respectively. Education Income dropped to \$15,808. against (\$25,669. last year) due to the Trusts Ministry of Education LOETC funding not being renewed. The onsite school programmes at the Royal Albatross Centre remain one of the core means of meeting the educational objectives of the Trust and will continue to be delivered. The team will continue to look at alternative funding avenues.

During this season, the Royal Albatross Centre achieved the Gold standard from Qualmark Sustainable Tourism. This accolade is attributed to the diligence and commitment undertaken by the centre's staff over many years.

The Royal Albatross Centre has remained committed to supporting the health and well-being of our staff, maintaining our commitment to being a "Living Wage" employer and introducing staff carpooling payments or providing transport to and from RAC.

Royal Albatross Centre, Gift Shop



The 21-22 season was a challenging year from a financial point of view, but felt like a positive year given that the international borders were closed for the majority of the time. At the Centre we were very fortunate to have the support of Kiwis, and later in 2022 our Aussie friends! Mel McCosh our manager continued to focus on buying and supporting NZ made, which was well received by our visitors. The online shop proved to be popular, and it was heart-warming to see the team bundling up parcels for albatross fans from across the globe! Whilst the online shop was popular, staff continued to build a presence with social media, gaining followers and sharing the message of being an eco-friendly gift shop and part of a conservation trust. A gift shop with a difference! The team look forward to welcoming back international visitors in the 22-23 season and continuing to offer a wide range of NZ themed gifts and albatross souvenirs.



Toroa Cafe

RAC



The Toroa Cafe was another part of the business hard hit by the reduction in International visitors, The team worked hard focusing on attracting the local market and looking after the domestic visitors from around New Zealand. The focus in the food was good old favourites, like a Sunday Roast, Fish of the Day and tasty cabinet items. Cheese rolls proved to be a favourite and the Team were packaging them up to sell by the dozen. A real treat for the North Island travelers who tried the mainland goody.

Coffee provided by local company Common Ground is a highlight, with many commenting that it was the best they had.

The biggest highlight has been the progress toward becoming a plastic free, disposable cup free café. The introduction of milk on tap, saving hundreds of plastic milk bottles from the landfills and the removal of gladwrap, sugar sachets, plastic table numbers, paper and plastic straws all contribute to our green objectives. A main distributors Bidfood has also stopped sending us products in single use plastic bags.



Pukekura Trust, Blue Penguins Pukekura

Blue Penguins Pukekura , the tourism operation run by Pukekura Trust a 50/50 joint venture partnership between the Otago Peninsula Trust and the Korako Karetai Trust was put into hibernation in July 2021. The operation was relaunched initially only 3 days a week in January 2022.

The relaunch happened under a changed management structure, with the Pukekura Trust employing a dedicated Operations Manager in place of the management contract with Otago Peninsula Trust. The scientist position was not continued post hibernation, which also suspended the RFID tracking project.

Closing because of Covid gave the Pukekura Trust a chance to relaunch the tour with a stronger cultural focus. The new look tour also includes a walk into the reserve (prior to the birds arrival) so that guests can see the kaitiaki work that the Pukekura Trust is achieving within this reserve. Tours 3 days a week continued until September 2022 , so with either hibernation and limited opening hours, for the entire financial year, the sales income was significantly impacted. The revenue from tour income was \$74,415, compared to \$ 108,025 in 2020/21 and \$380,647 2019/20 pre covid.



OPT Education Programme

The Otago Peninsula Trust's education programme enriches local curriculum of southern NZ schools. From fortification to conservation, the change in use of the site over time provides the programme with both science and social science perspectives. Pukekura / Taiaroa Head, a site of cultural importance to Kai Tahu, provides opportunities for students to learn about the local history, gain first-hand experience with the native wildlife and associated habitats, participate in environmental action and contribute to the plight of threatened species. Curriculum-based programmes - Delivering Learning Experiences Outside the Classroom

(Ministry of Education LEOTC contract) for primary and secondary schools at the Royal Albatross Centre, provides authentic hands-on learning in a range of curriculum areas (<https://albatross.org.nz/education/>). In the last year (July 1, 2021 to June 30, 2022) over 1258 school students from 41 primary and 10 secondary schools took part in the education programme, an excellent result considering the ongoing disruptions due to Covid 19. The education team were innovative in their delivery through development of on-line programmes, educational resources and programmes run in the classroom and school yard.



OPT Education Programme continued..

Engaging in community action – the education programme extended beyond Taiaroa Head this year. Thanks to the support from the Otago Participatory Science Platform, a project to increase public awareness and understanding about red-billed gulls was delivered. The aim of the project was to involve the wider community in caring for and gathering data that can help inform better management for this native species. Asking the public for information about where red-billed gulls were nesting sites proved to be very advantageous. The Great Otago Gull Count, run during Seaweeek (March 2022,) was an excellent opportunity for schools to do science in the school yard. Many schools (>35) and students (~400), from Takakopa to Oamaru participated and submitted data. Schools were encouraged to review their own data with the students and think about why the gulls are attracted (or not) to their school yard and what actions they can take to learn more about the gulls and reduce the negative interactions with people. Students then designed posters for the “Don’t feed the gulls” campaign. The best designs have been turned into stickers to be placed on rubbish bins at schools and around the wider community.

Dunedin and Oamaru are hot spots for seabirds, and home to a rapid increase in red- billed gulls. This trend reflects an increase throughout Otago but is in marked contrast to a national decline. During talks given by Dr Chris Lalas and Sally Carson in Oamaru (Feb 22) and Dunedin (March 7) discussion focused on how the close proximity of gulls and people has led to conflicts of interest. This project has supported schools to investigate this issue and design innovative solutions. Educational resources were developed for schools, including a guide to the gulls in NZ (<https://albatross.org.nz/education/educational-resources/>). Two teacher workshops and multiple schools programmes were delivered in Oamaru and Dunedin. Nine media articles were written about the project including one about the student efforts to design methods to deter gulls

OPT Education Programme continued..

(<https://www.odt.co.nz/regions/north-otago/robotic-creations-pupils%E2%80%99-solution-buildings%E2%80%99-gull-problems>). Many of the results have been documents in the publication by Lalas, Carson and Perriman (2022).



“This was an amazing opportunity for our students to find out more about the issue of the Red Gulls. They used this information for an internal assessment task. It is also highly relevant to our local community. Student results in this assessment speak for themselves, engagement and understanding was high, meaning they all got their best results in NCEA Y12 to date.”

The Education Programme continues to raise awareness and knowledge of the natural and cultural attractions of Pukekura and the greater Otago Peninsula and aid their conservation and preservation.



OPT Charitable contributions Complimenting Aims and Objectives

Predator Free Dunedin - The Predator Free Dunedin (PFD) Trust was established in 2017 of which the Otago Peninsula Trust is a founding member. As a recipient of Predator Free 2050 Ltd funding, they work alongside their delivery partners, Landscape Connections Trust, City Sanctuary, and the Otago Peninsula Biodiversity Trust, to meet the community's aspirations of being predator free. The Otago Peninsula at the writing of this report had benefited from the removal of over 22,500 possums, the present focus on possums between Portobello and the city, will directly benefit Glenfalloch Gardens.

Volunteering - The Royal Albatross Centre partners with the Department of Conservation, in supporting the husbandry of the Northern Royal Albatross at Pukekura (Taiaroa Head). All staff are willing and excited to be able to assist with the supplementary feeding and the opportunity that this provides to get up and personal with the Albatross.

Supplementary Feeding BMT@DG, the orphaned chick, fledged at 244 days! That is just 4 days longer than average. This chick required over 100 supplementary feeds, with OPT staff assisting DoC staff with most of these. His biological parents abandoned the nest during hatching so he was initially fostered as a newly hatched chick. They did a good job of chick raising in the first month, being young birds themselves. But the proudest parents of all, were the staff of the Department of Conservation and Royal Albatross Centre. We are looking forward to an Alan Wright moment in the future when this bird returns.

OPT Charitable contributions continued.. Complimenting Aims and Objectives

Community - The Trust has continued to work with the local Marae at Ōtākou to ensure that we can meet their needs when they are hosting visitors to the marae. We have been able to organise tours and hosting services sometimes outside of our normal operations. Wherever possible if an individual identifies themselves as a member of Te Rūnaka o Ōtākou, or member of the Korako Karetai Whanau, we will always do our best to place them on tours at no charge. We encourage advanced reservations to ensure this is possible.

Otago Peninsula Trust staff often undertake speaking engagements and contribute to forums that have relevance to the Trust's objectives, across wider Dunedin.

Wild Dunedin Festival - The OPT are founding members and Trustees of the Wild Dunedin Festival. The 7th festival was to be held in April of 2022, one of very few events, that was able to proceed under the continued restrictions of COVID, we are looking forward to the 2023 Festival that always includes Earth Day. This event has been and continues to do a fantastic job to profile Dunedin as the Wild Life Capital of New Zealand.



Friends of the Garden

The long established Friends of Glenfalloch Garden continue to volunteer their time on a monthly basis, some members are so keen they turn up many more days. A huge thank you to the wonderful team. Here are some lovely photos of them at work.

Anyone interested in joining the friendly working bees, we would love to have you.



Glenfalloch Garden

Gardens don't stop for Covid.

2021/2022 was another busy year in the garden. Gardens the size of Glenfalloch require a lot of labour to keep them going. For the last part of the year the team were lucky to have the services of David from RAC for a few hours a week. This has helped with some of the labour-intensive jobs.

The 'Friends of the Garden' have continued helping with maintenance, giving particular attention to the Rose garden. SWAT (spot weeds and terminate) have helped us in the Upper Gardens. They have spent a number of days controlling Banana passionfruit

The vegetable gardens have been producing well and the restaurant is making the most of the constant supply. We are slowly increasing the size of them and increasing the variety of what we are growing. Due to the high level of uncertainty over the numbers of people being able to gather in one place for events, the Night Garden was postponed for another year. The call was made early in the year before too much time and money was spent on it. It was unfortunate but for the Night Garden to be successful visitor numbers need to be large each night.



Glenfalloch Restaurants

Most of 2021/2022 was challenging for hospitality businesses everywhere, and Glenfalloch Restaurant was no exception. Navigating limitations on numbers, vaccine passes, and mask wearing was part of that challenge. The Glenfalloch team adapted quickly and made the most of the situation. The annual sales of \$695,884 was 49% up on the previous year, but difficult to use as a comparison given the periods of lockdown etc. The team did a fantastic job, often working understaffed and under pressure. A huge Thank you!

Growing produce on site was a focus, which our Chef and garden staff embraced. The resulting bounty of fresh fruit and vegetables is used as a drawcard on our menu.



Weddings and events



Weddings and Events have always been a focus at Glenfalloch, but these dropped off significantly due to Covid. Things started to pick up early 2022, and we changed the staff structure to introduce two dedicated Wedding coordinator roles, with the aim of growing this area of business for the future and to create Glenfalloch a recognized venue of excellence. Bookings have been strong.



“

"Heartfelt thanks for such a wonderful day. The food was just perfect, and we have had lots of compliments about it. All the staff were so on-the-ball and helpful all day. Everything ran so smoothly. Thanks a Million.

Evelyn & Diana



Accommodation at 433



The house the Trust owns at 433 Portobello Road had another good year. Air B'n'B started picking up in January 2022. Having the house as an accommodation option for wedding parties or their guests is a real asset to have for the Glenfalloch wedding business. The listing on Air BnB notes that we maintained SuperHost status and some fantastic reviews have been posted.

"Stop looking and just say yes to this amazing space! Truly beautiful house, surrounded by amazing garden and a beautiful view of the bay.

We loved our stay here. It's perfectly located for getting to town quickly, or out to explore the peninsula. Literally go down the driveway and cross into the Glenfalloch grounds with access to cafe, restaurant, and amazing walking gardens.

Thank you to the Otago Peninsula Trust team for being there for every little thing that was asked. You all are amazing!" Jared June 2022 .



Fletcher House



Otago Peninsula Trust continues to manage Broad Bays Historic Edwardian Villa called 'Fletcher House' on behalf of the Fletcher Trust. Built in 1909 by Sir James Fletcher, the house was a family home until 1990, when it was purchased and restored by the Fletcher Challenge Trust as a tribute to Sir James. The house is currently open for guided tours 11am to 4pm on weekends and Public Holidays .

Covid and the realignment of Portobello Road both impacted on visitor numbers for the 2021/22 financial year.

Work continued on maintenance of the gardens and some of the internal window treatments were replaced with fabrics sympathetic to the era of the home.

Visitor numbers were lower than hoped, but there was excellent feedback from the domestic visitors that did take a tour.



FLETCHER HOUSE

Chairman's Message

On behalf of the Otago Peninsula Trust Trustees and senior management, we are pleased to present the Trust's Annual Report for the financial year ending 30th September 2022.

2021-22 was a challenging year financially, but as you will see throughout this report, there were also a number of highlights. The year started managing disruptions to business and dealing with what had become our team's new normal, dealing with the implications of the Covid pandemic day to day. There was some light at the end of the tunnel by late February/March when the borders reopened to vaccinated visitors from Australia. It took until October 2022 to fully reopen to the world. Our staff were amazing, working under pressure because of staffing shortages due to sickness and isolation requirements. I appreciated the staff's flexibility and their willingness to work from home where they could to help keep the businesses going. Our staff and volunteers are the strength of the organisation and deserve a big Thank you! I want to acknowledge the significant contribution of our senior management team. They have maintained a very positive



Ross Smith Chairperson

“can do” attitude during a difficult period in the Trust's history.

They have always believed that the Trust would survive the impact of Covid and would emerge a stronger and more flexible organisation. This has proved to be the case as we rapidly rebuild on the growing tourist sector at the Royal Albatross Centre and the restaurant and weddings events at Glenfalloch.

I also want to acknowledge the significant contribution of my fellow Trustees. The mixture of skill, experience and sound governance has helped ensure the Trust has a bright, positive outlook which will allow us to meet the Trust's objectives into the future.



Otago Peninsula Trust
Summary Financial Report for the year ending 30 September 2022

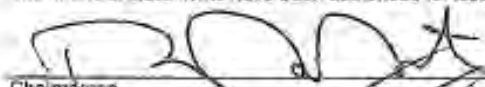
Statement of Comprehensive Revenue and Expense for the year ended 30 September 2022	2022	2021
Revenue from Exchange Transactions	2,047,884	2,530,663
Revenue from Non-Exchange Transactions	8,646	22,830
Less Total Expenses	2,500,959	2,570,853
Plus Net Finance Income / (Expense)	1,313	202
Operating Surplus / (Deficit)	(442,118)	(17,258)
Plus Share of Surplus / (Deficit) of Associate Accounted for Using the Equity Method - Pukokura Trust	(53,455)	(75,369)
Plus Share of Surplus / (Deficit) of Associate Accounted for Using the Equity Method - Glenaloch Catering LP	0	(4,028)
Plus Other Gains / (Losses)	-	-
Surplus / (Deficit) for the year	(495,570)	(96,654)
Other Comprehensive Revenue and Expenses	-	-
Total Comprehensive Revenue and Expenses for the Year	(495,570)	(96,654)

Statement of Financial Position as at 30 September 2022	2022	2021
Assets		
Current Assets	481,298	735,626
Non-Current Assets	2,289,732	2,503,499
Total Assets	3,131,028	3,239,325
Less Liabilities		
Current Liabilities	481,956	454,683
Non-Current Liabilities	700,000	350,000
Total Current Liabilities	1,191,956	804,683
Net Assets	1,939,072	2,434,642
Equity		
Accumulated Funds	1,939,072	2,434,642
Total Equity	1,939,072	2,434,642

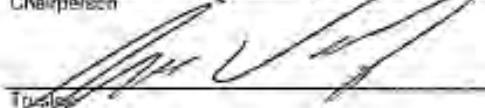
Statement of Changes in Net Assets for the year ended 30 September 2022	2022	2021
Balance at start of period	2,434,642	2,531,297
Surplus / (Deficit) for the year	(495,570)	(96,654)
Other comprehensive revenue and expenses	-	-
	1,939,072	2,434,642

Statement of Cash Flows for the year ended 30 September 2022	2022	2021
Net Cash from / (used in) operating activities	(186,518)	(136,760)
Net Cash from / (used in) investing activities	15,092	(69,180)
Net Cash from / (used in) financing activities	350,000	350,000
Net increase / (decrease) in cash and cash equivalents	178,574	142,050
Cash and cash equivalents, beginning of the year	536,219	394,169
Cash and cash equivalents at end of the year	714,793	536,219

The financial statements have been authorised for issue by the trustees by:



 Chairperson



 Trustee

29/3/23
 Date

29/3/23
 Date



Record of Appreciation

- Department of Conservation 'Te Papa Aatawhai'
- Members of the Education Advisory Board
- Otago Peninsula Community Board
- Otago Polytechnic 'Te Pukenga'
- University of Otago 'Te Whare Wānanga o Ōtākou'
- Otago Biodiversity Group
- Val Braumann
- A J Huddy Trust
- Fletcher Trust
- Otago Community Trust
- Korako Karetai Trust
- Te Runaka o Ōtākou
- Te Poāri a Pukekura
- Otago Participatory Science Platform
- Friends of Glenfalloch Gardens
- Aotea Road
- Tumbleweed
- Donations - we are so grateful to all the individuals who contributed, often anonymously

Directory

Trustees / Patron

Mr William Dawson	Patron
Mr Ross Smith	Chairperson
Mr Warren Moffat	
Mr Greg Verhoef	
Mrs Judy Bell	
Mr Howard Broad	Deputy Chairperson

Senior Management

Mrs Robyn McDonald	Chief Executive Officer
Mr Hoani Langsbury	Manager Royal Albatross Centre
Mrs Sandra Walker	Administration Manager
Chris McCormack	Operations Manager RAC - resigned July 22
Mr Leon Chu	Operations Manager RAC (From July)

Accountants

- Inhouse
- Deloitte

Auditor

- Crowe
an

Solicitors

- Anderson Lloyd Lawyers
- Chen Palmer

Bank

- Westpac

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