

Final report

Feasibility Study of Livestock Advisor Cooperative Model

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Abstract

MLA wishes to explore how it could support a cooperative or similar collaborative model that could support emerging livestock advisors to build their expertise, networks and client base, while accessing business support. The overall objective for the project was to determine if a livestock advisor cooperative (or similar) model would be feasible for the red meat industry, identifying the potential scale of the market, income potential, and resources and investment required.

This study utilised desktop analysis to identify gaps in service delivery for red meat producers, identified support and information needs of advisors through a survey and focus groups, and proposed a model which builds upon existing successful advisor networking groups, for consideration by MLA and advisors working within the red meat sector.

Examination of existing successful models as well as the survey and focus group responses identified that a potential collaborative organisation for advisors needs to be independent, member-driven, reputable and based on trust.

A relatively high degree of market penetration (circa 30% of the identified national advisor population) is required to ensure viability for a multi-region tiered membership model offering enhanced service provision and collaboration opportunities, built on a common base of networking events and professional development. Regional networking organisations involving a smaller pool of participants with greater voluntary input offer a feasible alternative to a commercial tiered membership model, in certain regions with distinct operating and industry environments.

These approaches have the potential to develop and operate in parallel, and if they can be established and implemented, the skills base available to the red meat sector is likely to be preserved and enhanced.

The interest from advisors in developing and maintaining a network of peers was resounding, and the opportunity for increased networking, industry level mentoring and peer to peer learning needs further attention. It is strongly recommended that MLA, potentially working with other RDC's, continues to explore options to expand the existing Livestock Advisor Network, drive engagement with participants in capacity building programs, and support opportunities for advisor-driven forums for professional development and networking.

Executive summary

Background

To achieve increased adoption of new practices by red meat producers there is a need to increase the number of livestock advisors and their skill base. MLA sought to explore how it could support a cooperative model that could support livestock advisors to build their expertise, networks and client base, while accessing business support services, mentoring and professional development. This study identifies gaps in service delivery for red meat producers, identifies some of the support and information needs of advisors, and proposes a model which builds upon existing successful advisor networking groups, for consideration by MLA and advisors working within the red meat sector.

Objectives

The overall objectives for the project were to:

1. Determine if a livestock advisor cooperative (or similar) model would be feasible for the red meat industry
2. Identify the scale of a potential market for this model
3. Provide recommendations for the resources, investment and governance approach required
4. Quantify the scale of income generation that could be achieved with the preferred model

The project has achieved its objectives by identifying the target population for a co-operative model, considering their needs in developing a proposed operating model, and undertaking financial and risk analysis.

Methodology

Initially, desktop analysis was used to identify gaps in advisory service delivery across regions. Information obtained from this analysis was used to develop survey questions for an online survey completed by 64 livestock advisors. Survey responses in turn were used to develop key discussion points within two facilitated focus groups for advisors and producers. Feedback from both the survey and focus groups, as well as data generated from the desktop study, was used to develop the key building blocks of a tiered membership organisation. Having developed an operating model and identified key assumptions, detailed financial and risk analysis were undertaken.

Results/key findings

Approximately 20% of livestock producers nationally have been identified as having no access, or only limited access, to locally-based advisory services. Several barriers to the entry of new advisors or expansion of livestock advisor businesses were identified, most significantly concerns around establishing a viable client base and managing additional staff.

Livestock advisors working in multiple contexts are eager to overcome professional isolation and share knowledge, experiences and technical resources with others. The main motivations to join a cooperative were confirmed as being able to access new networks, resources, and potential clients. The major concerns related to cost: benefit, time commitment and cultural fit.

Examination of existing successful models as well as the survey and focus group responses identified that a potential collaborative organisation for advisors needs to be independent, member-driven, reputable and based on trust.

A relatively high degree of market penetration (circa 30% of the identified national advisor population) is required to ensure viability for a multi-region tiered membership model offering enhanced service provision and collaboration opportunities, built on a common base of networking events and professional development. To generate positive earnings, a tiered membership model needs to rapidly introduce a wider range of services to attract significant numbers of advisors and producers to the highest fee categories.

Regional networking groups drawing upon a smaller pool of participants represent a feasible alternative to a commercial tiered membership model. A regional organization is likely to have a heavier reliance on volunteer (unpaid) commitment, and to be more restricted in terms of the scale and scope of events and services offered. There is potential application for the regional group approach in regions with distinct operating and industry environments.

Benefits to industry

Given the relatively small pool of established practitioners, the impact of advisor business failures or career changes away from advisory work can be significant for the red meat sector. Both the advisor and their client are likely to benefit from improved networks, upskilling and access to resources. If this approach can be developed and implemented on a wider scale, it could enable new entrants to upskill and gain both confidence and technical proficiency with guidance from more experienced professionals. Further it could offer established advisors or those nearing retirement to change the balance of their workload and potentially prolong their involvement. In each case, the skills base available to the red meat sector is likely to be enhanced.

Future research and recommendations

In terms of an advisor co-operative, there are two potential strategies which are likely to be applicable in different regions:

1. Expansion of the Regional Group networking approach in regions with small numbers of advisors/specific industry needs, as above (such as Western Australia, or north/west Queensland and the NT).
2. Development of a multi-region tiered membership model offering enhanced service provision and collaboration opportunities, built on a common base of networking events and professional development.

Further detailed consultation with advisors is recommended to explore the potential of these strategies, extending beyond the testing of the concept to provide clear details about the resources and member commitment which would realistically be required to develop either of these models successfully.

Subject to receiving sufficient expressions of interest, the tiered membership model could initially be developed as a staged pilot/prototype within a region where capacity exists to support a meaningful number of events as well as potential service expansion. Based on the desktop analysis as well as survey and focus group findings, potentially suitable regions for prototype development would include:

1. Central/Southern Qld and Fitzroy Basin
2. Central West/Tablelands/Northern NSW
3. Riverina/Murray regions NSW plus northern Victoria

However, the first and most important priority for establishment of a pilot project would be the level of interest and support from potential advisors within a region.

Overall, the interest from advisors in developing and maintaining a network of peers was resounding, and the opportunity for increased networking, industry level mentoring and peer to peer learning needs further attention. It is strongly recommended that MLA, potentially working with other RDC's, continues to explore options to expand the existing Livestock Advisor Network, drive engagement with participants in capacity building programs, and support opportunities for advisor-driven forums for professional development and networking, beyond existing technical updates.

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1. Background

To achieve increased adoption of new practices by red meat producers there is a need to increase the number of livestock advisors and their skill base. An innovative but viable livestock advisor and extension model is required to ensure that producers are motivated and supported to implement new management practices into their business. Traditionally, formal training and development pathways for livestock advisors have been limited, and numbers of agricultural extension officers and advisors remain static, with an ageing population. Retention of advisors within the industry, particularly within regional and remote areas, is also challenging.

Whilst other reports have considered nationwide agricultural extension capacity from a whole-of-industry perspective (Agrifutures 2024), there is limited information available concerning practitioners who specialise in working with livestock (i.e. beef cattle, sheep and goat) producers. This study focused upon this group within the broader advisor/consultant population, in order to find out more about their needs, challenges and appetite for new networking and collaborative opportunities.

MLA wishes to explore how it could support a cooperative model that could support emerging livestock advisors to build their expertise, networks and client base, while accessing business support services, mentoring and professional development. This study identifies gaps in service delivery for red meat producers, identifies some of the support and information needs of advisors, and proposes a model which builds upon existing successful advisor networking groups, for consideration by MLA and advisors working within the red meat sector.

2. Objectives

The overall objectives for the project were as follows:

5. To determine if a livestock advisor cooperative (or similar) model would be feasible for the red meat industry
6. Identify the scale of a potential market for this model that would consider the regions, advisors and producers who would see value in utilising this type of model
7. Provide recommendations for the resources, investment and governance requirements to develop the preferred model
8. Quantify the scale of income generation that could be achieved with the preferred model

Objectives 1 and 2 were addressed by initially conducting a desktop analysis to identify the size of the livestock advisor population and its geographic spread, as well as areas where the potential demand for services, as indicated by producer numbers, is disproportionate to the number of providers. Information gained from this analysis was used to develop survey questions and identify issues for focus group discussion, which explored the potential value of a co-operative/membership model to advisors. Having obtained valuable feedback from the survey and focus groups, it was possible to develop a potential operating model, identify key success factors, and establish underlying assumptions, which have enabled financial and risk analysis to be completed to satisfy the requirements of Objectives 3 and 4.

3. Methodology

The project was completed in three stages - desktop gap analysis, survey/focus groups and business model generation - with methodologies applied in each stage described below.

3.1 Stage 1: Desktop Gap Analysis

3.1.1 Definition and Data Selection

3.1.1.1 Definition of Advisors/Providers

Livestock advisors can be defined as people who provide regular advice and guidance to red meat producers and can be public or private sector advisors e.g. extension officers, consultants, veterinarians, livestock agents, agronomists or Natural Resource Management (NRM) officers.

This varied group of industry professionals provide consultancy services across a number of fields including, but not limited to, animal production, breeding, nutrition, agronomy, pasture and grazing management, marketing, natural resource management, business and financial management, strategy, succession, and staffing.

Consistent with the intentions of this project, which is intended to examine the value and potential viability of an advisor co-operative, the desktop analysis focused upon firms/organisations and individuals providing technical and financial consulting services specifically to livestock/red meat producers, where these activities are likely to represent a material proportion (>30%) of their total business activity. As such, the following types of organisations/individuals were excluded from the analysis:

- Accounting firms (recognising their significant role in providing financial and strategic business advice to many livestock businesses).
- Soil analytical/agronomy firms with a cropping or horticulture focus.
- Livestock Agents not classified as Livestock Production Advisors/Specialists by their organisation.
- NRM firms or public agencies with a primary focus on ecology, environmental impact, or water quality.
- Businesses providing ESG reporting and carbon offset initiatives across multiple industries
- Veterinarians providing primarily clinical services, scanning and pregnancy testing, as opposed to herd/flock health consultancy services.
- Government/district veterinarians and biosecurity officers.
- Landcare and NRM volunteer groups.
- Universities, research institutes and individuals primarily focused upon research activities.

3.1.1.2 Limitations of the Desktop Analysis

The definition above is arbitrary by nature, and in some cases firms or individuals may provide advice to industry groups, as opposed to individuals, or may provide services which are not listed within publicly available information sources. Whilst the list provided in Appendix A is drawn from as many sources as practicable, it is based on desktop research and industry knowledge, as interviewing individual firms was beyond the scope of the study. In the absence of further detailed investigation of individual providers, it is likely to contain omissions.

It should also be noted that the definition of roles within State Departments of Primary Industries and their equivalents is frequently unclear, with certain States now describing staff as Land Management or Natural Resource managers, as opposed to livestock industry development/extension officers as previously. For the purposes of this analysis, unless roles could be confirmed as specifically linked to livestock industries, they were excluded as providers.

3.1.1.3 Data Sources

Details of firms and providers were sourced from

- MLA (list of providers delivering MLA training and extension activities 2023-24)
- Meridian Agriculture (list of participants in the Livestock Consulting Internship program, since inception)
- AgriFutures Report: Australian Extension Capacity and Capability: A Map and Gap analysis (Appendix D: Stakeholders in the Australian agricultural innovation system)
- Organisational and event websites
- Personal communication with firms and individuals

The number of livestock (beef cattle and sheep) producers in each State and region was sourced from Australian Bureau of Statistics (ABS) data sets, which includes farm businesses with a turnover in excess of \$40,000 per annum. Unfortunately, due to changes in data collection and reporting, ABS no longer reports details of farm businesses by region or local government area, hence the analysis draws upon 2022 data sets, the most recent year for which this information is available.

As noted above, the list of providers generated may contain some omissions, given the limitations of a desktop exercise. Further investigation of the scope of service provision by firms or individuals would require personal contact/enquiry which was beyond the scope of this study.

3.1.1.4 Classification of Groups and Regions

The broad group of organisations providing advisory services to producers was categorised as follows:

- a) Independent Consultants (i.e. firms or individuals conducting business in a commercial capacity)
- b) Livestock Agents – Livestock production Specialists
- c) Producer Groups/Breed Societies/Other not-for-profit industry groups
- d) Publicly funded (Government)

In terms of geographic location, providers were allocated to one or more of 54 nationwide National Resource Management regions, at the request of MLA, in order to align with existing analyses and to reflect the range of environments/production systems where red meat producers are located (Appendix A).

Where large firms were known to have offices in multiple States or regions, these were sub-divided into regional/State based groups with advisors within the larger team allocated accordingly to regions, wherever possible.

This approach has certain limitations, namely

- a) Most providers (firms and individuals) operate across multiple regions, particularly in more remote/extensive areas. Hence the number of providers in a particular region may be understated.

- b) Livestock producers in remote regions typically access advice from multiple sources, including providers in other States and remote/online resources. In other words, producers operating in regions listed as having zero providers are still able to access certain advisory services.
- c) Whilst regions were allocated based on office or head office locations, individual consultants within firms may be based remotely and service clients in other locations.
- d) Whilst certain regions (e.g. the ACT and regions surrounding capital cities) appear in the list with no providers, in practice livestock producers in these areas interact with providers located in close proximity within surrounding regions.

Notwithstanding these limitations, when interpreted alongside a practical understanding of regional geography, the classification does provide insights into areas which currently have limited service delivery, both in terms of firms/organisations and individual advisors.

3.1.1.5 Classification of Activities

For the purposes of obtaining basic information about the types of services available, these were categorised within each region as follows:

- a) **Technical/Market:** including animal production, health, nutrition, breeding, pasture and grazing management advice, agronomy, farm infrastructure and layout planning, market/price information, basic cost-benefit information.
- b) **Financial/Strategic:** individual farm business and strategic plans, financial budgets and forecasts, scenario analysis, capital budgeting, feasibility analysis, succession planning
- c) **Group training and extension activities:** such as courses, field days, demonstrations and seminars.

The availability of each type of service within each region was identified based on known or published activities of firms and individuals operating within the region. Again, without exhaustive personal enquiry, it may be possible that some activities carried out by individual providers may have been omitted.

It should also be recognised that accountancy firms and other providers provide services within the Financial/Strategic category to producers, including those in remote regions, and hence service gaps identified within this advisory area may not necessarily exist in practice.

3.1.2 Analytical Process

For each NRM region and State, the number of firms/organisations within each organisational category (refer to 3.1.1.5) was identified, together with the estimated number of individuals working within each organisation. The service activities provided within each region were also identified, for each organisational group (i.e. independent consultants, livestock agents, etc).

For each region, the number of livestock (i.e. beef and sheep) producers was identified. Livestock producers were selected as the relevant comparative measure, as opposed to total livestock numbers, because producers represent the customer base. The number of livestock producers, per region, was then divided by the total number of providers and individual consultants, to obtain an indicative ratio of Producers/Provider, and Producers/individual Advisor. An average was calculated, weighted on the basis of producer numbers by region, for each of these ratios. Based on the average and range of results, individual region results were then classified as High/Mid/Low, and identified within results tables accordingly.

3.2 Stage 2: Survey and Focus Groups

3.2.1 Advisor Survey

The initial gap analysis report and its recommendations were considered in the design of a livestock advisor survey.

The survey design aimed to address

- Geographical segmentation based on service provision
- Potential client demand for advisors versus capacity of advisors
- The most significant issues and challenges facing individual livestock advisors and their firms, at different stages of business maturity
- The motivations and barriers of livestock advisors to consider involvement in a cooperative

The survey was distributed via numerous channels, including:

- MLA's general Facebook page
- MLA's livestock advisor Facebook page
- MLA's LinkedIn page
- Meridian Agriculture's LinkedIn page
- Meridian Agriculture's Facebook page
- Livestock Consulting Internship program (LCI) Alumni Facebook page
- Direct emails to employer and intern participants in programs 1-4 of the LCI program.
- MLA direct email to advisor contacts

In total, 64 advisors completed the online survey, exceeding the target participation of 50 responses.

Outcomes of the survey were summarised, and the information assisted in defining, confirming or outlining unknown information that needed to be tested in focus groups.

3.2.2 Focus Groups

Although it was initially intended that two focus groups would be facilitated (one for advisors, the other for producers), a decision to host three focus groups was made based on the density of livestock advisors across different geographical regions. From the perspective of producer involvement, it was assumed that producers may be more motivated to engage with a cooperative if it resulted in more advisors being made available to them. Coupled with an identified desire from advisors to gain more clients, the under serviced regions may provide the opportunity for a 'win-win' situation. The revised plan for three focus group sessions focused on"

1. A livestock advisor focus group
2. A northern producer group (Queensland, Northern Territory, Western Australia, and northern New South Wales)
3. A southern producer group (the rest of New South Wales, South Australia, Victoria and Tasmania)

Invitations for the advisor focus group were sent to the 37 survey respondents who stated an interest to participate. 18 advisors participated in the focus group session held on Monday 19 May 2025. The agenda and questions for the livestock advisor focus group are found in Appendix C.

Producer invitations were sent via NABRC, SALRC and WALRC, regional drought hubs, the Advancing Beef Leaders Alumni Facebook page, and via direct invitation via the Producer Adoption Reference Group (PARG), Meridian Agriculture contacts, and by request to several of the participants in the advisor focus group to share with their personal client networks.

Ultimately, seven producers signed up to attend the workshops and so it was decided to amalgamate into one focus group session, which was held on Friday 23 May 2025. Of the seven registered to attend, only five producers participated in the session. Four of the five participants represented the northern and western regions, which were areas considered to be under-serviced and hence of interest to the study. The agenda and questions for the producer focus group are found in Appendix D. Due to the low attendance, the participants were encouraged to share of their experience personally, providing significant insight through their sharing. Although the agenda was followed, more in depth qualitative data was able to be gained through the discussion.

3.3 Stage 3: Business Model Generation and Financial/Risk Analysis

3.3.1 Existing Advisor Co-operative/Group Models

Three examples of existing successful co-operative and consultancy group models drawn from Australia and the UK were considered in terms of their potential applicability to a livestock advisor's co-operative. For each existing model, a general overview of their operations is provided, before describing their management and governance, membership benefits and features, approaches to recruitment, and key features worthy of consideration for future models.

3.3.2 Business Model Generation

Key principles and values identified within the survey/focus group work, and which are also apparent when examining pre-existing successful models, were outlined and presented as a set of “guiding principles” integral to the development of any potential collaborative advisor model.

The “Business Model Canvas” tool (Osterwalder and Pigneur 2010) was utilised to develop the key building blocks of a tiered membership model, in the form of a multi-sided platform designed to meet the varied needs of advisors and producers over time.

3.3.3 Financial/Risk Analysis

As existing advisor networking and professional development groups have well-developed business models, in this study we have taken the approach of exploring the alternative tiered membership approach in greater depth, from the perspective of “What would it take to viably deliver these events and services to members?”

Key features of the proposed operating model are outlined, and a range of assumptions developed which form the basis of a 5-year financial forecast, including cashflow and start-up funding requirements. Sensitivity of earnings to key drivers such as member numbers, fees and sales volumes are explored, and scenarios for minimal viable numbers are outlined. Having established the level of participation and service demand required to operate the organisation on a profitable basis, the implications of this not being achieved and potential alternative pathways are explored in the Risk Analysis section of this report. A range of market, operational and financial risks are considered, with impacts, outcomes and potential mitigating strategies identified. Key areas of uncertainty and factors critical to success are identified, which form the basis of the conclusions and recommendations.

4. Results

4.1 Stage 1: Desktop Gap Analysis

4.1.1. Number of Providers by State and Region

4.1.1.1 Providers by State and Ratio of Producers to Organisations/Advisors

The number of providers within each State, by organisational type, is summarised in Table 1. A complete listing appears in Appendix A.

The total number of organisations of all types providing advice to livestock producers across all regions is estimated at 189 firms/groups and organisations, involving an estimated 848 individuals. It should be noted that exact numbers are difficult to quantify and separate from other generalist providers, as described in Section 3.1 above. This total appears reasonable in the context of previous reports which suggested that approximately 3000 practitioners were involved in extension across all forms of agriculture nationally, including a substantial proportion involved in specialist cropping roles, Landcare, NRM management and agribusiness (Agrifutures 2024).

As would be expected, provider numbers are higher in the States with more livestock producers (NSW and Victoria), although there are inter-regional variations within each State, as depicted in Table 2. The mix of providers varies between States, with more publicly-funded advisors operating in Queensland, and producer groups delivering more extension activity in NSW and Western Australia. It should also be noted that although ABS data indicates low producer numbers in the Northern Territory, the size of their properties/livestock businesses and their dispersal over a large and remote geographic area creates specific challenges in terms of seeking and procuring relevant consultancy services, particularly given low numbers of providers based in the NT.

When expressed in terms of Producers:Organisation and Producers:Advisor (individual), States with smaller producer numbers returned ratios of less than 400 producers per organisation, and relatively small numbers of producers per individual advisor (<65). Despite having the highest number of providers, NSW had significantly higher ratios, with 594 producers per organisation, and 159 producers per individual advisor. There is considerable variation within regions for the States with higher producer numbers, as described in Section 4.1.2 below.

4.1.1.2 Providers by Region and Ratio of Producers to Organisations/Advisors

A regional breakdown is provided for each State in Table 2. When the ratio of Producers:Organisation and Producers: Advisors is considered, there are considerable variations around the State means. Every mainland State and Territory has regions with no providers listed, with the exception of the Northern Territory, which is represented by a single NRM region with a small number of advisors.

There are some regional peculiarities which need to be taken into account, such as

- Queensland: no livestock producers listed in the Torres Strait NRM region, and only a very small number in Cape York – hence the lack of providers has less impact. Whilst there are livestock producers in the Healthy Land and Water (Greater Brisbane) region, the lack of locally-based providers is not particularly concerning given the existence of multiple providers in the surrounding Southern Queensland Landscapes and Burnett Mary NRM regions.
- ACT: No providers but a small number of producers, likely to be serviced by the surrounding South-East LLS, Riverina LLS and Murray LLS areas in NSW.
- Victoria: The lack of advisors based in the Wimmera is not surprising given the region's cropping focus, and the availability of advisors in nearby regions.

Table 1: Providers by State and Ratio of Producers to Providers, by State

State	Independent Consultants		Livestock Agents - Production Specialists		Producer Groups/Breed Societies//Other		Publicly funded Extension-focused		Total organisations	Total Advisors (est.)	Producers /org.	Producers/ Advisor (est.)	Total Producers
	Firms	Advisors	Firms	Advisors	Groups	Advisors	Public providers	Advisors					
Qld	21	95	3	3	1	12	8	49	33	159	413	86	13,643
NSW	28	129	8	8	9	26	3	10	48	173	557	155	26,738
ACT	0	0	0	0	0	0	0	0	0	0	-	-	47
Vic	30	162	3	3	2	9	3	11	38	185	492	101	18,711
Tas	6	62	1	1	1	1	0	0	8	64	319	40	2,548
SA	20	120	6	8	1	3	0	0	27	131	284	59	7,664
WA	15	95	5	6	7	15	1	1	28	117	246	59	6,902
NT	5	8	0	0	1	1	1	10	7	19	28	10	198

Table 2: Providers by Region and ratio of Producers to Providers, by Region

Advisor Groups by Region					0-250	0-50	Total Cattle/Sheep producers
					251-750	51-150	
					>751	>151	
State	Number	Region Name	Total Firms/Groups	Total Advisors	Producers/firms	Producers /advisors	
Qld	1	Burnett Mary	3	17	824	145	2471
	2	Cape York NRM	0	0	-	-	35
	3	Desert Channels Qld	3	7	273	117	820
	4	Fitzroy Basin	5	39	496	64	2482
	5	Gulf Savannah NRM	1	5	256	51	256
	6	Healthy Land & Water	0	0	-	-	1520
	7	Nth Qld Dry Tropics	5	39	134	17	668
	8	Reef Catchments	3	4	130	97	389
	9	Southern Gulf NRM	3	8	105	39	315
	10	Southern Qld Landscapes	9	39	458	106	4125
	11	Terrain NRM	1	1	546	546	546
	12	Torres Strait RA	0	0	-	-	0
			33	159	413	86	13,643
NSW	13	Central Tablelands LLS	4	16	730	182	2919
	14	Central West LLS	10	32	409	128	4090
	15	Greater Sydney LLS	2	4	-	-	366
	16	Hunter LLS	1	3	1,550	517	1550
	17	Murray LLS	5	20	445	111	2227
	18	North Coast LLS	0	0	-	-	2029
	19	North West LLS	4	29	697	96	2788
	20	Northern Tablelands LLS	9	26	290	101	2614
	21	Riverina LLS	10	35	361	103	3605
	22	South East LLS	3	8	1,137	426	3410
	23	Western LLS	0	0	-	-	1139
			48	173	557	155	26,738
ACT	24	ACT NRM	0	0	0	0	47

State	Number	Region Name	Total Firms/Groups	Total Advisors	Producers/firms	Producers /advisors	Total Cattle/Sheep producers
Vic	25	Corangamite	8	46	233	41	1864
	26	East Gippsland	5	14	112	40	559
	27	Glenelg Hopkins	12	51	303	71	3635
	28	Goulburn Broken	1	1	2,715	2,715	2715
	29	Mallee	2	13	346	53	691
	30	Melb Water	1	4	-	-	1433
	31	North Central	3	19	855	135	2565
	32	North East	4	13	447	138	1790
	33	West Gippsland	2	24	1,084	90	2168
	34	Wimmera	0	0	-	-	1292
			38	185	492	101	18,711
Tas	35	Cradle Coast	1	18	795	44	795
	36	NRM North	3	14	382	82	1147
	37	NRM South	4	32	152	19	607
			8	64	319	40	2,548
SA	38	Alinytjara Wilurara	0	0	-	-	2
	39	Eyre Peninsula	0	0	-	-	852
	40	Green Adelaide	3	31			
	41	Hills and Fleurieu	1	1	209	26	836
	42	Kangaroo Island	1	7	270	39	270
	43	Limestone Coast	11	50	192	47	2491
	44	Murraylands and Riverland	2	3			
	45	Northern and Yorke	8	38	190	40	1520
	46	SA Arid Lands	1	1	232	232	232
			27	131	284	59	7,664
WA	47	Northern Agricultural Catchments	0	0	-	-	990
	48	Peel Harvey	1	1	522	522	522
	49	Perth	2	26	11	1	22
	50	Rangelands	6	14	40	17	240
	51	South Coast	9	42	163	35	1469
	52	South West	4	6	478	319	1912
	53	Wheatbelt	6	28	291	62	1746
			28	117	246	59	6,902

State	Number	Region Name	Total Firms/Groups	Total Advisors	Producers/firms	Producers /advisors	Total Cattle/Sheep producers
NT	54	Territory NRM	7	19	28	10	198
			7	19	28	10	198
TOTAL					Average		0.003
			189	848	292	64	76,450
			Weighted Average		451	107	Weighted by % producers

When weighted according to the number of producers in each State, the average ratios across all States and Territories were estimated at 451 producers/organisation and 107 producers/advisor, noting as above the substantial variation around the mean.

Regional results were classified as Low/Medium/High based on the data population, as follows:

Producers/org.	Producers /advisors
0-250	0-50
251-750	51-150
>751	>151

Areas falling within each category are summarised in Tables 3-6 below and identified on the map in Figure 1.

4.1.1.3 Regions with No Known Locally-Based Livestock Advisory Services Providers

Table 3 summarises the regions with no known locally-based service providers, noting as described in Section 4.1.2 that the impact in some cases is likely to be minimal due to the presence of multiple providers within relatively close proximity.

Table 3: Regions with no known locally-based providers

State	Region Number	Region Name	Total Cattle/Sheep producers	Comment
Qld	2	Cape York	35	Low number of producers
Qld	6	Healthy Land & Water	1520	Greater Brisbane – See above, providers in surrounding areas
Qld	12	Torres Strait RA	0	No producers
NSW	18	North Coast LLS	2029	Significant producer numbers
NSW	23	Western LLS	1139	Significant producer numbers
ACT	24	ACT NRM	47	See above – providers in surrounding regions
Vic	34	Wimmera	1292	See above – providers in surrounding regions
SA	38	Alinytjara Wilurara	2	Minimal producers
SA	39	Eyre Peninsula	852	Significant producer numbers
WA	47	Northern Agricultural Catchments	990	Significant producer numbers
Total Producer Numbers			7896	10.3% of national total

These regions are identified by a red cross in Figure 1.

In total, there are 7896 livestock producers within these regions, comprising 10.3% of total livestock producers nationally. If the producers in Regions 6, 24 and 34 are excluded, on the basis of proximity to providers in nearby regions, there are still 5047 producers in these more remote areas, representing 6.6% of producers nationwide.

4.1.1.4 Regions with Low/Limited Local Advisory Service Provision

Table 4 identifies regions which were identified as having a small number of organisations/individuals providing services, with single firms or one-person organisations providing services in many cases. This group also encompasses regions with a relatively high ratio of producers to providers. These regions are identified in Figure 1 with an orange cross.

Table 4: Regions with Low/Limited numbers of locally based service providers

State	Region Number	Region Name	Total Orgs.	Total Advisors	Total Cattle/Sheep producers	Comment
Qld	5	Gulf Savannah NRM	1	5	256	Low producer numbers but single provider
Qld	11	Terrain NRM	1	1	546	Low producer numbers but single provider
NSW	13	Central Tablelands LLS	4	16	2919	High ratio producers/providers
NSW	16	Hunter LLS	1	3	1550	High ratio producers/providers
NSW	22	South East LLS	3	8	3410	High ratio producers/providers
Vic	28	Goulburn Broken	1	1	2715	High ratio producers/providers
Vic	30	Melbourne Water	1	4	1433	Providers in adjacent regions
Vic	31	North Central	3	19	2565	High ratio producers/providers
Tas	35	Cradle Coast	1	18	795	Single provider
SA	46	SA Arid Lands	1	1	232	Low producer numbers but single provider
SA	42	Kangaroo Island	1	7	270	Low producer numbers but single provider
WA	48	Peel Harvey	1	1	522	Low producer numbers but single provider
WA	52	South West	4	6	1912	High ratio producers/providers
Total Producer Numbers					19,125	25.0% of national total

Again, the practical impact of this classification varies according to location – producers on Kangaroo Island and Tasmania’s Cradle Coast, for example, can readily access services in adjoining regions. A similar situation prevails in the Melbourne Water, Goulburn-Broken and North Central regions in Victoria. However, sparsity of service provision presents more difficulty in northern Queensland, northern South Australia and Western Australia.

There is a significant producer population within this group, totalling 19,125 (25% of the national total). If Regions 28, 30, 31, 35, 42 and 48 are excluded on the basis of reasonable proximity to other regions and providers, there are still 10,825 producers (14.15% of national livestock producers) with relatively limited local service provision and/or a high ratio of producers/providers.

4.1.1.5 Regions with Mid-Range Local Advisory Service Provision

A larger number of regions fall into the mid-range in terms of service provision (Table 5). Generally these regions are characterised by multiple providers, with more than one advisor per organisation, and ratios of producers/providers which generally fall within the mid ranges around State means. Note that the NT (Territory) region falls within these benchmarks, however in practice still presents challenges in terms of a small number of providers attempting to cover a large geography.

Table 5: Regions with Mid-Range numbers of locally-based service providers

State	Region Number	Region Name	Total Orgs.	Total Advisors	Total Cattle/Sheep producers	Comment
Qld	1	Burnett Mary	3	17	2471	Relatively high producers/organisation
Qld	3	Desert Channels Qld	3	7	820	
Qld	8	Reef Catchments	3	4	389	
NSW	19	North West LLS	4	29	2788	Relatively high producers/organisation
Vic	29	Mallee	2	13	691	Relatively high producers/organisation
Vic	32	North East	4	13	1790	
Vic	33	West Gippsland	2	24	2168	Relatively high producers/organisation
Tas	36	NRM North	3	14	1147	Relatively high producers/organisation
WA	49	Perth	2	26	22	
WA	53	Wheatbelt	6	28	1746	
NT	54	Territory NRM	7	19	198	Large region
Total Producer Numbers					14,230	18.6% of national total

These regions are identified in Figure 1 with a blue cross. In total, 18.6% of producers fall within this category, and in practice Regions 33,36 and 49 also have reasonable access to providers in adjoining regions.

4.1.1.6 Regions with Upper-Range Local Advisory Service Provision

Remaining regions could be considered to have mid-high levels of advisory service provision, often with a mix of provider organisations, multiple firms per region, and multiple advisors per organisation. Within these regions, the ratios of producers/organisation and producers/individual advisor are below State averages. As would be expected, these higher levels of service provision tend to correspond to higher numbers of livestock producers within the region.

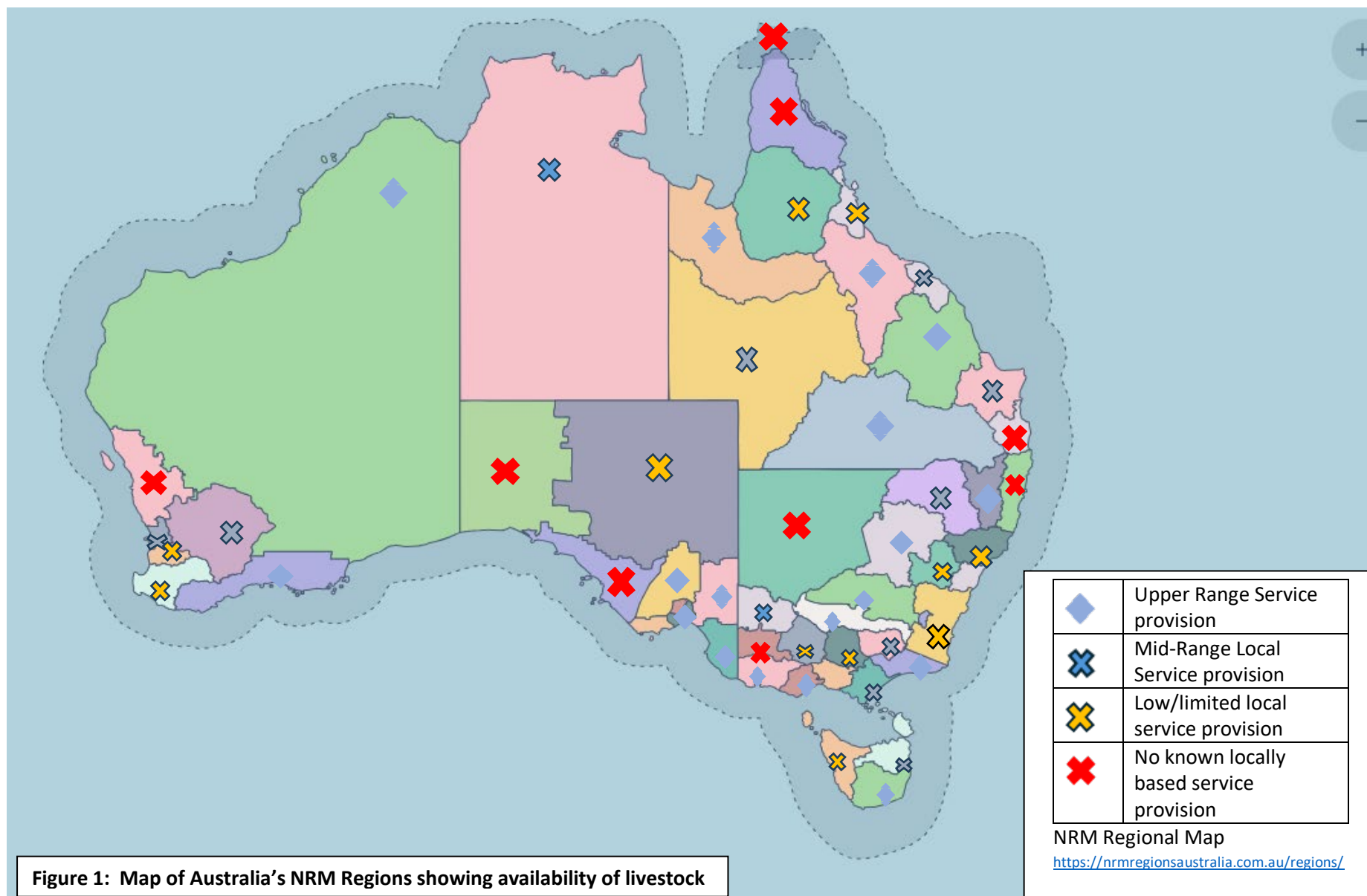
These regions are identified in Figure 1 by a purple/blue diamond, and represent 33,369 cattle and sheep producers, a sizable 43.6% of the national livestock producer population.

Again, there is a specific anomaly where the Rangelands NRM, representing the majority of northern Western Australia, has reasonable ratios of Producers:Providers within this analysis, due to low producer numbers. However, similarly to the NT's Territory region, there are still genuine challenges in terms of a small number of providers attempting to cover an extremely large and diverse geography.

Notwithstanding this, for the majority of the Regions in Table 6, producers have multiple options in terms of firms, organisations and individuals providing services to the sector.

Table 6: Regions with Upper-Range numbers of locally-based service providers

State	Region Number	Region Name	Total Orgs.	Total Advisors	Total Cattle/Sheep producers	Comment
Qld	4	Fitzroy Basin	5	39	2482	
Qld	7	Nth Qld Dry Tropics	5	39	668	
Qld	9	Southern Gulf NRM	3	8	315	Small producer numbers
Qld	10	Southern Qld Landscapes	9	39	4125	
NSW	14	Central West LLS	10	32	4090	
NSW	17	Murray LLS	5	20	2227	
NSW	20	Northern Tablelands LLS	9	26	2614	
NSW	21	Riverina LLS	10	35	3605	
Vic	25	Corangamite	8	46	1864	
Vic	26	East Gippsland	5	14	559	Small producer numbers, proximity to other regions
Vic	27	Glenelg Hopkins	12	51	3635	
Tas	37	NRM South	4	32	607	Small producer numbers, proximity to other regions
SA	40	Green Adelaide	3	31	836	
SA	41	Hills and Fleurieu	1	1		
SA	43	Limestone Coast	11	50	2491	
SA	44	Murraylands and Riverland	2	3		
SA	45	Northern and Yorke	8	38	1520	
WA	49	Perth	2	26	22	Small producer numbers, proximity to other regions
WA	50	Rangelands	6	14	240	
WA	51	South Coast	9	42	1469	
Total Producer Numbers					33,369	43.6% of national total



4.1.2. Types of Service Provision, by Region and State

As noted in Section 3.1.5, in the absence of a more exhaustive investigation requiring individual provider contact, advisory categories have been broadly categorised within each region into three categories, on the basis of known and/or advertised activities:

- a) **Technical/Market (T/M)**: including animal production, health, nutrition, breeding, pasture and grazing management advice, agronomy, farm infrastructure and layout planning, market/price information, basic cost-benefit information.
- b) **Financial/Strategic (F/S)**: individual farm business and strategic plans, financial budgets and forecasts, scenario analysis, capital budgeting, feasibility analysis, succession planning
- c) **Group training and extension activities (GT)**: such as courses, field days, demonstrations and seminars. It should be noted that whilst Group Training Activities may be prevalent within a State or Region, they may not cover all topics equally – for example there may be more of an emphasis on technical matters than financial or business training.

A breakdown of service provision by organisation type, per region is provided in Table 8. Where a service type is depicted as available within the analysis, it should be noted that not every organisation within each region will deliver the listed service for that region. However, when considered collectively, there is at least one provider, and producers can access the stated service type within the region.

Table 7 indicates the percentage of livestock producers in each State with access to:

- i. None of the three service types
- ii. Technical/Market services only (described as “Tech” in Table 7)
- iii. Financial/Strategic services only (described as “Fin” in Table 7)
- iv. Group Training services only (described as “Group” in Table 7)
- v. Technical/Market and Financial/Strategic services (“Tech + Fin” in Table 7)
- vi. Technical/Market + Group Training services (“Tech + Group” in Table 7)
- vii. All three service types

Table 7: Percentage of Livestock Producers with access to various service types within their region, by State/Territory

State/Territory	None	Tech only	Fin only	Group only	Tech + Fin	Tech + Group	All 3
Qld	11%	-	-	-	-	13%	76%
NSW	13%	10%	-	-	-	29%	48%
ACT	-	-	-	-	-	-	-
Vic	14%	-	-	-	4%	-	82%
Tas	-	-	-	-	45%	-	55%
SA	11%	4%	3%	-	-	-	63%
WA	22%	28%	-	-	-	3%	47%
NT	-	-	-	-	-	100%	-

Table 8: Service Provision by Organisation type, by Region

[illegible]

State	Suffix	Number	Region Name	Independent Consultants			Livestock Agents			Producer Groups/Breed Societies//Other			Publicly funded		
				TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP
Vic	CMA	25	Corangamite	X	X	X	X								X
		26	East Gippsland	X	X					X		X	X		X
		27	Glenelg Hopkins	X	X	X	X			X		X	X		X
		28	Goulburn Broken	X	X										X
		29	Mallee	X	X										
		30	Melb Water												
		31	North Central		X		X								X
		32	North East	X	X								X		X
		33	West Gippsland	X	X										X
		34	Wimmera												
State	Suffix	Number	Region Name	Independent Consultants			Livestock Agents			Producer Groups/Breed Societies//Other			Publicly funded		
				TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP
Tas	NRM	35	Cradle Coast	X	X	X									
		36	NRM North	X	X		X								
		37	NRM South	X	X	X				X		X			
State	Suffix	Number	Region Name	Independent Consultants			Livestock Agents			Producer Groups/Breed Societies//Other			Publicly funded		
				TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP
SA	Landscape Board	38	Alinytjara Wilurara												
		39	Eyre Peninsula												
		40	Green Adelaide	X	X	X									
		41	Hills and Fleurieu	X	X										
		42	Kangaroo Island	X											
		43	Limestone Coast	X	X	X	X			X		X			
		44	Murraylands and Riverland				X								
		45	Northern and Yorke	X	X	X	X								
		46	SA Arid Lands		X										

State	Suffix	Number	Region Name	Independent Consultants			Livestock Agents			Producer Groups/Breed Societies//Other			Publicly funded		
				TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP
WA	NRM	47	Northern Agricultural Catchments												
		48	Peel Harvey												
		49	Perth		X		X								
		50	Rangelands	X		X				X		X	X		X
		51	South Coast	X	X		X			X		X			
		52	South West	X			X								
		53	Wheatbelt	X	X		X			X		X			
State	Suffix	Number	Region Name	Independent Consultants			Livestock Agents			Producer Groups/Breed Societies//Other			Publicly funded		
				TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP	TECH	FIN	GROUP
NT			Territory NRM	X		X						X	X		X

When considering these results, it should be noted as previously that producers in certain States/Territories (Vic, Tas, ACT) and in regions surrounding capital cities can usually access a variety of services within reasonable proximity to their region.

Key points to emerge from the above analysis are as follows:

- Publicly funded providers fulfil a significant role in the eastern mainland States in terms of delivering group training activities, as well as technical advice through media/publications/websites. Producer groups have a similar role in Western Australia.
- Livestock Production Specialists working within livestock agencies have a strong presence in terms of provision of technical advice, and in practice usually travel outside the regions in which they are based.
- In excess of 45% of livestock producers in every State can potentially access the full range of services within their region, with the exception of the NT. Victoria has the highest proportion of producers in this category (82%), followed by Queensland (76%) and South Australia (63%). Note that this does not imply that the providers in these regions possess the capacity to deliver the full range of services to all of these producers, merely that the services exist. It is highly likely that a market shortfall would exist if the entire producer population within these regions attempted to access these services.
- NSW has a significant proportion of producers (29%) with access to specific technical advice and group training, but without known local providers of financial/strategic advisory services. As noted previously, this gap may be partially met through advice provided by accountancy firms.
- Western Australia has the highest proportion of producers without access to services, or with access to Technical/Market advice only (50% collectively).

In terms of implications for advisor businesses, multiple variables impact the threshold number or producers required for a viable level of service delivery. These include:

- The scale and stage of maturity of the livestock businesses in the region – the number of service points per year for a family-owned cattle operation with 250 breeders, minimal debt and limited expansion options is vastly different from a larger business or early-stage business which is expanding, under some pressure financially, employs staff of varying experience etc.
- The range of services offered –few consultants can rely on direct fees for consultancy services from producers, in practice these are usually cross-subsidised by analytical services such as soil testing or WEC's, involvement in industry projects, course delivery, or financial advisor commissions, amongst other sources. The number of viable clients therefore varies, depending on the range of services offered.
- The size and turnover requirements of the advisor business – a one-person firm with a restricted range of services has low overheads and simple insurance needs, and hence a very different turnover requirement to a multiple-principal firm with office staff, etc.

The number of businesses required to ensure viability is likely to exceed those in existence in several regions, so regions would need to be considered collectively as zones of operation, not individually. This is no different to existing practice whereby advisor firms tend to cover multiple regions and geographies.

4.2 Stage 2: Survey and Focus Groups

4.2.1 Livestock Advisor Survey

4.2.1.1 Key Findings

The average respondent works independently within their business, providing advice or services that are related to working directly with beef and sheep producers, in addition to undertaking some industry projects.

- 90% of respondents are working with beef producers, 78% working with sheep producers, and almost 30% working with goats, wool production, or dairy.
- 76% of respondents were aged between 30 and 60
- 65% own a business while almost 40% are employed within a business, noting some crossover with business owners who are also employees of that business.
- Almost 70% are working independently, and
- 88% are not providing advice in a sales capacity.
- 86% of respondents earn an income from red meat producers, 62% also derive income through industry projects and 45% obtain income through government-related projects.

The range of services provided by the respondents is quite broad, ranging from technical, production-focused advisory work (pastures, genetics, grazing systems) to business advice (planning, financial analysis, human resource management and coaching), in addition to the management of industry and government projects.

Just over 50% of respondents were keen to expand the range of services offered to their clients but found the key challenges to do so were:

- available time (48%)
- identifying viable income streams (46%) and
- the need to add or manage additional staff (35%).

Respondents also made comments that additional challenges faced in growing their business are

- marketing expertise
- managing or finding work for entry-level advisors, and
- A lack of quality and qualified advisers to be able to add to the business

While 54% of respondents employ staff, most of which operate in client facing advisory roles, there is a steady reliance also on employed staff in administrative and bookkeeping roles.

Of the respondents, 66% already operate their own business, yet of the remaining respondents only two respondents (3.57%) expressed a desire to start their own livestock advisory business, with another 10.71% stating they could consider doing so. It was acknowledged that start-up costs and establishing a client base were key barriers. In addition, respondents acknowledged that both an increase in knowledge and confidence would be required to run your own business.

Of those who would consider starting their own business, it was identified that assistance would be needed with managing finances and cash flow (87.5%), marketing and branding support (75%), followed by assistance in finding new clients (62.5%). 62.5% of those respondents also agreed that administrative support and professional development were needed.

Most respondents (88.68%) are not scaling back their advisory business or intending to exit the industry in the next five years. This should be seen in alignment with the age breakdown of all respondents, with very few approaching retirement age currently. Yet only 24.49% of respondents stated they have a succession plan for the continuity of their business. The common strategy identified for succession was based on equipping an existing team member, younger staff or graduates in order to take over at some point. As a result, when looking at the value in joining a cooperative, 34% of respondents were keen to provide mentoring on advisory and business services to younger advisors.

The biggest challenges faced by livestock advisors were

- Finding new clients (47.06%)
- Professional development and training (35.29%)
- The geographical spread of clientele (35.29%), and
- Time management challenges (35.29%).

Other limitations faced relate to a lack of willingness by producers to pay for services and the challenges/frustrations of gaining successful practice change or adoption by producers.

Regarding an approach to cooperative or collaborative working, there was a strong desire from respondents to network with, work alongside, and/or partner with other consultants. 30% of respondents stated they would ideally like to do this at least once a week, 41.5% at least once a month, and 17% once a year. Respondents were keen to consider how they may undertake joint projects (67.92%), share and receive information and/or advice from each other (66.04%) and offer complimentary advice or services to their clients (47.17%). Respondents understood the benefits of working alongside other advisors, identifying the opportunity for collaboration, enhancing their professional capacity, and as a result improving client outcomes. Supportive networks were identified as a motivator to reduce isolation. Commentary focused on how the emotional and professional support from peers may combat some challenges for sole operators, helping to sustain motivation and enhance their own job satisfaction. Respondents stressed the importance of trust and a culture of camaraderie in order for this to be achieved.

Without providing information on a cooperative model, respondents were asked if they would be interested to join a cooperative - provided the cooperative provided both business support and networking opportunities. 46.15% of respondents were agreeable, while 50% stated that they could be interested but needed more information. Most of the interest was around accessing networks of experts for collaboration opportunities as well as sharing the generation of leads and client referrals. Professional development and training followed, then the opportunity for mentoring and coaching support.

The two major concerns or barriers identified by respondents relate to

- **Cultural Fit:** issues of trust, compatibility and reputational risk. Respondents were concerned about different values, quality of service standards, and how different approaches may damage client relationships or personal reputation. A reluctance to work with others without close alignment in terms of standards, integrity and values was highlighted. There is also fear of poaching, and competitiveness over clients. In addition, intellectual property and confidentiality were mentioned as areas of concern.
- **The Cost:** As the financial and operational aspects of a cooperative model were not outlined in the survey, this led to some uncertainty from respondents. This lack of detail around how the model could function day-to-day, including the individual investment required, clarity on governance, decision-making processes and potential liability results in general reluctance.

Regarding the regional or national based cooperative modelling question, respondents were more concerned with ensuring the inclusion of advisors they respect, and/or providing different complimentary services to their own, than the regional location of other consultants.

While only 24% of respondents stated they would be likely to pay to become a cooperative member, another 66% stated they would consider paying a membership fee to access cooperative benefits, dependent on the cost and benefits.

4.2.1.2 Considerations from the survey

- Respondents generally represented a good demographic spread of advisors across the nation, however the survey population may be missing the voice of younger employees.
- It is a significant challenge for sole operators to build a business beyond themselves, due to the added time and investment cost considerations of doing so. This is coupled with a recognition of the need to grow new skills in marketing and employee management in order to sustain the necessary growth.
- The pressure for additional consultants to provide income to the business is a constraint that limits advisor business growth.
- There was little desire to start an independent business from respondents who are currently in an employment situation. However, this may be due to the demographics, with younger advisors potentially missing from the results.
- The needs identified by respondents when starting a new advisory business are wide and varied. The variety of skills required lends to the need to rely on others, or to outsource these skills at a cost.
- A cooperative may provide an opportunity for business succession. Although not a driving force for respondents to participate in a cooperative, it appears the model may provide a viable opportunity to identify possible suitors or an avenue to achieve successful transition.
- There is a strong desire for networking among advisors.
- Continuous learning and diversity of perspectives were identified as an opportunity to help drive innovation. This may be achieved through accessing a variety of viewpoints or experiences, while fostering an attitude of professional growth, and this also assists advisors to stay up-to-date with current industry practices. In addition, the peer-to-peer learning environment promotes adaptability and better problem-solving generally.

- Most of the interest was around accessing networks of experts for collaboration opportunities as well as sharing the generation of leads and client referrals. Professional development and training followed, then the opportunity for mentoring and coaching support. This suggests that a co-operative model could have a focus on encouraging greater collaboration, mentoring and general support, rather than business service support like bookkeeping, financial management, and administrative support.
- As a result of the need for the right cultural fit through professional relationships built on trust, the culture or behavioural aspects of the cooperative members needs to be agreed upon. Issues requiring consideration include governance, accesses to cooperative services, and how counter cultural fits are managed.

4.2.1.3 Emerging Themes from the Survey

a) Positive sentiment towards cooperative concept

Respondent sentiments were positive towards the concept of a cooperative. Respondents were motivated by access to resources and the shared knowledge of other advisors, enhancing professional growth and new skill acquisition, as well as the professional development and mentoring opportunities provided by the concept.

b) Key Barriers: Time and Cost

There were two key barriers that need further investigation. Firstly the time required to participate effectively. Secondly the financial cost required to participate and access cooperative benefits.

As both time and cost were not outlined in the survey question, further consideration is needed to outline both in the focus group activity. These barriers have impact on the modelling of the cooperative and the value it delivers for advisors.

c) Importance of Cultural Fit

A cautious approach by respondents to participating in a cooperative is based on the uncertainty surrounding the cultural fit or like values of other advisors. Some consideration needs to be given to governance, membership recruitment and management of participants, as well as the quality of work in alignment with cooperative expectations.

4.2.2 Focus Groups

4.2.2.1 Advisor Focus Group Summary

Participants in the focus group represented a range of geographical regions, sole traders, business owners with employees, as well as several employee participants. Anecdotally, the range of services offered by participants also varied, reflecting a broad range of approaches to advisory work.

Participants rated professional development and networking as ‘very important’ elements of a cooperative model that would motivate them to join (75% and 76% of participants respectively). While mentoring was considered ‘very important’ to only 35% of participants, it was considered ‘somewhat important’ by the majority (53%) of participants. Respondents stated that professional development and training opportunities in addition to the mentoring and intentional networking were vital in the design of any cooperative.

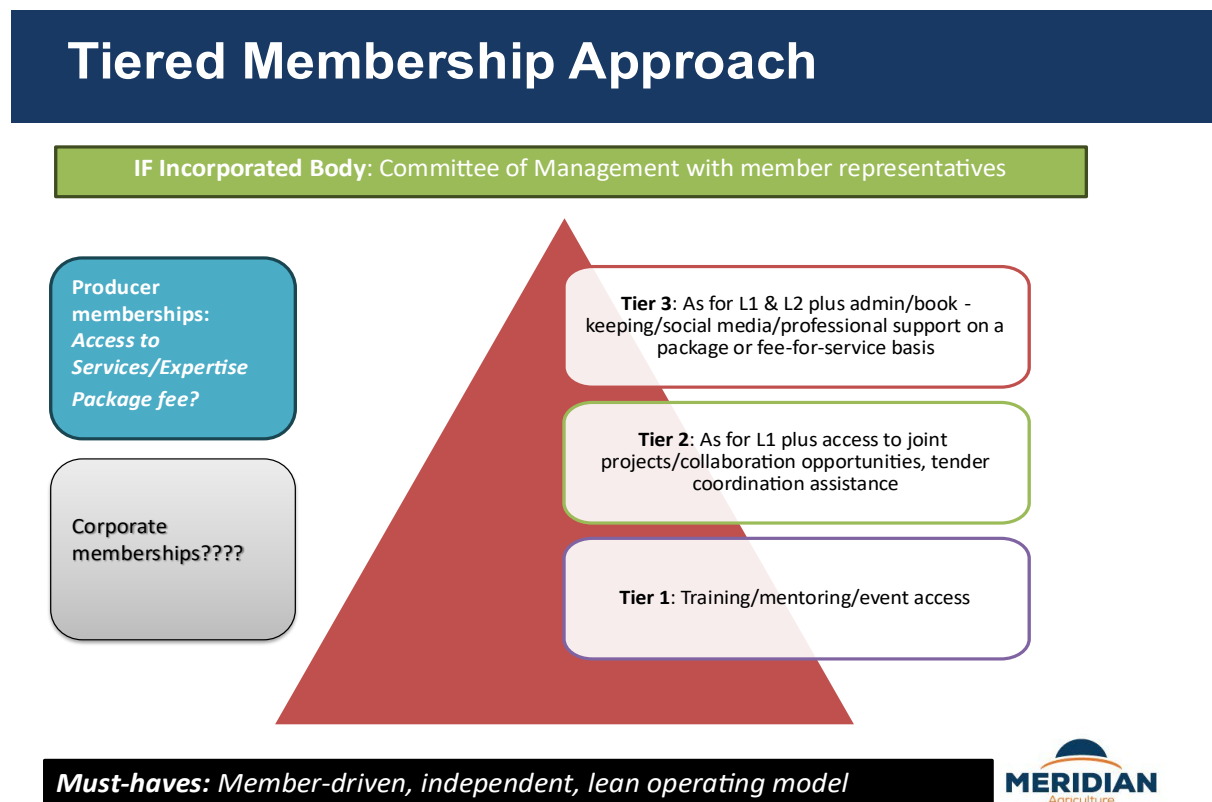
Participants were asked to consider the time commitment they could make to participating in a cooperative. Sixty percent considered giving between 4 to 8 hours per month a reasonable commitment to give or receive training, mentoring or participate in networking activities.

Figure 1 shows a proposed model that was presented to participants for consideration including a tiered approach to membership. (See model proposed in Appendix E). Most participants discussed and agreed to joining a cooperative at a tier two level accessing ‘training, events, joint projects, collaboration opportunities or tender coordination and assistance’ as their preferred tier level.

Participants were asked to offer an amount they were willing to pay for each tier level. The ranges for each level were:

- Tier One: \$200-\$300 annually
- Tier Two: \$500 to \$5,000 (Averaging approx. \$2,500)
- Tier Three: \$3,000 to \$20,000 (Averaging approx. \$6,000 on a small sample size)

Figure 2: Proposed model presented to both focus groups.



An Airtasker/Airbnb model of being able to bid on work requested by producers was shared with advisors, and although needing more consideration the vast majority (85%) were in favour of participating in a model that would bring in more client work for them.

Participants were more cautious when it came to understanding the suitability for corporate or commercial members to join a cooperative. 50% stated that it would depend on the person or business, while 30% stated that a cooperative should focus on independent advisors or advisory firm members.

Participants discussed the benefits of both a nationwide and regional cooperative model, yet 50% agreed that a nationally focused cooperative model would provide the best benefits to all. This may have been swayed by the nationwide spread of participant in the focus group.

4.2.2.2 Advisor Focus Group Findings

- The range of participants lends confidence to the information provided being reliable for a broad cross section of livestock advisors.
- The main motivations to join a cooperative were confirmed as being able to access new networks, resources, and potential clients. Secondary, was a desire to provide and receive mentoring.
- There was some reluctance to sign up for a cooperative model that may result a negative cultural fit or where the cost: benefit wasn't clear. These two components hand in hand provide a challenge in defining and developing a viable model.
- The focus group activity confirmed that the previously cited main barriers of cost and time were significant issues. Interestingly, the indicated ranges of both time commitment and financial investment were higher than expectations.
- The reluctance of accepting commercial/corporate members speaks to the desire for the right cultural fit.
- Regardless of the cooperative model itself, there was significant interest and goodwill from participants to further explore how a national network of livestock advisors could operate in order to share skills, expertise and resources. There was a considerable positivity and openness between participants to discuss new opportunities for collaboration and networking on both a regional and national level.

The poll question data and relevant chat responses can be found in Appendix F.

4.2.2.3 Producer Focus Group Summary

80% of participants in the producer focus group were owners or managers of red meat production businesses, the other participants represented producers and was able to speak on their behalf.

All participants used private 'fee for service' livestock advisory services as well as state government expert or extension staff, while 75% also received advice from resellers or sales representatives.

‘Value for money’, ‘independence’, ‘service quality’, and ‘relevant experience in the region’ were all considered ‘very important’ elements when deciding to use an advisor, yet only 60% stated it was ‘very important’ that their advisor was well connected with other experts or colleagues.

Yet there was an expectation that advisors undertake between 5 to 10 days (40%) or 10 to 20 days (60%) of intentional training activities, personal or professional development, and/or getting personal support or mentoring participants.

Responses to one poll question stated that only 25% would be ‘more likely’ to engage an advisor because they were part of a cooperative, whilst 75% of participants stated that an advisor’s engagement with a cooperative would have no impact on their decision to work with them. Yet, respondents outlined that the decision to choose an advisor was heavily reliant on developing a relationship of trust. Although the components of a trustworthy relationship were not discussed, participants stated that they were ‘more likely’ (60%) or ‘somewhat more likely’ (20%) to use an advisor knowing they had established networks of experts or mentors behind them; speaking to the aspect of trusted advice based on a communal knowledge.

The cooperative model was presented to producers. Participants stated that ‘gaining access to training events’ (60%), ‘access to a range of experts’ (60%), as well as ‘on-call advice’ and ‘joint servicing opportunities between consultants’ (both 40%) as useful components of a cooperative that they would consider using if offered.

When asked how much they would pay to become a member of a cooperative that provided access to on-call advice, access to training events, as well as a range of experts; 75% of participants were happy to pay up to \$2,000 annually.

60% of producers would prefer a cooperative to operate regionally versus nationally. Yet 20% agreed it didn’t matter where an advisor was based, if the advice was right. The other 20% stated that a mix of regional and nationwide approach should be considered.

4.2.2.4 Producer Focus Group Findings

- Due to the small sample size, the results of the producer focus group cannot be considered universal for all red meat producers. However, the in-depth considerations of producers participating do provide some insight into the perceived value of advisors and the cooperative modelling itself.
- The sentiment was strong for advisors to be providing quality service at a reasonable cost. Yet an expectation that an advisor would be well mentored and operating in a supportive network environment was not as highly regarded as a motivating factor.
- However, there is an expectation from producers that advisors should maintain professional development standards as well as an extensive network of experts. Doing so may provide a unique marketing advantage over other livestock advisors.
- However, as participants offered little encouragement for an advisor to participate in a cooperative, the marketing of their partnership may be of little benefit beyond the value of networking.

- The potential for producer memberships enabling access to a wider range of advisory services received only cautious support, with concerns raised regarding suitability and quality of advice, given the importance of personal relationships and regional knowledge to farm businesses.

Poll question data can be found in Appendix G.

4.3 Stage 3: Business Model Development

4.3.1 Existing co-operative and consultancy group models: Applicability and Potential

4.3.1.1 Crop Consultants Australia

Overview

Crop Consultants Australia (CCA) has been in operation since 1986, originally focused upon consultants servicing the cotton industry before changing its name to “Crop Consultants Australia Incorporated” in 2008. CCA is the professional network for those that provide agronomic advice to Australia’s cotton, grain, pulse and oilseed producers, with the aim of supporting the professionalism and technical knowledge of crop consultants. There are approximately 320 financial members, who have access to seminars and workshops, networking events, and online resources including research papers and reports. A fortnightly newsletter “Consultants Catchup” delivers news, research and product information, and members also have access to survey data and industry project updates. The association also publishes a membership directory, and provides representation at industry forums to ensure consultants and agronomists can contribute their views as issues arise and policies are developed.

Management and Governance

CCA is an incorporated body, run by a Board of up to nine elected members, including independent and corporate members. Each Director takes on a specific area of responsibility for the operations of the Board and the Association. The CCA Board is supported in day-to-day operations by the CCA Executive Officer.

Membership Benefits and Features

A key feature of the Association is the range of membership options available, which are linked to career stage and variable commitments to professional up-skilling – for example, Professional Members commit to 30 hours of up-skilling per year, with Young Professionals expected to complete 50 hours of up-skilling activity each year. Submission of annual records of up-skilling activity entitles these members to start the application process to obtain Chartered Agriculturalist (Cag) recognition through the Ag Institute Australia. The CCA logo is also available to eligible members for business stationery and uniforms to promote and recognise their commitment to up-skilling. All up-skilling records are reviewed annually by the Board to ensure that standards are maintained.

The organisation also offers membership categories to industry members (i.e. those employed within the industry who do not wish to submit annual records of up-skilling activity) as well as recent graduates (at a reduced rate) and students (free, to encourage participation within the profession). Life membership is offered to members who have made considerable contributions to the Association, via an annual nomination process (Table 1). All membership categories receive the same level of benefits including voting rights, except students and members under the age of 18 years who are not entitled to vote.

Table 9: Crop Consultants Australia (CCA) Membership Categories and Fees

	Annual Membership Fee	Career	Qualifications Experience	Employment	Upskilling
Professional Members					
Professional Consultant [#]	\$400	Established crop consulting career	Relevant tertiary qualification* and 10+ years' experience OR 20+ years of direct consulting experience ~	Self-employed or work for an independent consultant or a farming enterprise or agribusiness (reseller)	Demonstrate 30 upskilling hours/year Recognition for professionalism
Young Professional Consultant [#]	\$400	Starting a crop consulting or agronomy career	Relevant tertiary qualification* and less than 10 years of direct consulting experience ~	Spend more than 30 hours per working week (on average) providing agronomic advice	Demonstrate 50 upskilling hours/year Recognition for professionalism
Industry Member	\$400	Staying up to date with industry information	Employed by an industry organisation, research body, government department or product manufacturer/distributor. OR a practicing consultant or agronomist that opts to not submit an annual upskilling record.		N/A~
First Year Graduate Member ~	\$99	Taking the first step from Uni to full time work	A member who joins within their first year of graduation from an agronomy or related field of study and is either looking for work or entered the workforce.		N/A ~
Student Member ~	Nil	Learning about the industry and career opportunities	Studying agronomy or a related field full time with the intention of becoming an agricultural professional upon graduation OR employed in a related field full time while studying agronomy or related field externally.		N/A ~
Life Member[^]	Nil	Current member who had demonstrated significant, sustained, and high-quality leadership and support, which has enhanced the reputation and the future of the Association			

Fees are GST inclusive

Features potentially applicable to a Livestock Advisor's Co-operative

- Provision of training events at subsidised rates for members and access to technical resources, which are centrally coordinated and disseminated
- Structured approach to membership and professional development, linked to the Ag Institute Australia
- Linkages with student and graduate members

4.3.1.2 The Farm Consultancy Group (UK)

Overview

The Farm Consultancy Group (FCG) is a membership group for experienced farm management consultants, formed in the UK in 1997. All members are involved in farm business management consultancy, with some having additional technical specialist skills such as organic production, Countryside Stewardship schemes, dairy nutrition etc. The Group covers a wide area within the UK, stretching to Staffordshire and Lincolnshire as well as a substantial presence across South-West England and Wales.

Management and Governance

FCG is a Limited Company comprising 8 member businesses and 13 individual shareholders, plus a further 14 employee consultants operating within the individual member businesses. Membership is available by invitation only, and after serving as an Associate Member for 12 months, members may be offered the opportunity to become shareholders, providing that certain criteria are met. The Company has a Board drawn from the shareholder group, comprised of three directors and a company secretary, with the Chairmanship rotated on a biannual basis.

Membership Benefits and Features

The Farm Consultancy Group has a strong emphasis upon the provision of technical and marketing support for its members, through the provision of technical and specialist agricultural software, training, discounted professional indemnity insurance, social media and public relations. The group meets at least six times per year for training activities and business visits, with additional training and support offered to less experienced consultants. Members and their employees have access to farm budgeting and accounting packages developed by a sister company (FGC Accounting Ltd) as well as technical software applications. FGC provides a monthly newsletter to clients and maintains a social media presence which enables individual consultants to reach a wider audience, supported by strong branding and group advertising.

Full members and associates currently pay an annual fee of £2,200 (+ UK VAT). This covers meeting and training meeting expenses, PR & Marketing and other operating expenses of the group. Note that individual members operate their own offices, with their own administration and finance staff.

As the member businesses operate independently under the FCG “umbrella”, clients still experience personal service and individual relationships but have additional backup/reassurance provided by the presence of a larger organization with a respected brand. For consultants, FCG promotes the ability to be part of a support network without forgoing independence and interestingly offers the potential for consultants to benchmark their individual businesses against their peers. Membership also offers the ability to members and their staff to access high-calibre training providers at a reasonable shared cost, and to offer joint upskilling opportunities for less experienced staff.

Whilst the group offers a powerful marketing presence, there is also a shared culture of collaboration, problem-solving and sharing of client services. There is a long-standing emphasis within the group upon collective business and technical knowledge, networks of contacts and information within FCG and its employees, with sharing of articles, spreadsheets, and research on specific topics encouraged to reduce duplication of effort. FCG promotes the opportunity for individual consultants to tap into existing skillsets within the group to enhance their services to clients, and members may also refer clients on or provide introductions.

Recruitment and Progression

FCG has a highly structured approach to recruitment and member progression, which has developed over time to ensure that prospective members are compatible in terms of culture and business activities, as well as commercially successful with the potential to enhance FCG's reputation. Potential members are introduced to the group by the Recruitment Manager, before being invited to submit a CV and business plan, after which they are interviewed by the FCG Membership Sub-Group. New members need to be able to demonstrate:

1. A potential client base
2. References from existing clients
3. Complimentary skills to group
4. A complimentary geographic spread
5. High professional standards
6. A satisfactory and realistic budget for their business

If these criteria are met, the Membership Sub-Group may recommend approval, however the agreement of all shareholders is required before an invitation is extended.

Similarly clear criteria exist for progression from Associate Member to Shareholder status, including the presence of a solid client base, references, and a track record of contribution to the Group during their Associate Membership, including meeting attendance and promotional activities.

Features potentially applicable to a Livestock Advisor's Co-operative

The emphasis upon commercial viability of potential members, coupled with the relatively small size of the company and stringent entry criteria, has enabled the development of a close network of like-minded professionals with uniformly high expectations. This is generally considered to have contributed to FCG's strong brand and reputation within the UK agriculture sector. Whilst this model may not be entirely transferable to a wider Livestock Advisor network operating across a more diverse industry landscape in Australia, several aspects are worthy of consideration, including

- The strong emphasis upon member participation and contributions to management, governance and information transfer
- Clear criteria for membership and progression which helps to ensure compatibility and uphold the reputation of FCG
- The focus on consultant business growth, through group marketing and cross-promotion of services
- The commitment to the provision of specialist technical resources and training, which would normally be beyond the reach of individual consultants
- The shared tools and resources available to the group, including access to sister and spin-off companies (accountancy and labour hire) which have developed in tandem with the FCG.

4.3.1.3 South Australian Livestock Consultants

Overview

Given reduced support for publicly-funded extension services in South Australia, as in other areas of the country, independent livestock consultants play an important role in delivering technical and business management advisory services for the State's livestock producers. In 2010, a need to develop a professional support network for a growing cohort of independent livestock consultants in South Australia was identified and South Australian Livestock Consultants (SALC) was formed, with the aim of improving consulting services to, and building the capacity of the broadacre livestock industry.

The authors gratefully acknowledge the contribution of the SALC group and of Elke Hocking in particular, for preparing and collating responses to a series of questions. These responses are discussed below and drawn upon in subsequent sections of this report.

SALC's vision is "A growing and evolving group that achieves value for members through industry representation, social interaction, mentoring, collaboration and professional development". The group aims to build their own professional capacities, as well as the capacity of the wider South Australian livestock industry through developing and mentoring new consultants, developing networks and promoting the value of consultancy services. SALC also acts provides a representative "voice" for SA livestock consultants, acting as an independent conduit of information and evidence-based advice to industry, RDC's and government. The group hosts an annual SA Livestock Advisors Update conference each year, attended by professionals working across the livestock industry.

Currently, SALC consists of 17 livestock and business consultants, representing 19 businesses, including both sole trader businesses and representatives of larger firms. Group members work with individual producers, grower groups and the broader livestock industry applying a diverse range of skills in the fields of

- Livestock industry development and capacity building
- Group facilitation
- Adult education
- Animal husbandry technical skills
- Livestock infrastructure design
- Business management skills
- Family facilitation/mediation and succession planning
- People management and employment
- Research and management of both individual and collaborative projects.

Member businesses operate individually and most of their work is generated, managed and invoiced separately from the co-operative structure. Occasionally clients approach SALC via the group's website or other channels, and in these cases, there is an open call to all SALC members, and it is left to individual consultants to respond directly to the client proposal, either as an individual consultant or in a consortium with other SALC members. Competition between members or client poaching is not considered to be an issue, due to a general surplus of work and limited spare capacity within the group.

The annual membership fee is \$230/year which covers administration costs, venue hire for meetings and occasional speaker costs.

Management and Governance

Having initially commenced operation as an informal group with events organized through individual consultant businesses, SALC transitioned to an incorporated body in 2020, with each member business having voting rights. There is a four-member executive with a rotating chair and secretary, plus an honorary treasurer responsible for financial management and reporting. The group has employed an Administration Officer to handle routine administrative tasks. The group meets four times per year, in addition to their annual conference, and the responsibility of arranging and chairing these meetings is rotated amongst the membership. Whilst administration requirements have become more onerous as the organisation has grown, since incorporation SALC has appointed an Administration Officer to assist with the administrative load.

This structured approach, with existing governance in place, was cited by one member as one of the attractive features of SALC, as it ensures that the organization will continue to be driven, as opposed to relying upon ad-hoc gatherings.

Membership Benefits and Features

SALC enables its members to maintain a high level of technical competence by implementing professional development activities for the group. These activities also support SALC members to further develop their skills to successfully run their small businesses, and to develop a network of complementary professional services that enhance their business offerings.

Aside from professional development, the overwhelming theme identified in terms of membership benefits was that of overcoming isolation, by being able to share ideas and approaches with people of similar business type and structure. The ability to collaborate, ask for help, and obtain honest and relevant business advice from people in a similar situation was highly valued, as was the role of the network in troubleshooting, boosting confidence and maintaining enthusiasm for work. Mutual trust and respected relationships between members that support peer-to-peer learning are key factors.

“I think the original reason that SALC came into being still applies. ‘Smoky’ Brian Ashton felt isolated...as a lone livestock consultant and suggested we get together. The collegiality that followed was the glue that held SALC together and the opportunity to share in the cost of professional development and ideas to grow and promote business followed”.

A wide range of other benefits associated with membership were identified, including promotion, access to business opportunities, diversification of income streams, reducing business risks, keeping up to date with industry programs, better flows of information to and from funding bodies, and the ability to draw upon different skillsets to run courses or deliver projects. The opportunity to “give back” to the industry by providing mentoring services to university students is also an attraction, with several SALC members mentoring students each year, as well as offering work experience placements. SALC also works closely with the Agricultural Institute of Australia (AIA) to encourage new and aspiring consultants into the industry, attending university networking functions alongside AIA to promote careers in agriculture and industry linkages.

As the group has developed, more formal opportunities for professional development have emerged. Similarly to Crop Consultants Australia, SALC encourages their members to become accredited with the Agricultural Institute of Australia as either CPAg (Certified Practicing Agriculturalist) or CAg (Chartered Agriculturalist), through structured professional development programs. SALC also encourage memberships to the Australasia Pacific Extension Network (APEN) and the Australian Association of Animal Sciences.

Recruitment and Progression

Although the individual requirements differ from those of the Farm Consultancy Group (FCG), SALC also has clear criteria for membership eligibility and ongoing involvement with the organisation:

- Members must have a proportion of their clients within SA (or work on projects that service the SA red meat and wool industry).
- Government employees are eligible, provided they have no conflict of interest if the group lobbies the Government.
- A person is eligible for membership if the advice they provide to clients regarding the purchase of product(s) or equipment is based on the needs of the client, and not influenced by commission received from sales.
- There is a maximum of two members per business

There is an expectation that members will attend 75% of face-to-face meetings over a rolling 2-year period, in the absence of reasonable extenuating circumstances. Online consultant highlights meetings are exempt, however it is compulsory to submit a brief written report twice a year for these meetings. There is also an expectation that members will actively contribute to the group, by being involved in working groups such as the SALC Executive Committee and annual Livestock Advisor Update Organising Committee, as well as contributing to the roles and responsibilities of SALC meetings and events. Members should regularly undertake professional development, networking and education through SA Livestock Consultants Group forums, as well as other avenues.

Prospective members need to be nominated by an existing member of the group, and the intakes of new members are limited to twice per year in February and August. New applications are received by the Administrative Officer, but a letter introducing the new member to SALC must also be provided to the Administrative Officer by the nominating member, endorsing them as potential members. The Executive committee undertakes an initial screening process and makes a recommendation for approval or raises concerns for further discussion/investigation if required. Their recommendation is then sent to the membership for approval or otherwise.

The strict membership guidelines are considered essential in ensuring a good “cultural fit”, and it is notable that the core membership of SALC has remained very consistent over the last ten years. Where members do not meet the criteria for the group, such as actively contributing to group meetings, they are required to withdraw from the group, but in practice, members in this situation tend to “self-identify” and withdraw of their own accord. Other reasons for leaving the group are varied, including retirement, not meeting membership criteria, or inability to commit sufficient time to meetings to gain value from membership. However, these individuals frequently still attend the annual SALC Livestock Advisor Update, which is open to all professionals working within the livestock industry.

Features potentially applicable to a Livestock Advisor’s Co-operative (Other Regions)

The SALC model contains many valuable learnings when considering the development of a wider advisor co-operative. There is no substitute for real-world experience, and the success of SALC over a 15-year period, as well as the excellent reputation of the group and its events, are testament to the considerable effort, commitment and goodwill invested by its members since its inception.

Features of the SALC model which are important considerations for potential/future Livestock Advisor organisations include:

- The “organic” development of the organisation over time, from an informal group focused upon technical updates through to an incorporated body actively seeking to influence industry and government. Members believe that it was essential to build up relationships and trust between members before committing to a specific governance structure.
- In addition to technical upskilling, the value obtained from the network in terms of business advice, support, and access to opportunities – which grew from shared experience and trust.
- Clear goals which extend beyond the development of individual members and their businesses to a wider focus upon building capacity across the SA livestock sector, as well as strengthening linkages with government and industry bodies.
- Activities and linkages which complement the work of other organisations, such as AIA, rather than competing or replicating.
- The strong commitment required from individual members to active participation in SALC’s management and operations, and the level of accountability required in terms of reporting.
- Similarly to the UK Farm Consultancy Group, clear criteria for membership eligibility and the requirement for prospective members to be introduced/endorsed by existing members and to undergo an initial screening process, which helps to ensure compatibility and common purpose.

4.3.2 Summary of Existing Models

The preceding three examples, whilst having multiple features and values in common, also have some variances in their focus, activities and geographic reach (Table 10). The Farm Consultancy Group has some distinct features, such as group “umbrella” marketing, a shareholding structure and a focus upon shared IP, which differentiate it from the local examples – although members cite many of the same benefits to involvement.

Crop Consultants Australia (CCA) and South Australian Livestock Consultants (SALC) represent two distinct approaches in terms of organizational size, focus areas and geographic spread. The CCA model relies upon a broader base of membership to offer a wide range of resources and events, than the region-specific SALC approach. Both groups are well-established and successful, and it could be argued that either approach could be utilised successfully to improve training and networking opportunities for livestock advisors across other regions

Table 10: Summary of Advisor Group focus areas, activities and geographic reach

Organisation	Number of members	Regional/National	Access - training and events	Technical resources and organisational IP	Networking	Professional Development	Co-working and shared projects
Crop Consultants Australia	320	National, but eastern States focus	Available across large membership group	Yes, centrally coordinated resources	Organised events	Accredited through linkages with AIA	Informal
Farm Consultancy Group (UK)	8/13 shareholders	Multiple areas within UK but relatively small geographic area	Restricted to small membership group	Yes, centrally coordinated resources with specific IP	Informal between members	Internally organised	Regular
South Australian Livestock Consultants	17	Regional	Some open access (annual Livestock Advisor Update) but other activities within small membership group only	Yes, shared amongst membership group	Organised events and informal between members	Accredited through linkages with AIA	Regular

4.3.3 Development of an expanded Livestock Advisor Co-operative Approach

4.3.3.1. Essential Principles and Values

When considering the options available for a new Livestock Advisor collaborative model, there are some key principles and values which have been identified within the survey/focus group work, and which are also apparent when examining pre-existing successful models:

- **Independence** – of both the organisation and its members (i.e. freedom to act without undue influence from commercial interests or industry/government bodies)
- **Member-driven** – the organisation must be initiated, grown and developed through member effort, to ensure that it meets their needs and is sustainable over time
- **Reputable** – in terms of the conduct of the group, the services provided and the composition of the membership
- **Based on Trust** – a key “building block” for successful networking, collaboration, co-working and mentoring

If these values/criteria are not achieved in practice, the organisation is unlikely to deliver lasting benefits to the target population of livestock advisors, and by extension to the red meat industry. These guiding principles need to be integral to the development of any potential collaborative advisor model.

4.3.3.2. Extending the Focus and Scope

Given that the survey and focus group consultation revealed specific interest in generating business leads and referrals, as well as co-working and mentoring opportunities, it may also be useful to consider a tiered membership model which offers an extension of the existing approaches – namely targeted/differentiated service provision and collaboration opportunities built on a common base of networking events and professional development.

An advantage of this approach is that over time, it could extend across multiple regions, with a broad membership base enabling greater income potential and a larger pool of potential mentors, trainers and collaborators. Such a model, once established, could also incorporate producer members seeking access to expertise and resources. An example of a tiered membership approach, with different membership categories, appears in Figure 3.

An earlier version of the proposed model (Figure 2) was presented to the focus groups during the consultation process, which incorporated a third/upper tier of membership offering access to packaged support services. Based on the feedback obtained from the focus groups, where a strong preference for Tier 2 membership was indicated, it was decided to simplify the model to incorporate two membership tiers, and to make packaged support services available as an add-on option to Tier 2 members, on a fee-for-service basis.

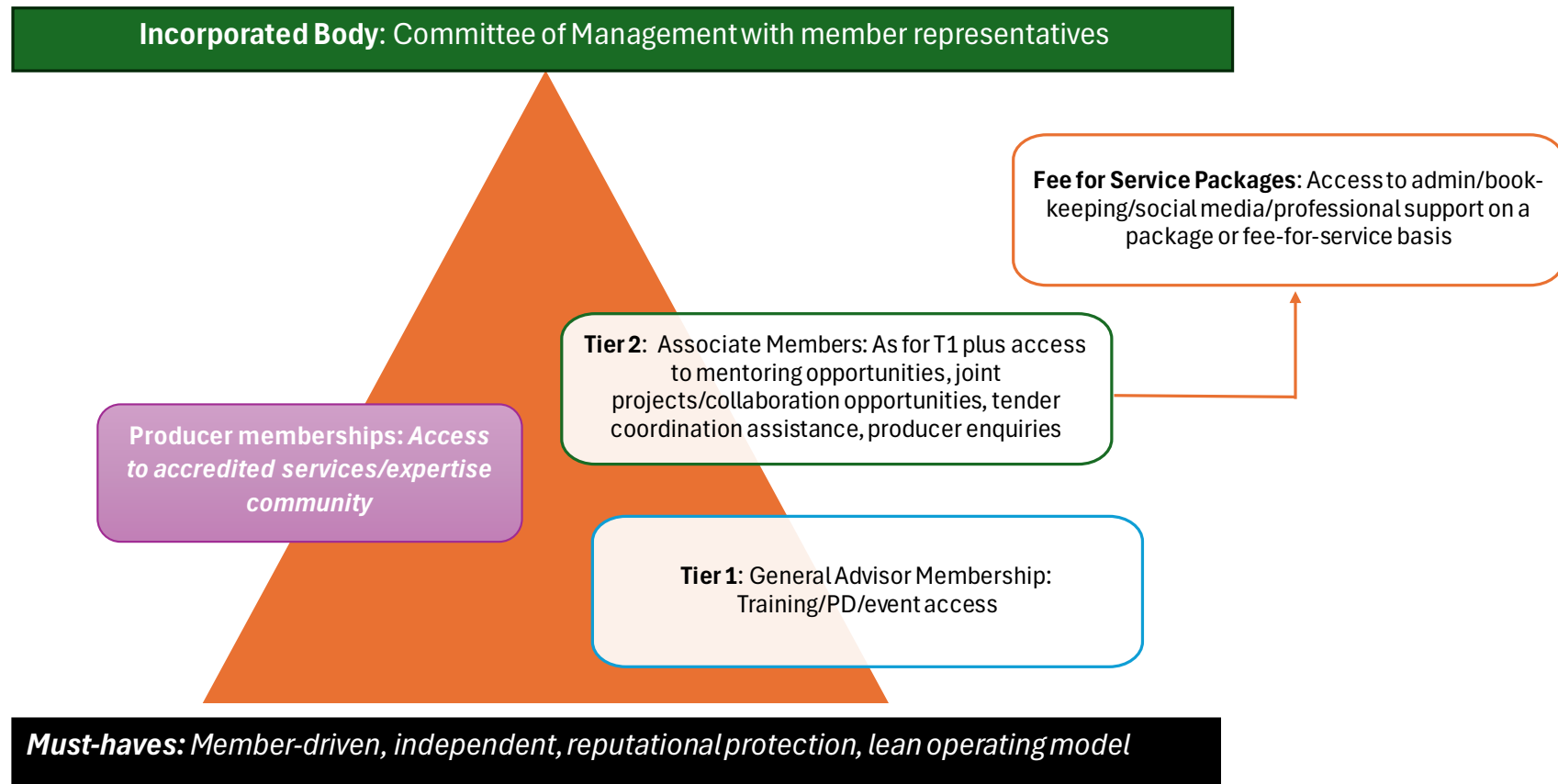


Figure 3: Potential Advisor Group Operating Model: Tiered Membership

A tiered membership organisation has both advantages and limitations, when compared to a regional networking group, which are summarised in Table 11 below.

Table 11: Advantages and limitations of a “Regional Networking Group” versus “Multi-region Tiered Membership” approach

Regional Networking Group – focused on events and training	Multi-region tiered membership model offering a range of services to members
<p><i>Advantages/Opportunities</i></p> <ul style="list-style-type: none"> • Common industry background and environment • Smaller size – easier to build “collegiate” atmosphere • More agile, less managerial and administrative commitment • Lower cost structure • Opportunity for specific training/events to meet local demand and address regionally specific issues • Likely to foster client referrals and collaboration via informal networking over time • Ability to link with AIA to formalize professional development and access opportunities beyond the group 	<p><i>Advantages/Opportunities</i></p> <ul style="list-style-type: none"> • Can tailor services/commitment /benefits to different needs • Can stage the offering – introduce new services and opportunities as the membership grows and networks develop • Ability to introduce more stringent membership requirements/progression criteria for higher tiers whilst preserving a broad base of general members • Larger pool of members and income, offers options for more services and employed officers • Wider scope of activity and influence • More providers across regions offer scope for producer memberships and commissioned work
<p><i>Limitations/Risks</i></p> <ul style="list-style-type: none"> • Difficult to develop or enforce membership criteria in an informal group – risk of incompatibility or dominant influences • Limited scope for wider range of activity, depending on numbers involved and income generated • May struggle to operate in areas with limited advisors (lack of critical mass) • Will require ongoing voluntary contribution to organizational efforts – may not be evenly shared or sustainable 	<p><i>Limitations/Risks</i></p> <ul style="list-style-type: none"> • Membership is likely to be more dispersed, with fewer points of commonality • Personal recommendation method may be less effective in promoting compatibility amongst members in a larger group • Networking opportunities are likely to be more structured/formal, less personal, potentially less effective • Higher financial risk if member numbers decline • Requires start-up funding unless strong volunteer input in early stages

Subject to the necessary interest and commitment from potential members, there is potential application for the Regional Group approach in certain regions of Australia with distinct operating and industry environments, such as Western Australia or far North Queensland and the Northern Territory. This opportunity arises due to the combination of limited advisor numbers (conducive to a closer-knit

group relying on informal networking) and the very distinctive features of their environments and production systems, which require specific solutions and skills.

The existing SALC model presents an excellent case study example for the formation and development of such groups, which would be extremely valuable to others considering a similar approach.

For other regions, or for advisors seeking additional opportunities and services, the tiered membership approach has the potential to deliver value to a broad range of advisors through differentiated service provision, and may also offer opportunities for producer involvement.

As existing organisations have well-developed business models, in this study we have taken the approach of exploring the alternative tiered membership approach in greater depth, from the perspective of “What would it take to viably deliver these events and services to members?”. Having established the level of participation and service demand required to operate the organisation on a profitable basis, the implications of this not being achieved and potential alternative pathways are explored in the Risk Analysis section of this report.

4.3.3.3. Application of the Business Model Canvas tool

The Business Model Canvas approach (Osterwalder and Pigneur 2010) provides a shared language for describing, visualising, assessing and changing business models. It defines a business model simply as “how an organisation creates, delivers and captures value”, described through nine basic building blocks which cover the four main areas of a business: customers, offer, infrastructure and financial viability. Defining the nine building blocks for any business helps to identify its strategy, which in turn determines structure and systems. Each building block is briefly described in Table 12, with key questions and characteristics listed, as an introduction to the key elements within the Business Model Canvas.

These building blocks and questions have been considered in the context of the potential tiered membership organisation for livestock advisors, to further develop the concept. A prototype Business Model Canvas for a tiered membership approach appears in Figure 4.

Note that the Business Model Canvas is designed as hands-on tool which is designed to foster understanding, analysis and discussion. It is most valuable when presented in a large format, amongst a group where people can work on each element, draw diagrams and connections and start to “visualise” the proposed business model. As such, Figure 4 represents an initial model outline which could form the basis for further consultation and discussion.

Table 12: The nine Building Blocks of the Business Model Canvas

Building Block	Definition	Key questions	Characteristics/Options
Customer Segments	Groups of people to reach or service	For whom are we creating value? Who are our most important customers?	<ul style="list-style-type: none"> • Different needs • Different channels • Different relationships • Different margins • Different willingness to pay
Value Propositions	How the company solves customer problems or meets customer needs	What bundles of products or services are we offering to each customer segment?	<ul style="list-style-type: none"> • Quantitative – price, speed of service, accessibility • Qualitative – product design innovation, customer experience, risk reduction
Channels	Touch points: how the business reaches its customer segments to deliver its value proposition	How do customer segments want to be reached? How will we deliver to them and support them?	<ul style="list-style-type: none"> • Communication • Distribution/Sales • After-sales support
Customer Relationships	Relationships developed within each customer segment	What sort of relationships do our customers expect?	<ul style="list-style-type: none"> • Self-service • Personal assistance • Dedicated support • User communities
Revenue Streams	Income generated from Customer Segments	For what value are customers really willing to pay? How do they want to pay?	<ul style="list-style-type: none"> • One-off transactions vs recurring revenues • Usage or subscription fees • Licensing • Fixed or dynamic pricing
Key Resources	Assets required to make the business model work	What resources do our value propositions require?	<ul style="list-style-type: none"> • Physical • Financial • Intellectual • Human
Key Activities	The most important actions which make it work	Which activities create and deliver value?	<ul style="list-style-type: none"> • Production • Problem-solving • Providing a platform
Key Partnerships	The network of suppliers and partners that make it work	Which key resources do we acquire from partners/suppliers? Which key activities do they perform?	<ul style="list-style-type: none"> • Optimise resources • Extend capability • Reduce risk
Cost Structure	Operating costs - driven by resources, activities and partnerships	What are the most important costs inherent in the model?	<ul style="list-style-type: none"> • Cost driven – minimize through minimal offer, automation and outsourcing • Value driven – focus on value creation, loyalty and premium service provision

Key Partnerships <i>Outsourcing/External Suppliers and Partners</i>	Key Activities <i>Which deliver value – the most important things which make it work</i>	Value Propositions (VP) <i>Solve customer problems/satisfy customer needs</i>	Customer Relationships <i>Within each segment</i>	Customer Segments <i>Needs & behaviours justify a distinct offer</i>
Member businesses/individuals Providers of admin and other support services Industry partners, e.g. MLA and other industry groups Providers of accreditation and training services Website/platform support	Facilitate member relationships and trust Screening/reputational protection Identify training/PD priorities and coordinate/deliver relevant activities Facilitate sharing of opportunities, enable connections, and support collaborative processes Deliver/outsource/coordinate delivery of quality support services	Networking and Mentoring - <i>knowledge transfer, backup, transition</i> Training and PD - <i>accessible, relevant, useful</i> Tenders/project team coordination - <i>access, complementary skills, administrative support</i> Referrals and collaboration - <i>client opportunities, sharing of expertise</i> Support service packages - <i>free up time to focus on higher value work</i> Access to expertise beyond existing channels - <i>accredited, wider networks, new service options</i> <i>Customisation Approach</i>	Foster sense of belonging/network Personal assistance User communities and co-creation Automated registration to events	Younger/less experienced advisors seeking mentors/advisors as mentors Advisors seeking training/PD Advisors seeking collaboration/shared projects/referrals
	Key Resources <i>Assets required to deliver value/make the model work</i>		Channels Touch Points: <i>Communication /distribution/sales</i>	Advisors seeking business support services
	Intellectual: Industry knowledge, shared resources Human: networks, skills, ability to meet service needs, voluntary contributions		Direct - direct/personal comms, website, online training delivery Indirect - via industry groups, RDC's	Producers seeking access to accredited service providers, via referral or tender approach
	Technological: Platform/database			<i>Multi-Sided Platform</i>
Cost Structure		Revenue Streams: from successfully delivering VP's		
User-pays events with cost recovery objective Minimise overheads Flex resources to match volume/demand for services Governance and membership approvals driven by members as voluntary contributions		Aim: Recurring revenues Subscription fees Longer-term - licencing of group IP/training products for member use? External funding or industry sponsorship in line with organisation objectives/values Static pricing, product/feature dependent, not demand-driven		

Figure 4: Business Model Canvas: Tiered Membership Model for Livestock Advisors

4.3.3.4. Proposed Operating Model

Having explored the nine building blocks, it is possible to define the proposed business model as a multi-sided platform offering customised services to distinct groups of members, aiming to generate recurring revenues and encouraging a user-pays approach for higher levels of service delivery, whilst minimising overheads.

Key features of the tiered membership operating model are modelled as follows:

Overview

- Independent entity funded primarily through member subscriptions, event fees and service provision on a fee-for service basis
- Member-driven and managed, with support staff
- Flexible options for commitment/involvement
- Referral and approval process for membership progression
- Higher participation/contribution expectations linked to membership tiers offering collaboration/co-working opportunities
- Informal and formal networking and mentoring options
- Staged roll-out of service offerings

Membership options

- Membership fees linked to tier of membership
- Tier 1: General Advisor Membership - offers access to training and professional development events, both online and in-person, informal networking and mentoring between members and access to shared/industry resources
- Tier 2: Associate Membership - As for T1 plus access to formal mentoring and networking opportunities, joint projects/collaboration opportunities, tender coordination assistance, access to producer enquiries
- Mentor/Senior Associate Membership – available to suitably experienced Tier 2 Associate Members who provide formal mentoring services
- Upon successful establishment and if agreed by members – option of Producer memberships, providing access to accredited service providers
- Membership coordinated and administered internally by employed Administration officer (option to outsource initially)

Membership Progression

- Initially, founding members may opt for Tier 2 participation, at a reduced fee, with the expectation that they form the inaugural committee of management and participate in the organisation's early development
- Once established, Tier 2 membership would be available after 12 months of Tier 1 participation
- Participation expectations and code of conduct to be developed by Management Committee
- Once established, recommendation/reference required from 2 existing members for Tier 2 membership
- Tier 2 membership applications to be approved by membership sub-committee and referred to Management Committee for endorsement

Events, training and professional development

- Open to all members
- Mixture of online (webinars) and face-to-face training opportunities
- Reduced/subsidised cost of attendance
- Annual conference/workshop
- Option to log activities for accreditation through linkage with Ag Institute Australia

Support services

- Provision of admin/book-keeping/social media/professional support on a package or fee-for-service basis to Tier 2 members, on a cost-plus margin basis
- General professional support, administration and project co-ordination services provided in-house by employed Support/Project Officer/s, book-keeping packages co-ordinated internally but outsourced to professional providers

Collaboration and Referral Opportunities

- Central coordination of project, tender, client referral and collaboration opportunities for Tier 2 members, via expressions of interest
- Administrative support for project proposals and project teams on a fee-for-service basis

Management and Governance

- Structure dependent upon the organisation's planned activities and focus, but likely to be structured as an incorporated body as a separate legal entity, to enable staff to be employed and to reduce potential liability of members
- Committee of management to be elected from Associate Membership, with committee members contributing their time on a voluntary basis but reimbursed for out-of-pocket expenses
- Honorary Chair, secretary and treasurer positions rotated every two years
- Sub-committees for membership and event organisation (voluntary, with paid support staff)
- Participation in governance and/or management functions expected as a requirement of membership

Staffing

- Administration and project support staff employed on a part-time basis or contracted as appropriate, to match demand for services
- To minimise overheads, staff to work from own offices or business premises, with allowance for office expenses

Activity Groups

- To assist in analysis, key business activities are grouped into categories as follows:
 - Membership, events, training and development
 - Co-working and project management, Producer Services
 - Packages and Professional Services Support

4.3.3.5. Financial Model

Staged Development

To allow the organisation and member relationships to become established before launching activities which carry greater financial or reputational risk, a staged offering of products and services is proposed. The timing of introduction and the forecast growth in memberships and services provided is summarised in Table 13, as follows:

Table 13: Staged service/product offerings: Years 1-5

Year of Operation	1	2	3	4	5
Tier 1 General Advisor Memberships	45	80	100	120	140
Tier 2 Associate Memberships	35	70	95	95	95
Mentor/Senior Associate Memberships		10	14	25	25
Producer Memberships		60	130	155	155
Online Webinars	6	8	10	10	10
Training Days (in-person)	2	3	4	4	4
Annual conference		1	1	1	1
General professional support hours	20	50	75	100	120
Social media packages			15	35	40
Client admin and comms packages			12	25	30
Book-keeping packages			6	25	30

Total advisor membership numbers at Year 3 (209) represent 24.6% of the estimated total of 848 individuals providing livestock advisory services to producers (refer to desktop gap analysis). This is forecast to increase to 260 advisor members in total by Year 5, representing 30.7% of the estimated advisor population. It is conceivable that the organisation could also attract individuals from related professions not previously included within the definition of “advisor”, such as researchers and rural bankers. However, this level of participation represents a significant target, and should these member numbers not eventuate, the scope and features of the organisation would need to change to ensure viability, which is discussed further in the Risk Analysis section of this report.

Note that in practice, the decision to offer a wider group of products or services, and the timing of the offering, would be determined by the Committee of Management. The suggested product volumes and timing contained in Table 5 represent initial assumptions for modelling purposes.

Key Assumptions

Projected membership numbers, events and service volumes appear above in Table 13. Other key assumptions in terms of pricing and staffing are summarised in Table 14.

Table 14: Key Assumptions: Pricing and Staffing

Year of Operation	1	2	3	4	5
Pricing					
Inflation Rate	2.5%				
Mark-up on out-sourced services	10%				
Rebate on Mentor/Senior Associate Membership	30%				
Tier 1 General Advisor Membership Fee (\$)	250	250	250	275	275
Tier 2 Associate Membership Fee (\$)	650	850	1,500	1,500	1,500
Mentor/Senior Associate Membership Fee (\$)		595	1,050	1,050	1,050
Producer Membership Annual Fee (\$)		750	1,000	1,025	1,050
Trainer/presenter fees/day (\$)	2,000	2,050	2,101	2,154	2,208
Training day fee/member participant (\$)	90	100	100	100	100
Conference fee/member participant (\$)	150	150	175	175	175
Social media package (\$)	1,200	1,230	1,261	1,292	1,325
Client admin and comms package (\$)	1,200	1,230	1,261	1,292	1,325
Book-keeping package (\$)	1,800	1,845	1,891	1,938	1,987
Other professional support services (\$/hr)	175	179	184	188	193
FTE salary: admin/coordination (\$)	79,000	80,975	82,999	85,074	87,201
FTE salary: project/tender management (\$)	95,000	97,375	99,809	102,305	104,862
Staff office expense contribution/FTE (\$)	1,200	1,230	1,261	1,292	1,325
Staffing					
Membership/Event coordination: FTE	0.3	0.6	1.0	1.0	1.0
Project/co-working administration, Producer services	0.2	0.4	0.8	1.0	1.2
Support services – FTE			0.8	1.3	1.3

Forecast fees are based upon precedent examples (CCA, SALC), as well as indications gained from focus group consultation and survey responses. A 30% rebate/discount is applied to Tier 2 members providing formal mentoring services or support to the organisation, in recognition of their contribution.

Forecast fees are not inflation-adjusted but instead incorporate some introductory discounts in the organisation's early years. To encourage initial participation, Tier 2 membership is discounted in Years 1-2 of operation, and producer members are also offered an introductory discount in Year 2. Note that these fee assumptions are applied for financial modelling purposes, but in practice, fee structures would need to be developed by the organisation's committee of management, based upon their understanding of the target market and objectives. Multiple options could be explored, such as a "founding member" rate instead of

introductory rates, to which a permanent discount could be applied over time. This alternative approach could potentially avoid or mitigate the risk of membership losses if the Tier 2 rate reverted to the full fee amount after an introductory period as currently modelled.

Fees for packaged services are based upon the estimated weekly/monthly/annual hours to deliver the package, with other professional fees and staffing requirements based upon existing examples of secretariat services/project management carried out by professional services firms, including Meridian Agriculture.

Financial Projections: Operating Income, Expenditure and EBIT

Projected income, expenditure and EBIT appears in Table 7. The forecast cashflow statement and balance sheet appear in Table 8 and Table 9 respectively.

Table 15: Forecast 5-Year Operating Income, Expenditure and EBIT

Operating Forecast	Year 1: 26/27	Year 2: 27/28	Year 3: 28/29	Year 4: 29/30	Year 5: 30/31
INCOME					
Tier 1 Advisor Membership	\$11,250	\$20,000	\$25,000	\$33,000	\$38,500
Tier 2 Advisor Membership	\$22,750	\$59,500	\$142,500	\$142,500	\$142,500
Tier 2 - Professional Support	\$0	\$5,381	\$13,789	\$22,615	\$25,112
Mentor/Senior Associate Membership	\$0	\$5,950	\$14,700	\$26,250	\$26,250
Package fees income/Professional support	\$3,500	\$8,969	\$59,176	\$144,842	\$175,506
Producer Membership	\$0	\$45,000	\$130,000	\$158,875	\$162,750
Training event fees (in-person)	\$1,350	\$5,000	\$6,000	\$10,000	\$12,000
Conference fees	\$0	\$6,000	\$10,500	\$14,000	\$14,000
Sponsorship/External (Training) Funding	\$0	\$10,000	\$15,000	\$20,000	\$20,000
TOTAL INCOME	\$38,850	\$165,800	\$416,666	\$572,081	\$616,618
EXPENSES					
Membership, events, training and development					
Wages	\$23,700	\$48,585	\$82,999	\$85,074	\$87,201
Staff travel/subsistence reimbursement	\$5,000	\$6,000	\$8,000	\$10,000	\$10,000
Consumables/Printing/Postage	\$1,000	\$1,000	\$1,000	\$1,250	\$1,500
Speaker expenses	\$7,000	\$12,300	\$15,759	\$16,153	\$16,557
Conference Costs - venue/catering	\$0	\$12,000	\$15,000	\$18,000	\$18,000
Consumables					
Total Expenses - Events & Training	\$36,700	\$79,885	\$122,759	\$130,478	\$133,258
Co-working and project management, Producer Services					
Wages	\$19,000	\$38,950	\$79,848	\$102,305	\$125,835
Total Expenses - Co-working/Projects	\$19,000	\$38,950	\$79,848	\$102,305	\$125,835
Packages and Professional Services Support					
Wages	\$0	\$0	\$66,400	\$110,597	\$113,362
Outsourced services - book-keeping/finance	\$0	\$0	\$10,212	\$43,614	\$53,645
Total Expenses - Professional Services	\$0	\$0	\$76,612	\$154,211	\$167,007

Operating Forecast	Year 1: 26/27	Year 2: 27/28	Year 3: 28/29	Year 4: 29/30	Year 5: 30/31
<i>Gross Margin</i>					
Events, training and development	-\$24,100	-\$38,885	-\$66,259	-\$53,478	-\$48,758
Co-working and project management, Producer Services	\$3,750	\$70,931	\$206,442	\$221,685	\$204,527
Packages and Professional Services Support	\$3,500	\$14,919	-\$2,735	\$16,881	\$34,749
Total Gross Margin	-\$16,850	\$46,965	\$137,448	\$185,088	\$190,518
Fixed Operating Expenses	Year 1: 24/25	Year 2: 25/26	Year 3: 26/27	Year 4: 27/28	Year 5: 28/29
Staff office/admin expense contribution	\$600	\$1,230	\$3,278	\$4,264	\$4,636
Telephone and internet	\$2,400	\$2,460	\$2,522	\$2,585	\$2,649
Management Committee Expenses	\$3,000	\$3,075	\$3,152	\$3,231	\$3,311
Rent	\$0	\$0	\$0	\$0	\$0
IT Support and subscriptions	\$10,000	\$10,250	\$15,000	\$15,375	\$15,759
Insurance and Workcover	\$6,500	\$8,000	\$13,000	\$15,000	\$15,000
Accounting and professional fees	\$10,000	\$11,500	\$12,500	\$15,000	\$15,000
Consumables, postage, sundries	\$2,000	\$2,050	\$2,101	\$2,154	\$2,208
OD interest	\$300	\$500	\$500	\$800	\$500
Depreciation- equipment	\$0	\$0	\$0	\$0	\$0
Total Fixed Operating Expenses	\$34,800	\$38,565	\$51,553	\$57,608	\$58,564
Total Operating Costs	\$90,500	\$157,400	\$330,770	\$444,602	\$484,664
EBIT	-\$51,650	\$8,400	\$85,896	\$127,480	\$131,954

Key points to note from the projections

- The organisation incurs an operating loss in Year 1 (circa 52k), before delivering a (modest) positive EBIT of \$8,400 in Year 2.
- The introduction of full fees for Tier 2 Associate members in Year 3, coupled with assumed growth in Tier 2 Associate membership numbers and greater demand for professional/co-working support, is forecast to deliver a significantly higher EBIT from Year 3 onwards.
- In this forecast, the organisation effectively subsidises the cost of training/PD events, workshops and conferences from other activities, with these Tier 1 activities producing a negative Gross Margin over the 5-year forecast period. The cost of coordinating membership and events is relatively high (0.3 increasing to 1.0 FTE over time) and fee income is modest, due to low attendance fees and conservative attendance predictions. For these activities to break-even, attendance fees would need to rise significantly, and/or the organisation would need to secure external sponsorship or funding.
- Fee-for-service packages made available to Tier 2 members from Year 3 onwards are modest contributors to earnings, until Year 5 when a higher uptake of support packages is forecast.
- The introduction of Producer memberships in Year 2, and associated fee income, is attributed to Tier 2 (Co-working/Project Management and Producer Services). This potentially represents an important source of revenue to the organisation, with enquiries and requests coordinated by employed staff.
- In the absence of Producer memberships and services, earnings would be reduced by approximately 100-120k across Years 3-5, which would translate to an operating loss in Year 3, and only marginally positive earnings in Year 4 and Year 5.

- The forecast relies heavily upon a lean overhead operating model, with no business premises – instead remote staff would receive a contribution towards their office expenses, phone and internet expenses. Other overheads and professional fees increase in line with business activity over time, but total fixed operating costs represent less than 10% of income in Year 4-5.

Based on the forecast earnings, start-up funding of \$55,000 would be required at the commencement of operations as working capital (Table 16).

Table 16: Statement of Forecast Cashflows

Statement of Cash Flows	Year 1	Year 2	Year 3	Year 4	Year 5
Operations					
Net Profit Before Tax	- 51,650	8,400	85,896	127,480	131,954
Add back: Investor Leases	-	-	-	-	-
Add back: depreciation	-	-	-	-	-
Add back: bank interest	300	500	500	800	500
Less: Non-Cash Inventory gain (Add back Loss)					
Less increase (decrease) in working capital	2,583	- 3,003	- 3,875	- 2,079	- 224
Less taxation	-	-	-	-	-
Net Operating Cash Flows	- 48,768	5,898	82,521	126,201	132,231
Investing					
Additions - Property, plant and equipment					
Net Additions - Transferable Investments					
Less: Sale of Capital items					
Less: Start-up capex allowance					
Net Investing Cash Flows	-	-	-	-	-
Financing					
New Funding Invested	55,000				
New Loan capital drawn down					
Dividends received					
Less: Bank Interest	- 300	- 500	- 500	- 800	- 500
Less: Repayment of Bank Financing					
Less: Repayment of Investor Capital					
Less: Other Dividends Paid					
Net Financing Cash Flows	54,700	- 500	- 500	- 800	- 500
Net Cash Movement	5,933	5,398	82,021	125,401	219,470
Opening cash	-	5,933	11,330	93,351	218,751
Closing cash	5,933	11,330	93,351	218,751	350,482

Table 17: Forecast Balance Sheet

Balance Sheet (\$) (Closing)	Year 1	Year 2	Year 3	Year 4	Year 5
Current Assets					
Cash	5,933	11,330	93,351	218,754	350,482
Receivables (5% of sales)	1,943	8,290	20,833	28,604	30,831
Inventories					
Other	-	-	-	-	-
Total Current Assets	7,875	19,620	114,184	247,356	381,313
Non-Current Assets					
Investments					
Property, Plant & Equipment					
Total Non-Current Assets	-	-	-	-	-
TOTAL ASSETS	7,875	19,620	114,184	247,356	381,313
Current Liabilities					
Payables (assume 5% of Op Costs)	4,525	7,870	16,539	23,094	24,233
Interest Bearing Liabilities	-	-	-	-	-
Provisions					
Total Current Liabilities	4,525	7,870	16,539	23,094	24,233
Non-Current Liabilities					
Interest Bearing LTL	-	-	-	-	-
Investor Loans					
Total Non-Current Liabilities	-	-	-	-	-
TOTAL LIABILITIES	4,525	7,870	16,539	22,230	24,233
Equity					
Contributed Equity	55,000	55,000	55,000	55,000	55,000
Revaluation Reserves	0	0	0	0	0
Retained Profits (Losses)	- 51,650	- 43,250	42,646	170,125	302,080
TOTAL EQUITY	3,350	11,750	97,646	225,125	357,080

To generate a positive financial return, the tiered membership model needs to progress rapidly to introduce a wider range of services, and to attract significant numbers of both advisors and producers. In practice, the rate of expansion may be limited by market demand and operational constraints, which would delay earnings and result in higher working capital requirements to fund initial deficits. Should the organisation not proceed to the point of offering extensive professional service support, earnings are likely to reflect the modelled position in Year 2, i.e. at best marginally positive EBIT.

4.3.3.6. Sensitivities, minimum viable numbers and scenarios

As noted above, improvements in forecast EBIT are linked to the introduction of Producer memberships and expansion of co-working and professional support services from Year 2 onwards. Earnings are also strongly linked to membership participation and fee income, as key revenue sources and drivers of demand for services.

Sensitivity analysis was carried out to determine the impact of variable numbers of Tier 1 and Tier 2 memberships, as well as different levels of fee income, on membership income and EBIT (Table 18 and Table 19 respectively). Projected performance in Year 3 was used as the basis of analysis, as at this stage the organisation could be regarded as established, with full fees being charged.

Table 18: Impact of variable member numbers and fee income on membership income

Year 3		Fee			
Tier 1 membership income	25000	200	250	300	500
Member numbers	50	10,000	12,500	15,000	25000
	100	20,000	25,000	30,000	50000
	150	30,000	37,500	45,000	75000
Year 3		Fee			
Tier2 membership income	142500	750	1000	1500	2000
Member numbers	50	37,500	50,000	75,000	100,000
	95	71,250	95,000	142,500	190,000
	150	112,500	150,000	225,000	300,000

Table 19: Impact of variable member numbers and fee income on EBIT

Year 3		Fee			
EBIT Impact		200	250	300	500
Member numbers	50	70,896	73,396	75,896	85,896
	100	80,896	85,896	90,896	110,896
	150	90,896	98,396	105,896	135,896
Year 3		Fee			
EBIT Impact		750	1000	1500	2000
Member numbers	50	-19,104	-6,604	18,396	43,396
	95	14,646	38,396	85,896	133,396
	150	55,896	93,396	168,396	243,396

Given the significantly higher cost of Tier 2 membership, both membership income and EBIT are more sensitive to changes in Tier 2 membership fees and participation, than variations in Tier 1 participation or fees. When considered in isolation, i.e. assuming that Tier 2 remains constant, EBIT remained positive across a range of Tier 1 member numbers (50 – 150) and fees (\$200 - \$500). However, EBIT was negative when Tier 2 membership declined to 50 members, at a reduced membership charge of \$750 - \$1000, assuming that Tier 1 income was unchanged.

Whilst multiple combinations of Tier 1, Tier 2 and Producer memberships can be explored within the financial model, with corresponding variations in staffing requirement, the model EBIT in Year 3 is close to break-even with 70 Tier 1 members, 50 Tier 2 members and 120 Producer members. In the absence of Producer members, approximately 140 Tier 1 members and 120 Tier 2 members are required in order to break-even at Year 3, assuming constant event activity levels and demand for professional support/co-working services. This represents approximately 30% of the national livestock advisor population, as identified from the desktop analysis.

Volume scenarios (i.e. the impact of increasing/decreasing memberships and sales of service packages) are explored further in Table 20. By Year 3, EBIT remains positive even when impacted by a 30% reduction in sales volumes across all membership/service categories.

Table 20: Impact of changes in sales volumes of memberships and service packages on EBIT

EBIT Baseline		-\$51,650	\$8,400	\$85,896	\$127,480	\$131,954
Scenarios:		Year 1:	Year 2:	Year 3:	Year 4:	Year 5:
Volume		26/27	27/28	28/29	29/30	30/31
-30% T1		-\$55,025	\$2,400	\$78,396	\$117,580	\$120,404
-20% T1		-\$53,900	\$4,400	\$80,896	\$120,880	\$124,254
-10% T1		-\$52,775	\$6,400	\$83,396	\$124,180	\$128,104
10% T1		-\$50,525	\$10,400	\$88,396	\$130,780	\$135,804
20% T1		-\$49,400	\$12,400	\$90,896	\$134,080	\$139,654
30% T1		-\$48,275	\$14,400	\$93,396	\$137,380	\$143,504
-30% T2		-\$58,475	-\$9,450	\$43,146	\$84,730	\$89,204
-20% T2		-\$56,200	-\$3,500	\$57,396	\$98,980	\$103,454
-10% T2		-\$53,925	\$2,450	\$71,646	\$113,230	\$117,704
10% T2		-\$49,375	\$14,350	\$100,146	\$141,730	\$146,204
20% T2		-\$47,100	\$20,300	\$114,396	\$155,980	\$160,454
30% T2		-\$44,825	\$26,250	\$128,646	\$170,230	\$174,704
-30% Producers		-\$51,650	-\$5,100	\$46,896	\$79,817	\$83,129
-20% Producers		-\$51,650	-\$600	\$59,896	\$95,705	\$99,404
-10% Producers		-\$51,650	\$3,900	\$72,896	\$111,592	\$115,679
10% Producers		-\$51,650	\$12,900	\$98,896	\$143,367	\$148,229
20% Producers		-\$51,650	\$17,400	\$111,896	\$159,255	\$164,504
30% Producers		-\$51,650	\$21,900	\$124,896	\$175,142	\$180,779
-30% Packages		-\$52,700	\$5,709	\$68,143	\$84,027	\$79,303
-20% Packages		-\$52,350	\$6,606	\$74,060	\$98,512	\$96,853
-10% Packages		-\$52,000	\$7,503	\$79,978	\$112,996	\$114,404
10% Packages		-\$51,300	\$9,297	\$91,813	\$141,964	\$149,505
20% Packages		-\$50,950	\$10,194	\$97,731	\$156,448	\$167,056
30% Packages		-\$50,600	\$11,091	\$103,648	\$170,932	\$184,606

4.3.3.7. Funding Requirements and Options

As noted above, the deficit produced in the first year of operations results in a start-up funding requirement of \$55,000, based on the stated assumptions within the model.

Subject to the necessary interest and commitment from potential advisor members, several options could be explored to secure this capital requirement, including (but not limited to):

- A foundation share issue, whereby intending Tier 2 members contribute funds for preference shares – for example, 100 shares @ \$550
- Industry or government funding contributions/training grants
- Crowd funding
- Loan capital
- A combination of the above methods, including matching funds with industry sources such as RDC's and the Future Drought Fund

4.3.3.8. Risk Analysis

As with any new business financial forecast, the above projections are subject to multiple variables and assumptions, which may not be borne out in practice. There are multiple sources of risk, and the ability of the organization to co-exist alongside existing advisor networks also needs to be considered. The most significant identified risks fall into the broad categories of market risk, operational risk and financial risk as detailed in Table 21, together with an assessment of their potential impact and options for mitigation within the proposed model approach.

Table 21: Risk Analysis

Risk Category	Risk Identified	Likelihood	Impact	Potential Outcomes	Mitigation options
Market	Tier 1 perceived to duplicate existing advisor organisations = lack of interest /participation in Tier 1 General Advisor membership	Low-medium	Medium	<ul style="list-style-type: none"> May curtail range of events and resources available, and also reduce pool of potential Tier 2 members 	<ul style="list-style-type: none"> Focus on a restricted service offering (number of events) but maintain focus on event quality and professional linkages to still deliver value to a smaller membership group. Focus on specific regions with stronger demand.
	Tier 2 membership value not clear or members lack trust = lack of interest /participation by Advisors in Tier 2 membership	Medium-High	High	<ul style="list-style-type: none"> Limited networking and co-working occurs, collaboration limited to exclusive group, less demand for services. Networks likely to function informally, reduces role for organisation but still potentially valuable for members. 	<ul style="list-style-type: none"> Scale back support service offering and co-working/tender support resources to match demand – flexible staffing model essential. Focus of organisation reverts to training/resources/event organisation instead of facilitating collaboration and client referrals.
	Tier 2 membership numbers decline over time as advisors discover compatible colleagues and develop networks independently	Medium	High	<ul style="list-style-type: none"> Tier 2 members revert to Tier 1 membership to preserve access to resources Collaboration takes place externally. 	<ul style="list-style-type: none"> Aim to deliver value through other channels such as high-quality support and coordination services at a competitive cost, to preserve member involvement. Alternatively, scale back support service offering and co-working/tender support resources to match demand.
	Limited market appetite for support packages	Medium	Low	<ul style="list-style-type: none"> As margin on package delivery is low, limited financial impact – resources could be scaled back 	<ul style="list-style-type: none"> Ensure that the organisation is well-established and that a clear need for these services is identified by members before deploying resources.
	Limited appetite for Producer memberships due to caution re advisor compatibility/skills	High	Medium-High	<ul style="list-style-type: none"> Reduced revenue from Producer memberships If reduced options for new client lead generation – potential decline in Tier 2 membership 	<ul style="list-style-type: none"> Offer producers access to some events, resources and support services to broaden the value proposition Facilitate producer-advisor collaboration on projects Pilot program for small group of producers initially (subsidised) Provide advisor reviews/referees to assist producer confidence and willingness to engage

Operational	Difficulty in sourcing staff with the required range of skills and flexibility	Medium-High	High	<ul style="list-style-type: none"> Poor member experience in terms of event management, project and tender support, and coordination – resulting in loss of members 	<ul style="list-style-type: none"> Consider a range of resourcing options – e.g. professional association and conference managers, contracting services from existing advisor organisations and providers of secretariat services Staged introduction of new activities and products
	Variable levels of volunteer commitment and motivation from management committee and sub-committees	Medium	Medium-High	<ul style="list-style-type: none"> Governance and organisational oversight compromised Event management impacted Lack of direction and leadership Staff frustration and disillusionment Conflict between paid and unpaid contributors 	<ul style="list-style-type: none"> Start small in terms of scope of activity and geographic spread, learn from early activities before expanding Founding members need to be highly motivated, with a realistic understanding of the commitment involved Participation and accountability expectations need to be clearly communicated Share the load – seek help across a range of members for specific tasks Seek in-kind support/coordination input from industry organisations and leverage or co-brand existing industry activities
Financial	Income lower than forecast and pattern of income unpredictable	Medium-High	High	<ul style="list-style-type: none"> Liquidity impacted Scale of operations curtailed – reduces organisation attractiveness 	<ul style="list-style-type: none"> Flexible funding arrangements Worst-case scenario budgeting - ensure sufficient start-up funding for two years Start small in terms of scope of activity and geographic spread, leverage other industry activities to reduce event costs initially
	Cost of service provision is higher than budgeted if multiple providers involved	Medium-High	High	<ul style="list-style-type: none"> Liquidity impacted Scale of operations curtailed – reduces organisation attractiveness 	<ul style="list-style-type: none"> Flexible funding arrangements Proactive procurement and budgeting Review range of services provided Review membership fees and willingness to pay

In summary, many of the risks detailed in Table 21 arise from uncertainty regarding

- The level of genuine appetite for a fee-based collaborative organisation amongst advisors
- Whether this appetite translates into willingness to commit volunteer time and effort into setting the organisation up with a solid foundation
- Whether advisors can develop a sufficient level of trust and confidence in fellow members to overcome geographic, age or other barriers to facilitate widespread co-working and collaboration within the organisation
- Whether producers would be willing to participate in network-building and develop trust in advisors where no previous relationship exists

These are significant questions, which need to receive positive endorsement and commitment from a wide range of advisors and producers if the concept is to succeed, even in a modified form. Whilst the initial reaction from the surveyed population and focus groups has been positive, it is important to remember that this group was self-selecting and a degree of bias towards the concept of a co-operative organisation is likely.

Questions regarding the mix of products and services, the timing of service introduction, the optimal mix of providers and financing options are all resolvable, but only if the overall concept has sufficient support and commitment from participants.

5. Conclusion

5.1 Key findings

Desktop Gap Analysis

- A significant proportion of livestock producers nationally have been identified as having no access, or only limited access, to locally-based advisory services. In total, more than 15,000 producers or approximately 20% of all producers nationwide fall into this category, when those with ready access to services in adjacent regions are excluded.
- Note that these producers may still be accessing useful and relevant advice from providers located at some distance from their operations, via remote/online access.
- Producers in under-serviced regions are also less likely to be able to access a full suite of advisory services, encompassing technical and financial advice alongside a range of group training, field days and demonstrations.
- In excess of 45% of livestock producers in every State can potentially access the full range of services within their region, with the exception of the NT. Victoria has the highest proportion of producers in this category (82%), followed by Queensland (76%) and South Australia (63%).
- Analysis has confirmed previously held views and anecdotal reports of specific gaps in terms of service provision, particularly in far north Queensland, the NT, northern Western Australia and the western/rangeland regions of NSW and South Australia

Survey and Focus Group Findings

- Through both survey and focus group activity, advisors communicated there is little drive from potential new entrants to establish themselves in independent advisory businesses, due to the uncertainty around developing a client base that would ensure financial stability.
- For both established advisors and recent entrants, establishing a large enough client base was the major concern in expanding their business. Recruiting and managing staff was a key challenge, acknowledging the people management and administrative skills required for this to occur successfully.
- The main motivations to join a cooperative were confirmed as being able to access new networks, resources, and potential clients. Secondary, was a desire to provide and receive mentoring.
- There was some reluctance to sign up for a cooperative model that may result a negative cultural fit or where the cost: benefit wasn't clear. Potential admission of corporate/commercial members also raised concerns in terms of cultural fit.
- The barriers (for both new entrants and established advisors) to entering a cooperative were both the cost and time commitment required – however the indicated ranges of both time commitment and financial investment were higher than expectations.
- In addition, respondents to both survey and focus groups acknowledged the risk in finding and working with others according to a cultural fit, that may impact on the ability to network or mentor others well; as well as the potential messaging it may send to clients.
- Regardless of the cooperative model itself, there was significant interest and goodwill from participants to further explore how a national network of livestock advisors could operate to share skills, expertise and resources. New opportunities for collaboration and networking on both a regional and national level were viewed positively.
- The potential for producer memberships in a co-operative model enabling access to a wider range of advisory services received only cautious support from producers, with concerns raised regarding suitability and quality of advice, given the importance of personal relationships and regional knowledge to farm businesses.
- Producer respondents also indicated that an advisor's participation in a cooperative would not impact their decision to work with them. As such, any advisor hoping to use the organisation of a cooperative to build a client base would likely be unsuccessful.
- The value proposition of a cooperative for producers may initially be found in accessing training and regionally specific events. Through mutual networking, evidence of mentoring, and the advanced expertise available to producers; a cooperative based advisor may gain work from a producer member after developing a relationship based on trust.

Business Model Development

- Examination of existing successful models as well as the survey and focus group responses identified that a potential collaborative organisation for advisors needs to be independent, member-driven, reputable and based on trust.
- In seeking to develop a model which does not compete with existing offerings, and which offers an extended range of services to meet some of the identified advisor needs, the analysis suggests that income generated from the provision of training/upskilling and professional development opportunities alone is unlikely to cover the costs of provision, unless external funding and volunteer input is sourced, or member numbers and participation are higher than model estimates.
- A relatively high degree of market penetration is required to ensure viability for a tiered membership organisation post the start-up phase (circa 30% of the identified national advisor population).
- To generate positive earnings, a tiered membership model needs to progress rapidly to introduce a wider range of services, and to attract significant numbers of both advisors and producers to higher-cost fee categories, over and above the base membership category. The likelihood of this occurring in practice is determined by several key success factors, including
 - The degree of commitment, leadership and innovation within the founding member group
 - The ability to ensure member compatibility and commitment to service standards
 - The willingness of the membership group to develop a degree of trust and a collaborative approach across regional and industry divides, to create networks and foster opportunities
 - The quality of support staff/services and the ability to maintain business flexibility
- The most significant risks identified arise from uncertainty regarding advisor appetite for a fee-based collaborative organisation, and their willingness to commit time, develop trust and facilitate collaboration and co-working
- Positive endorsement and commitment from a wide range of advisors and producers is required if the concept is to succeed, even in a modified form
- Subject to receiving sufficient expressions of interest, the tiered membership model could initially be developed as a staged pilot/prototype, before expanding across multiple regions. Suggested criteria for the prototype would involve a region or State which:
 - Is not currently well-served in terms of advisor networks
 - Has a committed population of advisors working in a wide range of employment/business contexts (>50 to provide critical mass for participation)
 - Has a strong level of producer demand for services (potentially facilitating the introduction of producer members at a later date)
- Based on the desktop analysis as well as survey and focus group findings, potentially suitable regions for prototype development would include:
 1. Central/Southern Qld and Fitzroy Basin
 2. Central West/Tablelands/Northern NSW
 3. Riverina/Murray regions NSW plus northern Victoria
- Regionally-based networking groups drawing upon a smaller pool of participants represent a feasible alternative to the tiered membership approach, but are likely to rely more heavily

upon volunteer (unpaid) commitment, and to be more restricted in terms of the scale and scope of events and services offered to members.

- There is potential application for the regional group approach in certain regions of Australia with distinct operating and industry environments, such as Western Australia or far North Queensland and the Northern Territory. This arises due to the combination of limited advisor numbers (conducive to a closer-knit group relying on informal networking) and the very distinctive features of their environments and production systems, which require specific solutions and skills.
- Should these more remote regions demonstrate the necessary commitment and interest in establishing regional networking groups, the experience of the SALC group in establishing and developing a highly successful networking, professional development and advocacy group would be extremely valuable. Subject to their capacity and willingness to participate, it would be logical to involve SALC in any further development of the regional group concept.

5.2 Benefits to industry

The study has confirmed that livestock advisors working in multiple contexts are eager to overcome professional isolation and share knowledge, experiences and technical resources with others. There is strong evidence to suggest that the ability to network, ask for help, and obtain honest and relevant business advice from people in a similar situation is highly valuable to advisors, many of whom operate as sole traders. Given the relatively small pool of established practitioners, the impact of advisor business failures or career changes away from advisory work can be significant for the red meat sector, particularly in more remote areas. Mechanisms for both personal and business support, as explored in this study, should be prioritised, as a means of assisting new entrants and maintaining the viability and enthusiasm of existing practitioners.

Focus group work revealed an expectation from producers that advisors should maintain professional development standards as well as an extensive network of experts, yet lack of time and resources/necessity to earn income was cited as a major reason for advisors' non-participation in training and professional development activities. Deficiencies in training and upskilling for advisors have serious implications for the red meat industry, as advisory clients may not have access to up-to-date information and research findings, or may not be sufficiently challenged or stimulated. This situation is likely to worsen over time, given the ongoing reduction in public extension services and reliance upon private providers, many of whom are operating at capacity. Both the advisor and their client are likely to benefit from improved networks, upskilling and access to resources, but there is a clear need for training and networking opportunities which are perceived by advisors to add genuine value to their businesses, over and above the financial impact of attending.

A collaborative advisor model has been demonstrated to offer multiple business benefits including business promotion, access to opportunities, diversification of income streams, keeping up to date with industry programs, and the ability to draw upon different skillsets to run courses or deliver projects. If this approach can be developed and implemented on a wider scale, it could enable new entrants to upskill and gain both confidence and technical proficiency with guidance from more experienced professionals, thus improving their chances of long-term participation in the industry. In turn, co-working options may enable established advisors or those nearing retirement to change the balance of their workload and potentially prolong their careers, whilst offering the opportunity to

“give back” through mentoring and involvement in industry projects. In both cases, the skills base available to the red meat sector is likely to be enhanced in both the short and long term.

6. Future research and recommendations

The interest from advisors in developing and maintaining a network of peers was resounding, and the opportunity for increased networking, industry level mentoring and peer to peer learning needs further attention. As a starting point, it is strongly recommended that MLA, potentially working with other RDC's, continues to explore options to expand the existing Livestock Advisor Network, drive engagement with participants in capacity building programs, and support opportunities for advisor-driven forums for professional development and networking, beyond existing technical updates.

The insights shared by the producer focus group participants provided useful insights into the areas of training, skills and resources that are considered valuable in their decision making when appointing an advisor to consult with, or provide services to, their business. Further market research with a wider range of producers across multiple regions would be valuable to explore how to promote or provide respected credentials to advisors, which could potentially improve the confidence of producers in potential service providers.

In terms of an advisor co-operative, there are two potential strategies which are likely to be applicable in different regions:

1. Expansion of the Regional Group networking approach in regions with small numbers of advisors/specific industry needs, as above (such as Western Australia, or north/west Queensland and the NT).
2. Development of a multi-region tiered membership model offering enhanced service provision and collaboration opportunities, built on a common base of networking events and professional development.

Importantly, these strategies can be developed in parallel and potentially operate in combination over time. For example, a geographically dispersed regional advisor group could focus their efforts upon online training events and resource sharing at a low cost, without requiring access to business support services. This regional group could also become affiliated with a national body, which could provide a forum for more formal professional development and resource sharing, as well as wider collaboration and mentoring opportunities.

In exploring the potential for either strategy with specific regional or interest groups, consultation with advisors should extend beyond the testing of the concept, to provide clear details about the resources which would realistically be required to develop a tiered membership organisation across multiple regions. As an alternative, the time and financial commitment associated with smaller-scale regional networking groups should also be made clear, drawing upon precedent examples. Subject to their capacity and willingness to participate, it is strongly recommended that the experience of SALC be drawn upon when exploring the potential for further regional networking groups. It is also recommended that concrete expressions of interest be required before investing significant resources, given the importance of member participation and commitment.

Subject to receiving sufficient expressions of interest, and depending on the geographic distribution of interest, the tiered membership model could initially be developed as a staged pilot/prototype. Suggested criteria for the prototype would involve a region or State which:

- Is not currently well-served in terms of advisor networks
- Has a committed population of advisors working in a wide range of employment/business contexts (>50 to provide critical mass for participation)
- Has a strong level of producer demand for services (potentially facilitating the introduction of producer members at a later date)

Based on the desktop analysis as well as survey and focus group findings, potentially suitable regions for prototype development would include:

4. Central/Southern Qld and Fitzroy Basin
5. Central West/Tablelands/Northern NSW
6. Riverina/Murray regions NSW plus northern Victoria

However, the first and most important priority for establishment of a pilot project would be the level of interest and support from potential advisors within a region.

The pilot approach has the advantage of providing a limited-scale “testing ground” with a group whose commitment is indicated at the outset, and where capacity exists to support a meaningful number of events as well as potential service expansion. A pilot program also reduces the extent of financial exposure, as the scale of networking and training events can be matched initially to available funds. After 12-18 months of operation, the cost structure associated with the provision of training and networking opportunities should be well established, and the implications for fee structures will become apparent. At this stage, the demand for service expansion should be able to be determined with greater certainty and a business case prepared, prior to the introduction of higher tiers of service provision and support.

Should it become apparent that the appetite for higher levels of service provision and co-working support is limited, then at least the pilot project should still have developed an improved means of delivery for member-driven networking and training events.

If the organisation can be successfully established as a pilot, with appropriate management and governance processes in place, expansion to other regions becomes feasible as the market develops. This could take the form of transformation into a national body (as has occurred with Crop Consultants Australia) or the setup of several regional sub-groups which feed into a national coordinating body.

Consideration also needs to be given to avoiding duplication or fragmentation of advisor offerings as the prototype is established. For example, MLA would need to consider how its existing Livestock Advisor Network group would function alongside the prototype, and how to best support the emerging model alongside existing groups.

Should the market, operational and financial risks involved in the tiered membership model prove too great upon further investigation, there is still a strong desire from several advisors across the nation to have a network with other advisors. There is a need for an advisor network that encourages the

development of professional skills, knowledge base, and general networks; limits the effects of isolation through an opportunity for mentoring, sharing of experiences, and other professional support; or the possibility of working towards business transition through association with others in network. A cooperative for networking alone is unlikely to be financially viable without significant volunteer input or external funding, however at a minimum it is recommended that some consideration is given to a means of supporting a national network of advisors. With some facilitation, which may be at an industry level, establishing a network may organically address some of the abovementioned elements outlined in this study.

7. References

- | | |
|---|--|
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8. Appendices

8.1 Appendix A

Please refer to attached excel file 'J23652 Appendix A Extract'.

8.2 Appendix B - Advisor Survey Raw Data

Q1 What is/are the main region(s) you service? (tick all that apply) (The following regions are based on nationwide NRM regions)

Answered: 74 Skipped: 0

Answer Choices	Responses	
ACT - Australian Capital Territory	5.41%	4
Marine & Coastal - OceanWatch Australia	0.00%	0
NSW - Central Tablelands	13.51%	10
NSW - Central West	16.22%	12
NSW - Greater Sydney	4.05%	3
NSW - Hunter	6.76%	5
NSW - Murray	10.81%	8
NSW - North Coast	5.41%	4
NSW - North West	14.86%	11
NSW - Northern Tablelands	10.81%	8
NSW - Riverina	21.62%	16
NSW - South East	13.51%	10
NSW - Western	13.51%	10
NT - Territory	14.86%	11
QLD - Burnett Mary Regional Group	8.11%	6
QLD - Cape York	4.05%	3
QLD - Desert Channels Queensland	10.81%	8
QLD - Fitzroy Basin Association	13.51%	10
QLD - Gulf Savannah	9.46%	7
QLD - Healthy Land & Water	5.41%	4
QLD - North Queensland Dry Tropics	13.51%	10
QLD - Reef Catchments	9.46%	7
QLD - Southern Gulf	10.81%	8
QLD - Southern Queensland	18.92%	14
QLD - Terrain	2.70%	2
QLD - Torres Strait Regional Authority	1.35%	1
SA - Alinytjara Wilurara	2.70%	2
SA - Eyre Peninsula	6.76%	5
SA - Green Adelaide	4.05%	3
SA - Hills and Fleurieu	10.81%	8
SA - Kangaroo Island	8.11%	6
SA - Limestone Coast	14.86%	11
SA - Murraylands & Riverland	10.81%	8
SA - Northern and Yorke	10.81%	8
SA - South Australia Arid Lands	10.81%	8
Tas - Cradle Coast	5.41%	4
Tas - NRM North	9.46%	7

Tas - NRM South	10.81%	8
Vic - Corangamite	10.81%	8
Vic - East Gippsland	10.81%	8
Vic - Glenelg Hopkins	10.81%	8
Vic - Goulburn Broken	9.46%	7
Vic - Mallee	5.41%	4
Vic - Melbourne Water	2.70%	2
Vic - North Central	12.16%	9
Vic - North East	14.86%	11
Vic - West Gippsland	8.11%	6
Vic - Wimmera	6.76%	5
WA - Northern Agricultural Catchments Council	6.76%	5
WA - Peel-Harvey Catchment council	2.70%	2
WA - Perth	5.41%	4
WA - Rangelands	13.51%	10
WA - South Coast	8.11%	6
WA - South West	8.11%	6
WA - Wheatbelt	10.81%	8

Q2 Which of the following red meat production types do you do you provide services or advice to?
(tick all that apply)

Answered: 74 Skipped: 0

ANSWER CHOICES	RESPONSES	
Beef	93.24%	69
Sheep meat	72.97%	54
Goat	22.97%	17
Other (please specify)	5.41%	4
Total Respondents: 74		

#	OTHER (PLEASE SPECIFY)	DATE
1	Sheep wool	5/6/2025 5:26 PM
2	Wool	5/6/2025 10:02 AM
3	Dairy	5/2/2025 6:29 AM
4	both sheep and beef	4/29/2025 3:55 PM

Q3What services do you offer to red meat producers?

Answered: 65

Skipped: 9

#	RESPONSES	DATE
1	Drone Multispectral scans & mapping of pasture health also for cropping	5/17/2025 2:04 PM
2	Connect producers to services such as nutrition advice, feed testing, genetics, mapping, business planning etc.	5/14/2025 10:58 AM
3	Breeder management Cattle nutrition Genetics and animal selection Business analysis Marketing Grazing management	5/14/2025 10:01 AM
4	Beef extension - GLM, Pastures, Business, Production, Genetics	5/13/2025 9:57 AM
5	Access to advice on sustainable agricultural practices and management of natural capital. Financial support opportunities to accelerate and de-risk adoption of new practices.	5/12/2025 4:10 PM
6	Broad extension services for pastoralists and the NT cattle industry	5/10/2025 7:12 PM
7	Pasture and grazing plans, parasite testing and control, nutrition rations and feed budgeting, reproductive and genetics advice, EID management, animal health advice	5/8/2025 3:48 PM
8	Training, group facilitation and farm advisory. Specialise in sheep repro, grazing management, farm management and future planning. Don't really do much one on one - more project based work.	5/7/2025 11:30 AM
9	Breeding selection, management advice	5/6/2025 7:50 PM
10	veterinary services	5/6/2025 5:26 PM
11	Nutrition (ration formulation and supplement advice), disease prevention, non-infectious disease management, improving conception rates and lamb survival, production planning/management (e.g. matching calving to paddock feed or reducing joining length etc), parasite management, fit to join.	5/6/2025 1:58 PM
12	Animal Health Nutrition Advisory support	5/6/2025 1:52 PM
13	Predominately livestock extension	5/6/2025 10:02 AM
14	Nutrition, genetics, Carbon, regeneration ag.	5/5/2025 2:36 PM
15	- Grazing management - Technologies that assist with grazing and land management	5/5/2025 9:54 AM
16	Business planning, feasibility analysis, benchmarking, succession planning, gross margins	5/2/2025 2:22 PM
17	advisory and extension of livestock health and husbandry, best practice production advice	5/2/2025 9:29 AM
18	pasture - chemical, nutritional advice. Grazing management, Cultivar selection, animal health advice, genetic selection	5/2/2025 6:29 AM
19	Business coaching, succession planning	5/1/2025 8:27 PM
20	Research and extension activities.	5/1/2025 5:42 PM
21	Extension of research	5/1/2025 11:58 AM
22	Farm planning and performance Bank advocacy	5/1/2025 10:10 AM
23	Extension activities/advice and financial assistance for improving management practices and land condition.	5/1/2025 10:04 AM
24	Pasture Agronomy specialist. Farmer group coordination and training, pasture agronomy advice, soil testing and fert recs., grazing management and feed budgets. Agricultural inputs such as seed, fertiliser, soil probes and weather stations.	5/1/2025 7:57 AM
25	Learning experiences and opportunities to engage and network with other farmers.	5/1/2025 5:42 AM

	Benchmarking.	
26	Business advisory and strategy	4/30/2025 7:45 PM
27	Pasture agronomy advice, matching feed supply and demand, emissions accounting	4/30/2025 5:23 PM
28	Farm Management & Consulting Benchmarking Cash Flow Budgeting	4/30/2025 3:00 PM
29	Grazing Land Management and Sustainable Agriculture connections	4/30/2025 12:59 PM
30	Animal production- nutrition, animal health, grazing management advice	4/30/2025 12:19 PM
31	Nutrition and Animal Health advice, extension programs	4/30/2025 11:42 AM
32	Total Farm & Livestock Management / Farm Purchasing Assessments / Life & Business Planning / Training Workshops	4/30/2025 10:53 AM
33	agronomic advice, grazing management	4/30/2025 10:27 AM
34	Pasture and fodder agronomy	4/30/2025 6:06 AM
35	Data collection and analysis services with particular focus on genetics and utilising data for better selection of breeding animals and culling decisions	4/30/2025 12:18 AM
36	Advice on pasture and forage options to promote productive meat production, with a focus also on nutrition and systems management, along with a strong agronomy background	4/29/2025 8:13 PM
37	Property Development Pasture And Crop Agronomy Grazing Management Soil Nutrition Weed Management Decision Making Advice	4/29/2025 5:37 PM
38	Farm business planning, grazing management, animal health, nutrition, feed budgets	4/29/2025 5:17 PM
39	On farm advice	4/29/2025 5:15 PM
40	Facilitate producer groups eg LTEM, HFP. One on one nutritional and animal health consulting.	4/29/2025 5:03 PM
41	Market advice, breeding objectives and business management	4/29/2025 4:26 PM
42	Grazing Fundamentals workshops, carrying capacity calculations, burning plans, weed plans, plant identification, establishment of photo monitoring sites.	4/29/2025 4:08 PM
43	Land management advice through tailored land management plans and workshops. Looking at properties holistically, this can include pasture management, improved pasture species, property mapping, herd management, goal setting, land type mapping, infrastructure planning, regenerative agricultural practices, erosion management, connecting land managers with other service providers.	4/29/2025 3:59 PM
44	Veterinary Services Livestock Health and Nutrition Consultancy Services	4/29/2025 3:57 PM
45	Extension national training programs	4/29/2025 3:55 PM
46	Leadership and communication	4/29/2025 3:53 PM
47	Group facilitation, coordination, project management	4/29/2025 3:42 PM
48	Sheep and beef cattle production advice and economics.	4/29/2025 12:32 PM
49	Breeding programs for premium Wagyu beef from both the dairy and beef industries.	4/29/2025 12:18 PM
50	WEC, non-mules systems consultation, classing/scoring, drench/lice/fly chem rotation management, pasture/nutrition management.	4/29/2025 9:08 AM
51	Whole of industry experience	4/27/2025 2:48 AM
52	Group facilitation for beef and sheep producers: financial benchmarking, beef and sheep nutrition, genetics, reproduction and value chain- understanding carcass feedback and improving compliance to market specifications.	4/24/2025 8:48 AM
53	Grazing land management and property development	4/22/2025 11:57 AM
54	Nutrition, agronomy and animal health advice	4/22/2025 8:40 AM
55	Vet BAsed consulting	4/20/2025 3:36 PM

56	Sustainability and carbon	4/18/2025 2:34 PM
57	Veterinary services Livestock nutrition services Livestock production	4/18/2025 6:42 AM
58	Agronomic, production, nutrition genetics, agtech, financial planning and analysis.	4/18/2025 12:00 AM
59	Strategic advisory - grazing, production system, agribusiness consulting, pasture agronomy, capacity building workshops	4/17/2025 9:29 PM
60	Satellite pasture, ground cover and land condition monitoring. Forage Budgeting.	4/17/2025 7:53 PM
61	n-farm technical support to red meat producers, focusing on cattle selection, breeding advice, feedbase management, and business planning. Services include bull and heifer selection, EBV interpretation, reproductive and genetic strategy development, dry season and forage budgeting, as well as producer training workshops	4/17/2025 4:11 PM
62	Helping small producers and hobby farmers understand compliance around PIC, NLIS, LPA practices nationwide	4/17/2025 3:15 PM
63	Whole of farm family business consulting, people, land health and natural capital and financial.	4/17/2025 2:55 PM
64	Advisory on production, nutrition and pastures. Delivery of training courses (eg Prograze, Landscan)	4/17/2025 2:53 PM
65	Animal health/veterinary, nutrition, pasture management	4/17/2025 2:53 PM

Q4: What are the main services offered by other advisory business to red meat producers in your region?

Answered: 60

Skipped: 14

#	RESPONSES	DATE
1	Giving farmers full visual maps that gives them valuable insites & conformation of their current health (or not) of pastures, from scans & mapping of pasture. This also great to work with agronomists & give this information to them & we can together to assist the farmers with their boots on ground & expertise in pasture management	5/17/2025 2:04 PM
2	Business analysis Business planning Herd management Grazing management Property development Succession	5/14/2025 10:01 AM
3	NRM - GLM reef funding and associated extension, MLA Edge courses, RCS GFP, AgForce - chem cert	5/13/2025 9:57 AM
4	Production efficiency, business & finance, pasture/cropping/soils, pest control, carbon and environmental markets, succession planning,	5/12/2025 4:10 PM
5	Business management advice, NRM, cropping advice/agronomy	5/10/2025 7:12 PM
6	The same - there's just very few advisors in my area compared to the demand from producers.	5/8/2025 3:48 PM
7	similar to mine - some offer one on one advice	5/7/2025 11:30 AM
8	Rangelands pasture management, beef nutrition, vet services, and other main services and research	5/6/2025 7:50 PM
9	Huge number - lay pregnancy testers, livestock and agronomy advisors, other vets, repro vets	5/6/2025 5:26 PM
10	Nutrition, parasite advice, genetic selection advice, veterinary consultancy, LTEM	5/6/2025 1:58 PM
11	Consultancy/advisory Nutrition Animal Health	5/6/2025 1:52 PM
12	There are not other livestock advisors in my region, it is serviced by people from intra and inter state	5/6/2025 10:02 AM
13	IT, agronomy,	5/5/2025 2:36 PM
14	- Everything.	5/5/2025 9:54 AM
15	Livestock nutrition, gross margins	5/2/2025 2:22 PM
16	contract husbandry and veterinary work, advisory & extension, sales	5/2/2025 9:29 AM
17	ababab	5/2/2025 6:29 AM
18	nutrition, feed management, agronomy	5/1/2025 8:27 PM
19	Private consultants, stock agents, farmer groups providing extension activities,	5/1/2025 11:58 AM
20	Farm planning Animal health Nutrition Lamb survival Individual animal management Data management Benchmarking Succession planning Grazing management	5/1/2025 10:10 AM
21	Extension, research, planning	5/1/2025 10:04 AM
22	Local vets provide animal health advice. Contractors who provide tractors and sowing equipment also provide what they think is right and fertiliser and 'alternatives' sales people give advice and recs. on their products.	5/1/2025 7:57 AM
23	Finical literacy, vet services succession planning - but limited service providers	5/1/2025 5:42 AM
24	All aspects of production and business	4/30/2025 7:45 PM
25	Don't understand the question	4/30/2025 5:23 PM

26	Farm Management & Consulting	4/30/2025 3:00 PM
27	Business sustainability, agronomy, Grazing Land Management	4/30/2025 12:59 PM
28	As above	4/30/2025 12:19 PM
29	Nutrition and Animal Health advice, extension programs	4/30/2025 11:42 AM
30	Farm & Livestock Management	4/30/2025 10:53 AM
31	as above, farm economics, livestock production and health	4/30/2025 10:27 AM
32	Herd health, agronomy	4/30/2025 6:06 AM
33	Holistic farm consulting with more of a focus on economics and profitability; sheep sale agents etc	4/30/2025 12:18 AM
34	Breeding and selections, agronomy, fertiliser , general consultancy	4/29/2025 8:13 PM
35	Agribusiness Agronomy Government Pasture and Beef Production advice Nutrition	4/29/2025 5:37 PM
36	Similar plus agronomy and farm finance	4/29/2025 5:17 PM
37	pasture and livestock breeding	4/29/2025 5:15 PM
38	Same plus financial benchmarking and brokering with financial institutions	4/29/2025 5:03 PM
39	GLM	4/29/2025 4:26 PM
40	Same as above and Beef Nutrition, Business Management,	4/29/2025 4:08 PM
41	Pasture agronomy, business analysis, herd analysis, regenerative agricultural practices	4/29/2025 3:59 PM
42	Agronomy/ Soil Health, Nutritionists, lots of tech businesses (e.g. drone spraying)	4/29/2025 3:57 PM
43	consultancy, vet, tafe	4/29/2025 3:55 PM
44	One to one feedbase and nutrition consulting, business consulting	4/29/2025 3:42 PM
45	Benchmarking, although it's rort with bias.	4/29/2025 12:32 PM
46	Nutrition Health Stockfeed Genetics	4/29/2025 12:18 PM
47	Benchmarking, farmer support, economic decision making support - too numerous to run through the rest.	4/29/2025 9:08 AM
48	Similar	4/27/2025 2:48 AM
49	One on one consultancy - nutrition services, animal health plans (veterinary consulting), farming systems groups, financial and business planning, genetics services, reproductive technologies, producer demonstration sites, discussion groups and in-farm trials. Currently plenty of dry times and Agrisilience programs for drought conditions.	4/24/2025 8:48 AM
50	Sown pastures development, business management, business planning, herd management	4/22/2025 11:57 AM
51	Benchmarking, animal health advice.	4/22/2025 8:40 AM
52	worm plans , nutrition, product sales	4/20/2025 3:36 PM
53	Everything	4/18/2025 2:34 PM
54	Unsure you'd have to ask them	4/18/2025 6:42 AM
55	Agronomic, production, genomics, financial and nutrition.	4/18/2025 12:00 AM
56	Sales agronomy	4/17/2025 9:29 PM
57	Bull selection; replacement female selection; enterprise benchmarking; agronomic	4/17/2025 4:11 PM
58	Getting out conducting workshops and online groups	4/17/2025 3:15 PM
59	Mainly technical and production advice.	4/17/2025 2:55 PM
60	Agronomy, benchmarking	4/17/2025 2:53 PM

Q5 What type of services do you believe need to be offered by advisors to address the needs of red meat producers in the region that currently are not available to them?

Answered: 59

Skipped: 15

#	RESPONSES	DATE
1	As above, pasture assessment, this information can be put into a program assessed & transfer the file into a spray drone or spreading drone to improve the specific areas that need attention & less or none in the places that don't need it.	5/17/2025 2:04 PM
2	Pasture development Genetics and animal selection Cattle nutrition Breeder management Beef business economics and analysis	5/14/2025 10:01 AM
3	Ongoing one-on-one or group support rather than a one off technical expert.	5/13/2025 9:57 AM
4	Landscape system functionality – how it all interconnects	5/12/2025 4:10 PM
5	Training in the role (specific to region/industry), mentoring/support from experienced advisors, coordination of extension/advisory efforts, better on-boarding so new staff don't have to figure out things for themselves and rebuild relationships with clients from scratch	5/10/2025 7:12 PM
6	Particularly now and in SA - whole farm drought planning and recovery from drought programs.	5/8/2025 3:48 PM
7	carbon farming/accounting, farm succession and future planning. Always going to be a demand for productivity and profitability improvement with in a natural resource management context.	5/7/2025 11:30 AM
8	None	5/6/2025 5:26 PM
9	Better advisory on how to manage disease/prevent disease -> poor communication from vets post brucellosis outbreak - farmers need help and confidence to wean early not because of drought and how to get back to normal system Very minimal cattle advisory - need help with pink eye, pestivirus, ideal calving, getting back in calf etc, most advisors in area don't know cattle	5/6/2025 1:58 PM
10	Processing options to maximise return on investment Access to feed commodity contacts within their respective regions especially in times of drought	5/6/2025 1:52 PM
11	upskilling in technical knowledge writing for producers presenting for producer audience	5/6/2025 10:02 AM
12	Carbon farming.	5/5/2025 2:36 PM
13	- Improving pastures and profitable and efficient utilisation.	5/5/2025 9:54 AM
14	Feed monitoring and analysis	5/2/2025 2:22 PM
15	More on ground/tailored advice to specific businesses - small scale producers get left behind	5/2/2025 9:29 AM
16	I think that are available but the no of service providers available pasture - chemical, nutritional advice, Grazing management, Cultivar selection, animal health advice, genetic selection	5/2/2025 6:29 AM
17	business literacy, business process	5/1/2025 8:27 PM
18	Follow up sessions after workshops with consultants to accelerate on farm adoption	5/1/2025 11:58 AM
19	None - it's all there	5/1/2025 10:10 AM
20	Fire management - NOT just hazard reduction management but knowledge and capacity building around holistic land management and how incorporating fire can assist in creating a more resilient and profitable system when done correctly. There's not only a shortage in skilled practitioners but appropriate advice being provided to land holders. Generalised Regional Ecosystem recommendations aren't accurate (or property specific) and can have an adverse outcome for landholders.	5/1/2025 10:04 AM

21	They can probably access most services if they search it out, but some are happy where they are.	5/1/2025 7:57 AM
22	Final literacy, business planning, bank navigation, succession planning	5/1/2025 5:42 AM
23	All currently available in immediate region, the question is what is needed where advisors are unavailable and matched to producer needs	4/30/2025 7:45 PM
24	Basic livestock / pasture systems	4/30/2025 5:23 PM
25	Succession Cash Flow Budgeting	4/30/2025 3:00 PM
26	As above or more on Carbon efficiencies	4/30/2025 12:59 PM
27	I think the services are available already, the challenge is uptake	4/30/2025 12:19 PM
28	Benchmarking, Genetics/Breeding (available now but limited)	4/30/2025 11:42 AM
29	none	4/30/2025 10:27 AM
30	More resource management and education on pastures/soil	4/30/2025 6:06 AM
31	Education on how data collection can lead to a more profitable and efficient enterprise despite the extra work involved	4/30/2025 12:18 AM
32	Options for filling seasonal feed gaps to meet production requirements, endophytic relationships, maximising feed conversion etc	4/29/2025 8:13 PM
33	Pasture Agronomy and Interactions with beef production Grazing land management	4/29/2025 5:37 PM
34	Technology advice. With current stock prices and good season the balance is good but in a drought or increased prices demand will increase.	4/29/2025 5:17 PM
35	The needs are covered if they choose to use them.	4/29/2025 5:15 PM
36	Bigger focus on the bottomline ie financial awareness training and willingness to participate in benchmarking	4/29/2025 5:03 PM
37	Market identification that relates to sustainable business management & growth	4/29/2025 4:26 PM
38	None, all are available	4/29/2025 4:08 PM
39	More advisors who specialise in strategic business planning and goal setting.	4/29/2025 3:59 PM
40	Non sales-based advice/ evidence based advice	4/29/2025 3:57 PM
41	animal production, pasture management	4/29/2025 3:55 PM
42	More personal development and emotional support	4/29/2025 3:53 PM
43	Succession planning	4/29/2025 3:42 PM
44	Genetics understanding, and the value of combining genotype and phenotype during classing and selection, although I offer this as standard.	4/29/2025 12:32 PM
45	Better market understanding and market fluctuation.	4/29/2025 12:18 PM
46	Unsure	4/29/2025 9:08 AM
47	All of enterprise focus from financial thru to rural suppliers, breeding thru to market targets	4/27/2025 2:48 AM
48	All of the above technical services. More mindset and business coaching and succession planning required.	4/24/2025 8:48 AM
49	Just greater coverage of what is already available. But there are not enough new advisors coming through (especially in grazing land management).	4/22/2025 11:57 AM
50	Nutrition and stress mitigation advice to improve fertility and growth rates.	4/22/2025 8:40 AM
51	Abattoir feedback	4/20/2025 3:36 PM
52	Not sure	4/18/2025 2:34 PM
53	Agribusiness- they're available but not locally	4/18/2025 6:42 AM
54	Financial services including farm management services. On farm production assessments and planning.	4/18/2025 12:00 AM
55	Grazing re. plant morphology, plant nutrition components and livestock nutrition - and how these relate to livestock production	4/17/2025 9:29 PM
56	Adoption of Agtech to support grazing management.	4/17/2025 7:53 PM
57	Most services are well provided	4/17/2025 4:11 PM
58	A co-op type of operation in each region run through key personal of the supply chain establishing best practices	4/17/2025 3:15 PM
59	More farm systems information and natural capital information, with a change focus.	4/17/2025 2:55 PM

Q6 Which of the following statements would you suggest is most accurate

Answered: 67

Skipped: 7

ANSWER CHOICES	RESPONSES	
There is a competition between advisors in the region with a limited client demand	13.43%	9
There is a competition between advisors in the region with a potentially larger 'untapped' client demand	34.33%	23
There is sufficient client demand to support all current advisors	23.88%	16
There is excess client demand beyond the capacity of current advisors to service	28.36%	19
TOTAL		67

Q7 Based on your experience would you state that livestock advisors in the regions(s) you service are more competitive or cooperative?

Answered: 64

Skipped: 10

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	5	332	64
Total Respondents: 64			
#		DATE	
1	8	5/17/2025 2:04 PM	
2	9	5/14/2025 10:58 AM	
3	4	5/14/2025 10:01 AM	
4	5	5/13/2025 9:57 AM	
5	2	5/12/2025 4:10 PM	
6	7	5/10/2025 7:12 PM	
7	3	5/8/2025 3:48 PM	
8	8	5/7/2025 11:30 AM	
9	2	5/6/2025 7:50 PM	
10	3	5/6/2025 5:26 PM	
11	8	5/6/2025 1:58 PM	
12	3	5/6/2025 1:52 PM	
13	2	5/6/2025 10:02 AM	
14	7	5/5/2025 2:36 PM	
15	5	5/5/2025 9:54 AM	
16	7	5/2/2025 2:22 PM	
17	5	5/2/2025 9:29 AM	
18	5	5/2/2025 6:29 AM	
19	1	5/1/2025 8:27 PM	

20	9	5/1/2025 5:42 PM
21	5	5/1/2025 11:58 AM
22	3	5/1/2025 10:10 AM
23	9	5/1/2025 10:04 AM
24	5	5/1/2025 7:57 AM
25	5	5/1/2025 5:42 AM
26	1	4/30/2025 7:45 PM
27	8	4/30/2025 5:23 PM
28	8	4/30/2025 3:00 PM
29	5	4/30/2025 12:59 PM
30	2	4/30/2025 12:19 PM
31	7	4/30/2025 11:42 AM
32	6	4/30/2025 10:27 AM
33	5	4/30/2025 6:06 AM
34	5	4/30/2025 12:18 AM
35	4	4/29/2025 8:13 PM
36	5	4/29/2025 7:55 PM
37	8	4/29/2025 5:37 PM
38	8	4/29/2025 5:17 PM
39	7	4/29/2025 5:15 PM
40	6	4/29/2025 5:03 PM
41	8	4/29/2025 4:26 PM
42	1	4/29/2025 4:08 PM
43	7	4/29/2025 3:59 PM
44	6	4/29/2025 3:57 PM
45	4	4/29/2025 3:55 PM
46	8	4/29/2025 3:53 PM
47	5	4/29/2025 3:42 PM
48	5	4/29/2025 12:18 PM
49	5	4/29/2025 9:08 AM
50	1	4/27/2025 2:48 AM
51	10	4/24/2025 8:48 AM
52	7	4/22/2025 11:57 AM
53	5	4/22/2025 8:40 AM
54	6	4/20/2025 3:36 PM
55	2	4/18/2025 2:34 PM
56	2	4/18/2025 6:42 AM
57	7	4/18/2025 12:00 AM
58	7	4/17/2025 9:29 PM
59	2	4/17/2025 7:53 PM
60	2	4/17/2025 4:11 PM
61	2	4/17/2025 3:15 PM
62	1	4/17/2025 2:55 PM
63	8	4/17/2025 2:53 PM
64	6	4/17/2025 2:53 PM

Q8 What characteristics of the market lead you to rate it this way?

Answered: 60

Skipped: 14

#	RESPONSES	DATE
1	I'm am here to aid & assist farmers & agronomists to work together for the best outcome for farmers	5/17/2025 2:04 PM
2	This is a very hard market to define. There is a small number of consultants who have a reasonable amount of work but there is a large number of people providing free services through DPI and NRM groups. Free service providers can be limited in the consultancy type services they can provide because they need to achieve project targets which principally are focussed on improving land condition. A lot of graziers have shown little inclination to pay for advice but the number being prepared to pay is probably increasing.	5/14/2025 10:01 AM
3	There is competition between DPI and NRMs in the Reef space as both are funded under the same program with separate targets. Collaboration is inbuilt into Livestock Resilience Program with DPI and a range of collaborator groups co-delivering.	5/13/2025 9:57 AM
4	Reductionist paradigm (break the system into small pieces) and competing products based on ideology – selling what they know/have instead of what is needed.	5/12/2025 4:10 PM
5	Very few advisors that mostly offer different services (complement eachother). If not currently working together it's likely because they don't know of eachother yet	5/10/2025 7:12 PM
6	A lot of advisors live in their own bubble and while there is scope and producer demand for advisor collaboration, it doesn't eventuate	5/8/2025 3:48 PM
7	We often work on similar programs ie LTEM and BWBL/BetterBeef so have developed relationships that allow for collaboration and cooperation as we all have seen we have different and often complimentary skills	5/7/2025 11:30 AM
8	We could work together but in reality most people keep things to themselves due to commercial reasons	5/6/2025 7:50 PM
9	Many other advisors offer free services as they are backed with funding from various bodies eg AGKI, PIRSA, government, AM etc.	5/6/2025 5:26 PM
10	I think generally they are cooperative, I think there is a shortage of highly technical advisors, however most advisors will say doesn't matter who you work with just work with someone. I also think a lot of young want to be advisors are coming up through rural merch stores dont have anyone to call to ask questions or further their knowledge. I remember as a young advisor not knowing who to call or who I could call, now having been in the advisory space for 3 yrs i know people from meeting them at industry events.	5/6/2025 1:58 PM
11	A lot of advisors don't seem to want to collaborate for the greater good of the producer and their production systems. Definitely more support and inclusiveness would help grown advisory skill sets. Something similar to the Pacific and Australasian Extension Network program could work well	5/6/2025 1:52 PM
12	There is competition between advisors for clients/projects	5/6/2025 10:02 AM
13	Everyone specialises in different aspects of livestock business so we have to work together somewhat.	5/5/2025 2:36 PM
14	I'm new to the region so still working that out!	5/5/2025 9:54 AM
15	Advisors referring business to each other with overflow of clients or advice outside their scope	5/2/2025 2:22 PM
16	There are not a lot of livestock advisors who service the area, and most also work outside of Greater Sydney. They focus on larger producers outside of the region for a greater return. Small scale producers need the attention as well. Its highly likely that people with a handful of livestock will be the cause of the next biosecurity issue due to naivety/lack of understanding so there is a large untapped market	5/2/2025 9:29 AM

17	Some people are co operative others are not so its just hard to call	5/2/2025 6:29 AM
18	not a great deal of referral between businesses	5/1/2025 8:27 PM
19	The operations of SA Livestock Consultants. As a farming systems group the input that consultants have to our projects and how they collaborate and support each other.	5/1/2025 5:42 PM
20	Very high consultancy rates for all work conducted	5/1/2025 11:58 AM
21	Limited collegiality Limited networking	5/1/2025 10:10 AM
22	Majority of advisors have landholders best interests at heart.	5/1/2025 10:04 AM
23	Sometimes people collaborate sometimes they don't.	5/1/2025 7:57 AM
24	Not enough supply and lack of culture abound producers for demand	5/1/2025 5:42 AM
25	the private sector is inherently commercially focussed whereas gov't or industry funded distorts market demand	4/30/2025 7:45 PM
26	Not enough of them. I keep refusing people because I don't have capacity	4/30/2025 5:23 PM
27	There are a number of consultants in the region (someone for everyone).	4/30/2025 3:00 PM
28	Everyone has their funding, and we are all about the longevity of the industry.	4/30/2025 12:59 PM
29	Business livelihood. Understandably so for an advisor / consultant. I think competition is fine.	4/30/2025 12:19 PM
30	Unsure what is meant by this question	4/30/2025 11:42 AM
31	Due to veery little communication between consultants, I am unable to answer No.6 or 7	4/30/2025 10:53 AM
32	interactions between advisors at various events	4/30/2025 10:27 AM
33	Around half of those I know/have met are unfriendly and unwilling to collaborate in any way, while the other half are the exact opposite	4/30/2025 12:18 AM
34	There are several strong advisory groups / businesses, but seem very generalised in their thinking, and may not be fully aware of advancements in feed options	4/29/2025 8:13 PM
35	I work closely with both Agribusiness and Government advisors as well as mentor NRM land management officers, to ensure all producer needs can be met. Not every producer is going to suit every advisor.	4/29/2025 5:37 PM
36	Because we all work together on farm and with projects	4/29/2025 5:17 PM
37	too much work to be competitive	4/29/2025 5:15 PM
38	All livestock consultants in the regions tend to belong to the SA Livestock Consultants Inc so we tend to collaborate more than compete.	4/29/2025 5:03 PM
39	Social media posts & NRM engagement	4/29/2025 4:26 PM
40	All the advisors talk and get on well, especially the MLA EDGE advisors	4/29/2025 4:08 PM
41	I don't believe there is much competition between advisors however there needs to be more connectivity between advisors to understand who to refer producers to in the local area.	4/29/2025 3:59 PM
42	Advisors themselves are not competitive and get along fairly well. There are issues with corporate interests undercutting the low hanging fruit at the expense of other professionals with the most advice and experience to offer	4/29/2025 3:57 PM
43	consultancy business dynamics and interpersonal relationships that exist between clients and their consultancy services	4/29/2025 3:55 PM
44	An understanding that a lack of trust between advisors is completely evident.	4/29/2025 12:32 PM
45	-	4/29/2025 12:18 PM
46	Trust takes time to build. Knowledge sharing does happen between consultants BUT fostering client relationships is paramount.	4/29/2025 9:08 AM
47	Highly competitive when financially incentivised	4/27/2025 2:48 AM

48	Proactive SA livestock consultants group operating in the state that fosters professional development, collaborative projects and mentoring of new and emerging entrants into the livestock industry. Please contact SALC to organise an interview with this group for this project (as per letter sent to MIA when this EOI opened).	4/24/2025 8:48 AM
49	Plenty of work to go around but there are only a few experienced advisors to deliver it. So we tend to share work around between ourselves and refer our "competitors" to clients when we can't service them due to other commitments.	4/22/2025 11:57 AM
50	Market share. I have enough to keep me busy and am quite content to have others share the spoils.	4/22/2025 8:40 AM
51	Working with other advisors and sharing info	4/20/2025 3:36 PM
52	Attitudes of the people, there is probably plenty of business out there if you knew what you were doing	4/18/2025 2:34 PM
53	Personalities of the people running the businesses. They are commercially aggressive and egotistical.	4/18/2025 6:42 AM
54	Inclusion, strong scenes of community, common goals and willingness to learn.	4/18/2025 12:00 AM
55	Private consultants seems to have a relatively good relationship with NRM/Hub/University - but limited alignment of advice between. Private consultants operate in a competitive space - for obvious reasons.	4/17/2025 9:29 PM
56	In the south advisor's are often input salesmen. In the north they a limited services	4/17/2025 7:53 PM
57	Limited opportunities to engage with groups or producers willing to pay for service. Most programs that could support independent service delivery such as MLA are limited / infrequent / or restricted to preferred deliverers.	4/17/2025 4:11 PM
58	What I'm trying to tackle there is lack of informed persons	4/17/2025 3:15 PM
59	Each person keeps to themselves too much.	4/17/2025 2:55 PM
60	We all work in together as we typically service different sectors and segments of the industry	4/17/2025 2:53 PM

Q9 What is your age?

Answered: 67

Skipped: 7

ANSWER CHOICES	RESPONSES	
20-29	8.96%	6
30-39	22.39%	15
40-49	23.88%	16
50-59	26.87%	18
60-69	16.42%	11
70+	1.49%	1
TOTAL		67

Q10 Describe your role in the business (tick all that apply)

Answered: 67

Skipped: 7

ANSWER CHOICES		RESPONSES
Owner	61.19%	41
Shareholder	4.48%	3
Employer	7.46%	5
Employee	41.79%	28
Other (please specify)	4.48%	3
Total Respondents: 67		

#	OTHER (PLEASE SPECIFY)	DATE
1	CEO farming systems group	5/1/2025 5:42 PM
2	J	5/1/2025 5:42 AM
3	NRM	4/30/2025 12:59 PM

Q11 Describe your business structure

Answered: 67

Skipped: 7

ANSWER CHOICES		RESPONSES
Sole trader	19.40%	13
Partnership	4.48%	3
Proprietary limited company	50.75%	34
Cooperative	0.00%	0
Not for profit/producer group	5.97%	4
Government department or publicly funded organisation	16.42%	11
University or publicly funded research organisation	0.00%	0
Other (please specify)	2.99%	2
TOTAL		67

#	OTHER (PLEASE SPECIFY)	DATE
1	Rural merch store	5/6/2025 2:01 PM
2	Trust	4/29/2025 7:56 PM

Q12 Are you an individual working as part of a multi-consultant advisory firm?

Answered: 66

Skipped: 8

ANSWER CHOICES	RESPONSES	
Yes	31.82%	21
No	68.18%	45
TOTAL		66

Q13 Are you providing advice in a sales capacity?

Answered: 67

Skipped: 7

ANSWER CHOICES	RESPONSES	
Yes	19.40%	13
No	80.60%	54
TOTAL		67

Q14 Are you working with producers in another capacity (e.g. agent, broker, banking)

Answered: 66

Skipped: 8

ANSWER CHOICES	RESPONSES	
Yes	19.70%	13
No	80.30%	53
TOTAL		66

Q15 If yes please describe

Answered: 13

Skipped: 61

#	RESPONSES	DATE
1	Sustainable agriculture and environmental service provider	5/12/2025 4:11 PM
2	General livestock and rangeland management advice, workshops, resources	5/10/2025 7:14 PM
3	My role is Animal Production Advisory Supporting producers with Animal Health, feed requirements, Nutrition and diagnosis on farm	5/6/2025 1:54 PM
4	Technical extension role	5/6/2025 10:03 AM
5	CEO farming systems group	5/1/2025 5:43 PM
6	Emissions accounting	4/30/2025 5:24 PM
7	Operating on a sales role, but respected for experience and integrity with producers	4/29/2025 8:15 PM
8	training	4/29/2025 3:56 PM
9	Our business also provides veterinary services	4/29/2025 3:43 PM
10	Management Consultancy	4/29/2025 12:33 PM
11	Career livestock agency including advice for breeding , management , marketing and all associated activities	4/27/2025 2:51 AM
12	Elders livestock	4/22/2025 8:42 AM
13	Stock & Station services are offered	4/17/2025 4:11 PM

Q16 Which of the following best describes your business stage

Answered: 61

Skipped: 13

ANSWER CHOICES	RESPONSES	
Start up phase	4.92%	3
Part time building client and income base	18.03%	11
Sustainable client base/income streams	37.70%	23
Looking to expand	29.51%	18
Slowing down operations/ retiring	9.84%	6
Building to sell	0.00%	0
TOTAL		61

Q17 What percentage of income to the business comes from

Answered: 67

Skipped: 7

ANSWER CHOICES	RESPONSES	
Red meat producers	79.10%	53
Other producers/growers	31.34%	21
Industry projects	61.19%	41
Government projects	49.25%	33
Other (please specify)	23.88%	16

#	RED MEAT PRODUCERS	DATE
1	10	5/17/2025 2:08 PM
2	100	5/14/2025 11:11 AM
3	75	5/8/2025 3:49 PM
4	95	5/6/2025 7:57 PM
5	50	5/6/2025 5:28 PM
6	10 (fee paying clients)	5/6/2025 2:02 PM
7	40%	5/6/2025 1:56 PM
8	.	5/5/2025 5:10 PM
9	90	5/5/2025 2:38 PM
10	50	5/5/2025 10:18 AM
11	100	5/2/2025 2:23 PM
12	20	5/2/2025 9:33 AM
13	50	5/2/2025 6:32 AM
14	10	5/1/2025 8:29 PM
15	10%	5/1/2025 5:44 PM
16	20	5/1/2025 10:13 AM
17	25%	5/1/2025 8:02 AM
18	50	5/1/2025 5:43 AM
19	30%	4/30/2025 7:48 PM
20	20	4/30/2025 5:25 PM
21	100%	4/30/2025 12:21 PM
22	80	4/30/2025 11:44 AM
23	75	4/30/2025 10:57 AM
24	70	4/30/2025 10:29 AM
25	99.9	4/30/2025 8:31 AM
26	100	4/30/2025 6:07 AM

27	70	4/30/2025 12:21 AM
28	100	4/29/2025 8:16 PM
29	50	4/29/2025 7:58 PM
30	60%	4/29/2025 5:39 PM
31	60	4/29/2025 5:19 PM
32	50	4/29/2025 5:18 PM
33	60	4/29/2025 5:07 PM
34	15	4/29/2025 4:28 PM
35	60	4/29/2025 4:09 PM
36	25	4/29/2025 4:02 PM
37	95%	4/29/2025 3:55 PM
38	80	4/29/2025 3:44 PM
39	100	4/29/2025 12:34 PM
40	100	4/29/2025 12:22 PM
41	100%	4/27/2025 2:52 AM
42	50%	4/24/2025 8:50 AM
43	40	4/22/2025 11:59 AM
44	100	4/22/2025 8:42 AM
45	97	4/20/2025 3:38 PM
46	15	4/18/2025 2:35 PM
47	50	4/18/2025 6:46 AM
48	45%	4/18/2025 12:06 AM
49	70	4/17/2025 9:31 PM
50	60	4/17/2025 7:57 PM
51	15	4/17/2025 4:12 PM
52	70	4/17/2025 2:56 PM
53	40	4/17/2025 2:54 PM
#	OTHER PRODUCERS/GROWERS	DATE
1	33	5/17/2025 2:08 PM
2	10	5/8/2025 3:49 PM
3	.	5/5/2025 5:10 PM
4	10	5/5/2025 2:38 PM
5	30	5/5/2025 10:18 AM
6	20	5/2/2025 9:33 AM
7	90	5/1/2025 8:29 PM
8	10%	5/1/2025 5:44 PM
9	30%	4/30/2025 7:48 PM
10	20	4/30/2025 5:25 PM

11	10	4/30/2025 11:44 AM
12	30	4/30/2025 10:29 AM
13	10	4/29/2025 5:18 PM
14	25 (dairy)	4/29/2025 4:02 PM
15	5%	4/29/2025 3:55 PM
16	0	4/29/2025 12:22 PM
17	40	4/18/2025 2:35 PM
18	50%	4/18/2025 12:06 AM
19	10	4/17/2025 9:31 PM
20	10	4/17/2025 7:57 PM
21	2	4/17/2025 4:12 PM
#	INDUSTRY PROJECTS	DATE
1	24	5/17/2025 2:08 PM
2	50	5/13/2025 9:58 AM
3	5	5/12/2025 4:12 PM
4	10	5/8/2025 3:49 PM
5	40	5/7/2025 11:32 AM
6	5	5/6/2025 7:57 PM
7	60	5/6/2025 10:04 AM
8	.	5/5/2025 5:10 PM
9	10	5/5/2025 10:18 AM
10	10	5/2/2025 9:33 AM
11	30	5/2/2025 6:32 AM
12	70	5/1/2025 12:00 PM
13	30	5/1/2025 10:13 AM
14	10	5/1/2025 10:10 AM
15	30%	5/1/2025 8:02 AM
16	50	5/1/2025 5:43 AM
17	30%	4/30/2025 7:48 PM
18	50	4/30/2025 5:25 PM
19	10	4/30/2025 11:44 AM
20	30	4/30/2025 12:21 AM
21	25	4/29/2025 7:58 PM
22	20	4/29/2025 5:19 PM
23	40	4/29/2025 5:18 PM
24	35	4/29/2025 5:07 PM
25	85	4/29/2025 4:28 PM
26	20	4/29/2025 4:09 PM

27	20	4/29/2025 4:02 PM
28	20	4/29/2025 3:44 PM
29	0	4/29/2025 12:22 PM
30	50%	4/24/2025 8:50 AM
31	30	4/22/2025 11:59 AM
32	2	4/20/2025 3:38 PM
33	30	4/18/2025 2:35 PM
34	10	4/18/2025 6:46 AM
35	5%	4/18/2025 12:06 AM
36	15	4/17/2025 9:31 PM
37	30	4/17/2025 7:57 PM
38	100	4/17/2025 4:21 PM
39	75	4/17/2025 4:12 PM
40	30	4/17/2025 2:56 PM
41	30	4/17/2025 2:54 PM
#	GOVERNMENT PROJECTS	DATE
1	33	5/17/2025 2:08 PM
2	100	5/14/2025 11:06 AM
3	100	5/14/2025 10:03 AM
4	50	5/13/2025 9:58 AM
5	90	5/12/2025 4:12 PM
6	5	5/8/2025 3:49 PM
7	60	5/7/2025 11:32 AM
8	40	5/6/2025 10:04 AM
9	.	5/5/2025 5:10 PM
10	10	5/5/2025 10:18 AM
11	50	5/2/2025 9:33 AM
12	10	5/2/2025 6:32 AM
13	80%	5/1/2025 5:44 PM
14	30	5/1/2025 12:00 PM
15	50	5/1/2025 10:13 AM
16	90	5/1/2025 10:10 AM
17	20%	5/1/2025 8:02 AM
18	10%	4/30/2025 7:48 PM
19	10	4/30/2025 5:25 PM
20	25	4/30/2025 10:57 AM
21	25	4/29/2025 7:58 PM
22	20	4/29/2025 5:19 PM

23	20	4/29/2025 4:09 PM
24	30	4/29/2025 4:02 PM
25	0	4/29/2025 12:22 PM
26	100	4/29/2025 10:07 AM
27	20	4/22/2025 11:59 AM
28	1	4/20/2025 3:38 PM
29	25	4/18/2025 2:35 PM
30	20	4/18/2025 6:46 AM
31	5	4/17/2025 9:31 PM
32	6	4/17/2025 4:12 PM
33	30	4/17/2025 2:54 PM
#	OTHER (PLEASE SPECIFY)	DATE
1	5	5/12/2025 4:12 PM
2	N/A (public sector)	5/10/2025 7:15 PM
3	50	5/6/2025 5:28 PM
4	90 (buy the drum)	5/6/2025 2:02 PM
5	.	5/5/2025 5:10 PM
6	Individual trial work 10%	5/2/2025 6:32 AM
7	viticulture / hort	5/1/2025 8:29 PM
8	25% sales	5/1/2025 8:02 AM
9	40% NRM groups	4/29/2025 5:39 PM
10	5 academic lecturing	4/29/2025 5:07 PM
11	Not sure	4/29/2025 4:03 PM
12	Start up phase = unsure.	4/29/2025 9:11 AM
13	10 - University, NRM projects	4/22/2025 11:59 AM
14	Sales 20	4/18/2025 6:46 AM
15	2	4/17/2025 4:12 PM
16	Govt organisation	4/17/2025 2:56 PM

Q18 Which of the following statements best describe your business situation with the range of services offered

Answered: 63

Skipped: 11

ANSWER CHOICES	RESPONSES	
Happy with the range of services offered	39.68%	25
Aiming to reduce range of services to specialise in a refined service offering	4.76%	3
Would like to expand range of services offered to clients	55.56%	35
TOTAL		63

Q19 If looking to expand the business, what do you see are the challenges faced in order to successfully achieve this? (tick all that apply)

Answered: 55

Skipped: 19

ANSWER CHOICES	RESPONSES	
Time	47.27%	26
Qualifications	7.27%	4
Knowledge base	21.82%	12
Viable income streams	47.27%	26
Availability of additional staff	29.09%	16
Capability to manage staff	14.55%	8
Lack of knowledge on how to grow business	16.36%	9
Other (please specify)	27.27%	15
Total Respondents: 55		

#	OTHER (PLEASE SPECIFY)	DATE
1	Getting producers to pay for the service	5/6/2025 5:28 PM
2	vision of business to see it as valuable and farmers willing to pay	5/6/2025 2:02 PM
3	lack of quality staff available	5/2/2025 6:32 AM
4	Limited work for entry level consultants	5/1/2025 10:13 AM
5	many roles to fill from website management, marketing, sales, advisory services, accounts and book keeping.	5/1/2025 8:02 AM
6	I would suggest all of the above	4/30/2025 10:57 AM
7	Ability to market myself as qualified to offer the service	4/30/2025 12:21 AM
8	Similar free services provided by government and NRM group	4/29/2025 7:58 PM
9	lack of staff with the required ability to employ	4/29/2025 5:18 PM
10	Marketing	4/29/2025 3:55 PM
11	N/A	4/29/2025 12:22 PM
12	Capital expenditure into tech for clients. Building the trust with clients.	4/29/2025 9:11 AM
13	Dread of managing young people's expectations. They want the world and need long term support and mentoring, lack of Resilience. Also, costs of employing staff - car, subscriptions, work cover, insurances, gear, continuing education vs ability to generate income	4/18/2025 6:46 AM
14	Low staffing numbers, young staff wanting a sound job.	4/18/2025 12:06 AM
15	Lack of advisors and lack of producer awareness	4/17/2025 7:57 PM

ANSWER CHOICES	RESPONSES	
Yes	50.79%	32
No	49.21%	31
TOTAL		63

Q21 If yes how many people are employed in these roles?

Answered: 27

Skipped: 47

ANSWER CHOICES	RESPONSES	
Number of employees advisory role	92.59%	25
Number of employees in administration	81.48%	22
Number of employees in reception	18.52%	5
Number of employees in book keeping	44.44%	12
Number of employees data entry	33.33%	9
Number of employees in labour	25.93%	7

#	NUMBER OF EMPLOYEES ADVISORY ROLE	DATE
1	10+	5/13/2025 9:59 AM
2	12	5/12/2025 4:12 PM
3	4	5/6/2025 2:02 PM
4	4	5/6/2025 1:57 PM
5	4	5/5/2025 10:19 AM
6	20	5/2/2025 9:34 AM
7	7	5/2/2025 6:33 AM
8	4	5/1/2025 5:45 PM
9	2	5/1/2025 12:01 PM
10	20	5/1/2025 10:13 AM
11	3	4/30/2025 7:49 PM
12	4	4/30/2025 12:22 PM
13	Up to 9	4/29/2025 8:17 PM
14	2	4/29/2025 5:20 PM
15	2	4/29/2025 4:02 PM
16	.5	4/29/2025 3:56 PM
17	2	4/29/2025 12:22 PM
18	2	4/27/2025 2:53 AM
19	18	4/22/2025 8:44 AM
20	2	4/20/2025 3:38 PM
21	70	4/18/2025 2:36 PM
22	260	4/18/2025 12:07 AM
23	3	4/17/2025 7:57 PM
24	6 in the SE NSW, more across the state	4/17/2025 2:57 PM
25	3	4/17/2025 2:56 PM

#	NUMBER OF EMPLOYEES IN ADMINISTRATION	DATE
1	3	5/12/2025 4:12 PM
2	?	5/6/2025 2:02 PM
3	1	5/5/2025 10:19 AM
4	10	5/2/2025 9:34 AM
5	4	5/2/2025 6:33 AM
6	3	5/1/2025 5:45 PM
7	1	5/1/2025 12:01 PM
8	10	5/1/2025 10:13 AM
9	1	4/30/2025 7:49 PM
10	.5	4/29/2025 5:20 PM
11	2	4/29/2025 4:02 PM
12	.05	4/29/2025 3:56 PM
13	1	4/29/2025 3:44 PM
14	3	4/29/2025 12:22 PM
15	1	4/27/2025 2:53 AM
16	More than 100	4/22/2025 8:44 AM
17	1	4/20/2025 3:38 PM
18	20	4/18/2025 2:36 PM
19	2	4/18/2025 6:46 AM
20	15	4/18/2025 12:07 AM
21	Multiple	4/17/2025 2:57 PM
22	1	4/17/2025 2:56 PM
#	NUMBER OF EMPLOYEES IN RECEPTION	DATE
1	4	5/2/2025 9:34 AM
2	0	5/2/2025 6:33 AM
3	1	5/1/2025 10:13 AM
4	1	4/27/2025 2:53 AM
5	More than 100	4/22/2025 8:44 AM
#	NUMBER OF EMPLOYEES IN BOOK KEEPING	DATE
1	1	5/5/2025 10:19 AM
2	2	5/2/2025 9:34 AM
3	0	5/2/2025 6:33 AM
4	1	5/1/2025 5:45 PM
5	3	5/1/2025 10:13 AM
6	.5	4/29/2025 5:20 PM
7	1	4/29/2025 4:02 PM
8	1	4/27/2025 2:53 AM

9	More than 100	4/22/2025 8:44 AM
10	1	4/20/2025 3:38 PM
11	10	4/18/2025 2:36 PM
12	1	4/17/2025 2:56 PM
#	NUMBER OF EMPLOYEES DATA ENTRY	DATE
1	3	5/12/2025 4:12 PM
2	3	5/5/2025 10:19 AM
3	2	5/2/2025 9:34 AM
4	0	5/2/2025 6:33 AM
5	20	5/1/2025 10:13 AM
6	.5	4/29/2025 5:20 PM
7	1	4/27/2025 2:53 AM
8	Several	4/22/2025 8:44 AM
9	5	4/18/2025 12:07 AM
#	NUMBER OF EMPLOYEES IN LABOUR	DATE
1	6	5/5/2025 10:19 AM
2	1.5	5/2/2025 6:33 AM
3	5	5/1/2025 10:13 AM
4	1	4/29/2025 4:02 PM
5	More than 100	4/22/2025 8:44 AM
6	1	4/20/2025 3:38 PM
7	12	4/17/2025 7:57 PM

Q22 What is the average years' experience of these employees

Answered: 23

Skipped: 51

ANSWER CHOICES	RESPONSES	
client facing	86.96%	20
administration	69.57%	16
reception	13.04%	3
book keeping	43.48%	10
data entry	30.43%	7
labour	21.74%	5
advisory role	65.22%	15

#	CLIENT FACING	DATE
1	8	5/13/2025 9:59 AM
2	5	5/12/2025 4:13 PM
3	50	5/6/2025 2:01 PM
4	3	5/5/2025 10:19 AM
5	20	5/2/2025 6:33 AM
6	30	5/1/2025 5:46 PM
7	10	5/1/2025 12:01 PM
8	15	5/1/2025 10:15 AM
9	35	4/30/2025 7:50 PM
10	15	4/30/2025 12:24 PM
11	15	4/29/2025 8:18 PM
12	15	4/29/2025 5:21 PM
13	20	4/27/2025 2:53 AM
14	15	4/22/2025 8:45 AM
15	17	4/20/2025 3:38 PM
16	4	4/18/2025 6:46 AM
17	4-12 years	4/18/2025 12:09 AM
18	20	4/17/2025 7:59 PM
19	20	4/17/2025 2:57 PM
20	10+	4/17/2025 2:57 PM

#	ADMINISTRATION	DATE
1	10	5/12/2025 4:13 PM
2	25	5/5/2025 10:19 AM
3		
4		
5		
6	25	5/1/2025 10:15 AM
7	15	4/30/2025 7:50 PM
8	25 and 3	4/29/2025 5:21 PM
9	5	4/29/2025 3:44 PM
10	5	4/29/2025 12:22 PM
11	20	4/27/2025 2:53 AM
12	10	4/22/2025 8:45 AM
13	1	4/20/2025 3:38 PM
14	15	4/18/2025 2:37 PM
15	4	4/18/2025 6:46 AM
16	15	4/17/2025 2:57 PM

#	RECEPTION	DATE
1	15	5/1/2025 10:15 AM
2	10	4/27/2025 2:53 AM
3	10	4/22/2025 8:45 AM
#	BOOK KEEPING	DATE
1	5	5/6/2025 2:01 PM
2	25	5/5/2025 10:19 AM
3	15	5/1/2025 10:15 AM
4	15	4/30/2025 7:50 PM
5	?	4/29/2025 5:21 PM
6	15	4/27/2025 2:53 AM
7	10	4/22/2025 8:45 AM
8	20	4/20/2025 3:38 PM
9	20	4/18/2025 2:37 PM
10	15	4/17/2025 2:57 PM
#	DATA ENTRY	DATE
1	15	5/12/2025 4:13 PM
2	5	5/6/2025 2:01 PM
3	3	5/5/2025 10:19 AM
4	15	5/1/2025 10:15 AM
5	10	4/27/2025 2:53 AM
6	10	4/22/2025 8:45 AM
7	15	4/17/2025 7:59 PM
#	LABOUR	DATE
1	10	5/6/2025 2:01 PM

Q23 Do you have a desire to start your own livestock advisory business?

Answered: 65

Skipped: 9

ANSWER CHOICES	RESPONSES	
Yes	4.62%	3
No	18.46%	12
Maybe	16.92%	11
Already operating my own business	60.00%	39
TOTAL		65

2	15	5/2/2025 6:33 AM
3	10	5/1/2025 10:15 AM
4	10	4/22/2025 8:45 AM
5	1	4/20/2025 3:38 PM
#	ADVISORY ROLE	DATE
1	8	5/13/2025 9:59 AM

Answered: 10

Skipped: 64

#	RESPONSES	DATE
1	I think with this situation it is better to work with agronomists to achieve the absolute best outcome for farmers we work with	5/17/2025 2:11 PM
2	Developing a viable client base Professional liability costs	5/14/2025 10:05 AM
3	Unsure of demand for service	5/13/2025 10:00 AM
4	Right portfolio of services	5/12/2025 4:14 PM
5	Experience	5/10/2025 7:16 PM
6	Start up costs	5/6/2025 2:01 PM
7	\$\$\$\$\$	5/5/2025 2:39 PM
8	Starting a client base, to cover essential costs. High cost of start up, insurance, tools of the trade.	4/18/2025 12:11 AM
9	Confidence and knowledge to run own business	4/17/2025 9:32 PM
10	Knowledge and confidence of being self employed	4/17/2025 2:58 PM

Q25 If Yes, what help do you see you'd need in order to get established?(tick all that apply)

Answered: 13

Skipped: 61

ANSWER CHOICES	RESPONSES	
Finding new clients	53.85%	7
Managing finances and cash flow	53.85%	7
Marketing and branding	69.23%	9
Administrative tasks (invoicing, contracts, etc.)	53.85%	7
Professional development and training	53.85%	7
Collaborating with other consultants	46.15%	6
Grant/tender writing	38.46%	5
Other (please specify)	7.69%	1
Total Respondents: 13		

#	OTHER (PLEASE SPECIFY)	DATE
1	Professional liability	5/14/2025 10:05 AM

Q26 If no, what would hold you back from doing so?

Answered: 8

Skipped: 66

#	RESPONSES	DATE
1	I like working 8-5, turning my phone off and going to the gym and enjoying my family. I also like not having to chase money. I have previously worked in a role where i got very burnt out and had to take 5months off, so now i highly value my personal time. In my role now i still have to do long days of travel and farmers still call after hours and on weekends, but I choose not to answer, I don't feel like this would be an option if i had my own business	5/6/2025 2:05 PM
2	I am currently employed	5/6/2025 10:04 AM
3	Already part of a business	5/2/2025 6:33 AM
4	Not qualified	5/1/2025 12:01 PM
5	Current successful model has potential to be greater.	4/30/2025 12:25 PM
6	Enjoy working for the current business and the access & support I can get from nation-wide team	4/30/2025 11:45 AM
7	Not interested. Content working where I am	4/29/2025 12:23 PM
8	Too old	4/18/2025 2:38 PM

Q27 Are you scaling back your advisory business or intending to exit in the next five years?

Answered: 61

Skipped: 13

ANSWER CHOICES	RESPONSES	
Yes	13.11%	8
No	86.89%	53
TOTAL		61

Q28 Do you have a succession plan or options for your clients to maintain continuity of service as you scale back or exit?

Answered: 55

Skipped: 19

ANSWER CHOICES	RESPONSES	
Yes	23.64%	13
No	76.36%	42
TOTAL		55

Q29 If yes, what is your planned strategy?

Answered: 12

Skipped: 62

#	RESPONSES	DATE
1	I am currently taking a 'gap year' and plan to return to my business in 2026, in the meantime I have passed on my clients to a new consultant with the understanding we will discuss who takes them on in the future (I may leave them with her). I see her and some others as the people I will mentor over the next 5 years as I wind back my work to build their capacity to service my clients.	5/7/2025 11:34 AM
2	Associate vets - avoid corporate structures	5/6/2025 5:29 PM
3	Marketing, customer service support	5/6/2025 2:03 PM
4	Identifying skilled people and bring them into the business,	5/2/2025 6:34 AM
5	Younger personnel takeover	4/30/2025 7:52 PM
6	Capable existing team	4/30/2025 12:26 PM
7	Hand over clients to other advisors in the business	4/29/2025 4:07 PM

Q30 Given your situation, would you see any value in joining a cooperative to

Answered: 58

Skipped: 16

ANSWER CHOICES	RESPONSES	
None of the above - I do not consider that joining a cooperative offers any advantages to me given my current business stage and situation	13.79%	8
Provide mentoring services to younger advisors	36.21%	21
Recruit advisors to your business	12.07%	7
Identify a successor or alternative provider	0.00%	0
Share workloads	6.90%	4
Other (please specify)	31.03%	18
TOTAL		58

#	OTHER (PLEASE SPECIFY)	DATE
1	Mentor younger advisors and still do some advisory work	5/14/2025 10:07 AM
2	Build my knowledge and network	5/10/2025 7:17 PM
3	Collaboration and PD	5/6/2025 7:59 PM
4	All of the above	5/6/2025 2:04 PM
5	Networking	5/6/2025 10:05 AM
6	Refer business	5/2/2025 2:24 PM

7	All of the above	5/2/2025 6:35 AM
8	To raise industry awareness of the benefits and potential applications of consultants to farm businesses, which will increase the amount of business available for consultants to tap into.	5/1/2025 10:16 AM
9	all of the above have merit but unsure how it would work	4/30/2025 7:53 PM
10	All of abovebut can only tick 1 box	4/29/2025 5:24 PM
11	Collaboration	4/29/2025 4:29 PM
12	Yes, would be an interesting exercise.	4/29/2025 4:11 PM
13	Working collaboratively on research, development and extension projects.	4/29/2025 12:35 PM
14	This should have been a multi-choice question. I would say 1, 2, 4 and 5. For 5 - administration support, insurance premium savings, networking	4/22/2025 12:02 PM
15	Joint learning on new tech / products to service producers	4/20/2025 3:39 PM
16	Benchmark business, get funding to employ new staff	4/18/2025 6:48 AM
17	Part of a network that may provide business income opportunities	4/17/2025 4:13 PM
18	To better understand the advisory business	4/17/2025 3:00 PM

Q31 What are the biggest challenges you face as a livestock advisor? (tick all that apply)

Answered: 58

Skipped: 16

ANSWER CHOICES	RESPONSES	
Finding new clients	50.00%	29
Managing finances and cash flow	32.76%	19
Marketing, branding, and promotion	31.03%	18
Administrative tasks (invoicing, contracts, etc.)	27.59%	16
Professional development and training	37.93%	22
Collaborating with other consultants	34.48%	20
Grant/tender writing	29.31%	17
Geographic spread of clients	37.93%	22
Time management	36.21%	21
Other (please specify)	31.03%	18
Total Respondents: 58		

#	OTHER (PLEASE SPECIFY)	DATE
1	Not enough training in the role, not enough people or time to cover region	5/10/2025 7:18 PM
2	I don't have any problem getting funding for new work, its finding the new client base that takes time if my existing client base is not appropriate for the project.	5/7/2025 11:35 AM
3	Other more demanding daily veterinary jobs that are paid for appropriately. Harder to bill for time spent in the advisor capacity.	5/6/2025 5:31 PM
4	working with staff in branches to get out on farm	5/6/2025 2:07 PM
5	skilled staff	5/2/2025 6:36 AM
6	funding limitations	5/1/2025 10:24 AM
7	Feast and famine, older producers willingness to pay	4/30/2025 7:55 PM
8	Getting "enough" holistic practical experience to re-enforce knowledge	4/30/2025 11:03 AM
9	lack of r and d from mla and awl	4/30/2025 10:30 AM
10	Breaking old habits from producers	4/29/2025 8:20 PM
11	none of the above	4/29/2025 5:20 PM
12	Having enough time to work with late adopters to coach them along so they see value in practice changes	4/29/2025 4:10 PM
13	Availability of childcare	4/29/2025 3:46 PM
14	Farmers are tightly held and controlled by large, corporate type consultancies, to their disadvantage, yet they feel trapped and are unwilling to move, regardless of the benefits.	4/29/2025 12:36 PM
15	Cyber security management, "unwillingness to pay" by large segments of the target market	4/22/2025 12:04 PM
16	Boom and bust of work	4/18/2025 2:39 PM
17	Planning. Generating enough income to fund additional staff	4/18/2025 6:48 AM
18	Finding staff	4/17/2025 2:58 PM

Q32How often would you network with, or work alongside, or partner with other consultants?

Answered: 60

Skipped: 14

ANSWER CHOICES	RESPONSES	
Daily	10.00%	6
Once a week	30.00%	18
Once a month	41.67%	25
Once a year	15.00%	9
Once every few years	3.33%	2
Never	0.00%	0
TOTAL		60

Q33 What sort of activities? (tick all that apply)

Answered: 60

Skipped: 14

ANSWER CHOICES	RESPONSES	
Joint projects	70.00%	42
Offer complimentary advice/services to my clients	51.67%	31
Specialist advice or information sharing (presentations, etc)	68.33%	41
Client sharing	25.00%	15
Mentoring (mentee)	31.67%	19
Other (please specify)	6.67%	4
Total Respondents: 60		

#	OTHER (PLEASE SPECIFY)	DATE
1	Share knowledge & problem solve together	5/10/2025 7:20 PM
2	phone calls, discuss cases, catch up at field days, occasionally use for presentations (usually supplier)	5/6/2025 2:10 PM
3	Industry updates	4/29/2025 12:38 PM
4	Cooperative industry training delivery	4/22/2025 12:05 PM

Q34 What do you find are the benefits of working alongside other advisors?

Answered: 53

Skipped: 21

#	RESPONSES	DATE
1	The deliverables are always better & providing more info & benefits to the clients to get the best outcomes & want to keep you coming back for ongoing pasture maintenance	5/17/2025 2:21 PM
2	Peer support Exposure to new ideas Different approaches and idea	5/14/2025 10:09 AM
3	Better outcome for clients, builds capacity and helps ensure the right services/advice is available	5/13/2025 10:03 AM
4	Offer a complete service for the clients needs	5/12/2025 4:16 PM
5	Provide support where there is none within our own businesses/teams	5/10/2025 7:20 PM
6	Diverse skill sets and different perspectives	5/8/2025 3:51 PM
7	as I am a sole operator so there is a social as well as collegiate benefits from having advisor partners for projects. I can work with my 'mates' which is fun and allows us to do bigger projects/work with more clients without the hassle of having employees. We partner for a project then move on to other things afterwards - all care and no responsibility for finding more work for them, just me!	5/7/2025 11:37 AM
8	Idea and knowledge sharing. Deep but broad information and strategies for clients	5/6/2025 8:03 PM
9	Knowledge sharing, support, unloading emotional baggage, collaborative fun	5/6/2025 5:32 PM
10	Sounding board for cases/thought processes and experience Support about the frustrating parts of being an advisor (i.e. clients not being accountable) learning new info at industry days	5/6/2025 2:10 PM
11	Collaboration, delivery of correct advice	5/6/2025 2:05 PM
12	Great sharing of information/advice, but only a small pool	5/6/2025 10:06 AM
13	Share Knowledge	5/5/2025 2:43 PM
14	Knowledge sharing and learning Networking	5/5/2025 10:22 AM
15	Sharing of information, referral of clients	5/2/2025 2:25 PM
16	learning from each other	5/2/2025 6:36 AM
17	professional support	5/1/2025 8:30 PM
18	Sharing information and experiences	5/1/2025 12:03 PM
19	knowledge sharing, increased benefit to landholder, reduction in duplication	5/1/2025 10:27 AM
20	New knowledge and skills New perspectives collegiality	5/1/2025 10:18 AM
21	Complimentary to the client offer and from another area typically therefore not competitive.	5/1/2025 8:07 AM
22	Varied perspectives, each can work in areas of speciality; shared workload	4/30/2025 7:56 PM
23	Share workload	4/30/2025 5:27 PM
24	Giving and receiving a diversity of experience and knowledge Stimulation Support Companionship	4/30/2025 11:08 AM
25	expand knowledge and skills	4/30/2025 10:31 AM
26	Knowledge sharing, always someone there to help the client	4/30/2025 6:09 AM
27	As long as there isn't competition to take over the other consultant's role - gaining new skills in	4/30/2025 12:25 AM

	adjacent fields etc	
28	Sharing of ideas and suggestions	4/29/2025 8:21 PM
29	Sharing of ideas and concepts	4/29/2025 5:41 PM
30	Collaborative sustained advice to clients	4/29/2025 5:25 PM
31	Want to pass on information to develop younger staff	4/29/2025 5:21 PM
32	knowledge sharing	4/29/2025 5:11 PM
33	Expanding skills to offer clients and grow businesses	4/29/2025 4:30 PM
34	Always learning how other advisors operate.	4/29/2025 4:12 PM
35	Everyone has a different skillset and different ideas. There's no 'right way' to achieve something so it's great to have different options to offer land managers and broaden my mind to different possibilities.	4/29/2025 4:12 PM
36	Broadening my own knowledge, but also the ability to ensure that our clients are receiving advice from specialists. This expands and strengthens the services I can offer and gets better outcomes for industry funding.	4/29/2025 3:47 PM
37	I honestly wish I could. I think there's a lot of benefit to working collaboratively, especially on government/MLA type projects. They're all too tightly held though, to the detriment of the industry.	4/29/2025 12:38 PM
38	Experience	4/29/2025 12:23 PM
39	Betterservice	4/27/2025 2:56 AM
40	Provision of technical expertise to clients for the best advice, problem solving/sharing, networking and social, professional development, access to greater range of projects and ability to work in a team environment despite being a sole operator. Industry knowledge of projects Nationally and connection.	4/24/2025 9:07 AM
41	New ideas and discovering better approaches to doing things. Motivation to keep going. Enjoyment of their company	4/22/2025 12:05 PM
42	Knowledge and time sharing	4/22/2025 8:53 AM
43	Learning whats happening in field , better knowledge from others	4/20/2025 3:40 PM
44	Learn new things, get jobs because the team is more attractive	4/18/2025 2:40 PM
45	More knowledge of industry	4/18/2025 6:49 AM
46	Information sharing, insights to their challenges and networking to build knowledge.	4/18/2025 12:20 AM
47	Exposure to new clients. Alignment of advice to reduce confusion for clients	4/17/2025 9:35 PM
48	Sharing skills	4/17/2025 8:01 PM
49	Always being able to grow and keep each other on track. Share stories and advice	4/17/2025 4:24 PM
50	Man are former colleagues and it is good to support and share skills	4/17/2025 4:14 PM
51	Sharing ideas,	4/17/2025 3:02 PM
52	New ideas, personal enjoyment working with others and higher quality service to clients.	4/17/2025 2:59 PM
53	Broader range of experience	4/17/2025 2:56 PM

Q35 Would you be interested in joining a cooperative of advisors that provides shared business support and/or networking opportunities?

Answered: 58

Skipped: 16

ANSWER CHOICES	RESPONSES	
Yes	48.28%	28
No	3.45%	2
Maybe, I need more information	48.28%	28
TOTAL		58

Q36 What aspects of a cooperative would be most valuable to you? (tick all that apply)

Answered: 57

Skipped: 17

ANSWER CHOICES	RESPONSES	
Centralised marketing, branding, and promotion	29.82%	17
Shared lead generation/client referrals	49.12%	28
Group purchasing for business tools (e.g., accounting software, insurance)	42.11%	24
Administrative support (e.g., invoicing, contract templates)	28.07%	16
Professional development and training	56.14%	32
Access to a network of experts for collaboration	78.95%	45
Grant/tender writing	29.82%	17
Mentoring and coaching support	45.61%	26
Bookkeeping and financial management	15.79%	9
Other (please specify)	14.04%	8
Total Respondents: 57		

#	OTHER (PLEASE SPECIFY)	DATE
1	providing mentoring/coaching to others younger/less experienced than me	5/7/2025 11:39 AM
2	Finding peopel with similar expertise to share workload	4/30/2025 5:30 PM
3	I could provide mentoring and coaching support	4/30/2025 11:17 AM
4	none of the above	4/29/2025 5:22 PM
5	None of the above jump out at me.	4/29/2025 4:14 PM
6	Sharing in project work and income.	4/29/2025 12:40 PM
7	Cloud based file management, cybersecurity management, travel arranger	4/22/2025 12:08 PM
8	Merchandise group buying to compete with major rural resellers	4/18/2025 6:50 AM

Q37 Would you prefer a cooperative model that focuses more on:

Answered: 55

Skipped: 19

ANSWER CHOICES	RESPONSES	
Business support services	14.55%	8
Client acquisition and shared projects	32.73%	18
Both equally	52.73%	29
TOTAL		55

Q38 Are there concerns you have that might prevent you from joining a cooperative?

Answered: 57

Skipped: 17

ANSWER CHOICES	RESPONSES	
Yes	42.11%	24
No	43.86%	25
If yes, please outline any concerns you may have	56.14%	32
Total Respondents: 57		

#	IF YES, PLEASE OUTLINE ANY CONCERNS YOU MAY HAVE	DATE
1	Client contacts, confidentiality, IP,	5/12/2025 4:20 PM
2	To southern-system focussed, not inclusive of northern Australia	5/10/2025 7:21 PM
3	would need to be shared values around cooperation not competition and sharing resources openly.	5/7/2025 11:39 AM
4	conflict of interests, differences of opinion/knowledge from vet background vs other background ie evidence based	5/6/2025 5:34 PM
5	not looking to own buisness so would like to be able to not participate in that.	5/6/2025 2:13 PM
6	Liability, group coordination, time required to invest in coop with little return to me and my business	5/6/2025 10:07 AM
7	I would need to understand this concept in more detail. Competitive industry.	5/5/2025 10:24 AM
8	hwo it would function and peoples ability to be colaborative that said we should try	5/2/2025 6:38 AM
9	spreading the inquiry evenly	5/1/2025 8:31 PM
10	over service of clients causing too many field days	5/1/2025 8:09 AM
11	Aligned approach to client management if shared clients, I've had several experiences of poor client service and compromising my client relationships, other advisor integrity is a big issue; admin issues are relatively simple, its client relationships that are key	4/30/2025 8:00 PM

12	Might be associated with people that have different approaches and quality of service to me - reputational damages	4/30/2025 5:30 PM
13	Intellectual property?	4/30/2025 3:08 PM
14	Would need to allow for a diversity of qualifications, opinions, knowledge and experience	4/30/2025 11:17 AM
15	Other consultants offering identical services to me - how would producers choose one over the other (eg remote services)	4/30/2025 12:27 AM
16	Activity with current employer	4/29/2025 8:22 PM
17	Retention of I.P.	4/29/2025 8:02 PM
18	Potential cost and larger businesses determine weaker areas of individual businesses	4/29/2025 5:35 PM
19	at my age no benefit to me.	4/29/2025 5:22 PM
20	mutual benefit without significant cost	4/29/2025 5:14 PM
21	Would need to clearly identify the benefits.	4/29/2025 4:14 PM
22	Loss of personalised service provision to clients	4/29/2025 4:05 PM
23	Competition from others rather than collaboration, and no choice of who to work with	4/29/2025 3:50 PM
24	Poaching of clients, although I'd really only engage in shared research and extension that doesn't involve any clients.	4/29/2025 12:40 PM
25	It may lead clients to look outside the cooperative for advice if it's perceived negatively.	4/29/2025 9:14 AM
26	Decreased personal contact with clients (personal touch)	4/24/2025 9:09 AM
27	Not enough participants to achieve the services/products cost-effectively.	4/22/2025 12:08 PM
28	Loss of business	4/22/2025 8:55 AM
29	In experience client sharing can be tricky if both parties don't consider value of each other and focus on win win	4/20/2025 3:42 PM
30	Won't fit with the current business structure	4/18/2025 2:41 PM
31	Ability to share information and trust	4/17/2025 9:37 PM
32	Need likeminded people.	4/17/2025 3:00 PM

Q39 What characteristics of a cooperative would be important to you? (tick all that apply)

Answered: 55

Skipped: 19

ANSWER CHOICES	RESPONSES	
Is regionally specific	34.55%	19
Provides services to similar/same clients as mine	36.36%	20
Includes advisors that I respect	81.82%	45
Includes advisors who could mentor me	34.55%	19
Includes advisors who provide different services than me	70.91%	39
Access to professional development	61.82%	34
Total Respondents: 55		

Q40 Would you be willing to pay a membership fee for access to cooperative benefits?

Answered: 56

Skipped: 18

ANSWER CHOICES	RESPONSES
Yes	21.43% 12
No	8.93% 5
Maybe, depending on the cost and benefits	69.64% 39
TOTAL	56

Q41 If yes or maybe, what monthly fee would you consider reasonable?

Answered: 43

Skipped: 31

#	RESPONSES	DATE
1	Depends on the benifits	5/17/2025 2:24 PM
2	Would depend on income I was generating.	5/14/2025 10:11 AM
3	100	5/12/2025 4:21 PM
4	Annual fee of \$80 only if there is real value in being a part of it	5/10/2025 7:22 PM
5	\$400	5/8/2025 3:52 PM
6	Would depend on the services gained ie if we were sharing a CRM or something similar. \$500 per month to start with if we were getting a good level of professional development and client referrals.	5/7/2025 11:40 AM
7	50	5/6/2025 5:34 PM
8	\$60-\$100 per month	5/6/2025 2:43 PM
9	\$20/m	5/6/2025 2:13 PM
10	I think fee would be dependent on what benefits I would get for time and fee investment	5/6/2025 10:08 AM
11	Depends on value for money	5/2/2025 2:26 PM
12	really depends on what is offered	5/2/2025 6:39 AM
13	\$100	5/1/2025 8:32 PM
14	50	5/1/2025 10:21 AM
15	Would depend on the income generated for my business by it.	5/1/2025 8:11 AM
16	Have to see the deal	4/30/2025 8:01 PM
17	Depends what you get out of it. I can generally find people I respect and make contacts directly, so probably only a small fee.	4/30/2025 5:31 PM
18	Dependant on the service	4/30/2025 3:08 PM
19	Maybe, depending on the cost and benefits	4/30/2025 11:18 AM
20	\$50	4/30/2025 8:52 AM
21	\$30	4/30/2025 6:11 AM
22	Completely depends	4/30/2025 12:28 AM
23	Totally unsure	4/29/2025 8:22 PM
24	Depends on potential income generation or cost savings. \$2 -4K/ month	4/29/2025 5:43 PM
25	50	4/29/2025 5:35 PM

26	\$50/month	4/29/2025 5:15 PM
27	I would be happy to pay \$150/month	4/29/2025 4:15 PM
28	\$100-\$500	4/29/2025 3:50 PM
29	Honestly, have no idea	4/29/2025 12:25 PM
30	Unsure at this point.	4/29/2025 9:14 AM
31	Highly relative to value generated. 5%	4/27/2025 2:58 AM
32	We already pay membership to be par of the SA livestock consultants group - \$230 per year (ex GST)	4/24/2025 9:11 AM
33	\$200 per month base fee for administrative support/product discounts. Wouls also consider paying additional "fee for service" options if more services were used	4/22/2025 12:10 PM
34	\$100	4/22/2025 8:55 AM
35	Depends on benefits - Aust vet association 1k PA	4/20/2025 3:42 PM
36	50	4/18/2025 2:41 PM
37	Unsure	4/18/2025 6:51 AM
38	Unsure and varies from client to client.	4/18/2025 12:24 AM
39	I really couldn't say	4/17/2025 9:38 PM
40	\$1000	4/17/2025 8:03 PM
41	Not sure at this stage but have been having these discussions	4/17/2025 4:26 PM
42	A percentage of earnings	4/17/2025 3:15 PM
43	Depends on the value proposition	4/17/2025 3:00 PM

Q42 Which of the following options do you see could be feasible in a cooperative model (Tick all elements that you believe could be applicable considering a cooperative may be a hybrid of elements)

Answered: 51

Skipped: 23

ANSWER CHOICES	RESPONSES	
A flat monthly/annual membership fee	45.10%	23
A commission-based model (e.g., cooperative takes a small percentage of client fees)	31.37%	16
A fee for service basis based on options that are utilised (e.g. fee for invoicing services, HR/marketing support)	52.94%	27
Other (please specify)	5.88%	3
Total Respondents: 51		

#	OTHER (PLEASE SPECIFY)	DATE
1	i think mentoring and Professional development need to be separate from invoicing and HR stuff otherwise will only get buisness owners and not young just entering the industry advisors	5/6/2025 2:26 PM
2	Could be a combination of all; depends on WFM	4/30/2025 8:04 PM
3	none...this really is a shit survey	4/30/2025 10:34 AM

Q43 What services (available to you or clients) or particular outcomes would make a cooperative membership of value to you?

Answered: 42

Skipped: 32

#	RESPONSES	DATE
1	Accessing affordable professional liability insurance Marketing	5/14/2025 10:12 AM
2	Linkages to trustworthy suppliers who provide complementary services	5/12/2025 4:22 PM
3	Training opportunities, support, networking, regular tips/tricks/resources	5/10/2025 7:23 PM
4	Joint collaboration for grant or funding projects, client share etc	5/8/2025 3:53 PM
5	CRM for communication with clients if working on shared projects. Comms support/visual comms development ie flyers, social media posts etc. Help with event organisation ie registration service, database recording of Evaluation and monitoring that can generate reports for funders etc.	5/7/2025 11:43 AM
6	Client leads to enable depth and breadth of information and strategies to more clients	5/6/2025 8:09 PM
7	Developing a network of support	5/6/2025 2:45 PM
8	professional development - update for advisors on latest research outcomes Journal club email group for tricky cases update from other advisors on what PDS have done, what worked what didn't	5/6/2025 2:26 PM
9	Sharing systems. Needs to be somewhat flexible.	5/5/2025 2:48 PM
10	Referral and joint projects	5/2/2025 2:26 PM
11	Info sharing, options for sharing work load	5/2/2025 6:40 AM
12	Networking activities, sharing ideas to create efficiencies.	5/1/2025 12:05 PM
13	Marketing of events Growing industry awareness and need for consultancy services	5/1/2025 10:24 AM
14	Promotion and sales of my business and what it offers without competition.	5/1/2025 8:15 AM
15	Complementary trusted advisors	4/30/2025 8:04 PM
16	Finding like skilled and like minded people	4/30/2025 5:31 PM
17	Promotion of services	4/30/2025 3:18 PM
18	An opportunity to share knowledge, experience and hopefully some wisdom before I kick the bucket!	4/30/2025 11:29 AM
19	none	4/30/2025 10:34 AM
20	Billable work	4/30/2025 8:53 AM
21	All stated before	4/30/2025 6:11 AM
22	I like the idea of a regionally specific cooperative which collects a handful of advisors offering services unique from but complimentary to one another to share clients and knowledge without competing	4/30/2025 12:32 AM
23	Unsure	4/29/2025 8:24 PM
24	Ability to support each other to deliver the necessary outcomes for their clients. Every advice cannot be good at everything, stay in your lane and use the team around you to get the best result.	4/29/2025 5:46 PM
25	NA	4/29/2025 5:24 PM
26	Benchmarking / financial acumen training	4/29/2025 5:20 PM

27	I would like to work with someone with good writing skills and a good understanding of rangeland science.	4/29/2025 4:17 PM
28	Knowing all livestock advisors in the region and their services so I can recommend them to land managers	4/29/2025 4:15 PM
29	Combined agronomy and nutrition advice	4/29/2025 4:06 PM
30	Invoicing, book keeping, inbox management	4/29/2025 3:52 PM
31	Tendering for project work as a pool of talent, with work equally shared between the active applicants.	4/29/2025 12:41 PM
32	Industry events and training.	4/29/2025 12:25 PM
33	Easy access to other tech devices from other advisors. Easy access to other areas of expertise when I'm outside my area of knowledge.	4/29/2025 9:17 AM
34	Within SALC professional development and networking has been the most valuable. Administrative services or automation of certain tasks may be of benefit.	4/24/2025 9:21 AM
35	Business support - book keeping, travel bookings. Insurance brokerage service. Also cloud-based server provision, cybersecurity services and IT services. Perhaps discounts on computer hardware.	4/22/2025 12:13 PM
36	Producer demonstration sites	4/22/2025 8:57 AM
37	tech training - bulk discounts at labs	4/20/2025 3:43 PM
38	Group buying power Access to insurance at a cheap rate	4/18/2025 6:52 AM
39	Openness of members, Structure of advisory services.	4/18/2025 12:27 AM
40	Expanded client network. Diversity of knowledge to lean into for own client value.	4/17/2025 9:42 PM
41	Integrated services	4/17/2025 8:04 PM
42	Supplying the whole supply chain in each sector - region specific	4/17/2025 4:28 PM

Q44 Is there anything else you'd like to add about the challenges of, opportunity to join, or considerations in design of a livestock advisor cooperative

Answered: 26

Skipped: 48

#	RESPONSES	DATE
1	Just want to help clients get the best outcomes, & I we have a calibration with each other	5/17/2025 2:26 PM
2	Finding other suppliers who have a value creation mindset and understand the customer's needs – not just trying to sell outdated services.	5/12/2025 4:22 PM
3	A need for early career advisors paired with mentors who don't see them as competition in a negative sense	5/8/2025 3:53 PM
4	There would need to be clear guidelines and 'rules' with consequences if broken. People need to be confident there is 'trust' and 'respect' between members and a way of resolving this if broken.	5/7/2025 11:43 AM
5	NO	5/6/2025 2:26 PM
6	Look towards analogous industries - law, accounting, engineering etc	5/1/2025 10:24 AM
7	A cooperative could work, however I have my own brand that I want to work. Many others would feel the same way and that's why most service providers are independent and haven't formed partnerships already.	5/1/2025 8:15 AM
8	Coops at large have had a chequered past; it would have to be managed well and client based and focussed; unsure how you deal with client poaching, etc	4/30/2025 8:04 PM
9	No	4/30/2025 5:31 PM
10	Setting up a structured program for harvesting the experience, knowledge and wisdom of the oldest generation of producers (& consultants) who are looking for a change in their careers.	4/30/2025 11:29 AM
11	no	4/30/2025 10:34 AM
12	I see a lot of competition already between advisors who can offer remote services, eg data management and Sheep Genetics services. Would need a way to differentiate advisors from each other who are offering the same service.	4/30/2025 12:32 AM
13	No	4/29/2025 8:24 PM
14	Actually have a business model idea for this which has some merit, just needing similar like minded individuals to come on board to make it work.	4/29/2025 5:46 PM
15	I think the chance of this working for more than 8 years is very low.	4/29/2025 5:24 PM
16	Needs to be well managed, as a consultant cooperative could be like "herding cats" ie similar to farmers which tend to be individuals rather than having a cooperative mentality	4/29/2025 5:20 PM
17	No	4/29/2025 4:17 PM
18	-	4/29/2025 12:25 PM
19	A commission based cooperative feels completely wrong from a body like MLA.	4/29/2025 9:17 AM
20	Different consultants have different needs and business models. One of the success factors of SALC has been that we are independent of product sales, but this does exclude some advisers (ie those who work with selling products to producers-supplements etc). Mostly they tend to already be in bigger businesses with access to networks, professional development and administrative support though.	4/24/2025 9:21 AM
21	No	4/22/2025 8:57 AM
22	Tech training	4/20/2025 3:43 PM
23	Standardising output and quality control	4/18/2025 2:42 PM
24	No	4/18/2025 6:52 AM
25	No	4/18/2025 12:27 AM
26	Challenge to share clients. Competition between advisors. Misalignment/disagreement of advice within same cooperative.	4/17/2025 9:42 PM

Q45 Would you be interested in participating in an online focus group to discuss potential cooperative models? (A time and date has not been set to date)

Answered: 55

Skipped: 19

ANSWER CHOICES	RESPONSES	
Yes	61.82%	34
No	38.18%	21
TOTAL		55

Q46 If yes, please let us know your name and email address below and an invite will be sent once details are confirmed.

Answered: 35

Skipped: 39

#	RESPONSES	DATE
1	Kyle Hester Kyle@cirta.com.au	5/17/2025 2:27 PM
2	Mick Sullivan mick.sullivan@dpi.qld.gov.au	5/14/2025 10:13 AM
3	Andrew McCartney andrewmccartney@sqjlandscapes.org.au	5/12/2025 4:22 PM
4	Stacey Holzapfel, stacey.holzapfel@nt.gov.au	5/10/2025 7:24 PM
5	Monica Ley leyagservices@gmail.com	5/8/2025 3:54 PM
6	Kristy Howard, email: kristy@inspiringexcellence.com.au Note I will be overseas from 16 july to 15 Dec 2025	5/7/2025 11:44 AM
7	Laura Cunningham lauracunningham@agnvet.com.au	5/6/2025 2:46 PM
8	Sarah Maher sarahmaher@agnvet.com.au	5/6/2025 2:26 PM
9	Jenny Simmonds Jasimmond007@gmail.com	5/5/2025 2:49 PM
10	Sam Krieg samk@pastoraledge.com.au	5/2/2025 2:27 PM
11	Andrew Speirs aspeirs@meridian-ag.com.au	5/2/2025 6:40 AM
12	donna.turner@nqdrytropics.com.au	5/1/2025 10:32 AM
13	matt.agridome@gmail.com	5/1/2025 8:15 AM
14	Gordon Stone, gordon.stone@abdi.com.au	4/30/2025 8:04 PM
15	Luke Harrison Lukeharrison@agnvet.com.au	4/30/2025 3:18 PM
16	Malcolm Cock farmdynamics@dcsi.net.au	4/30/2025 11:29 AM
17	Matt Brown matt@browncattlecountryconsultants.com.au	4/30/2025 8:53 AM
18	Zac Geldof zac@zacag.com.au	4/30/2025 6:12 AM
19	David Squibb David.Squibb@alfagenseeds.com.au	4/29/2025 8:24 PM
20	Ross Newman ross@pasturestoprosperity.com	4/29/2025 5:47 PM
21	Colin Trengove. colin@proagvet.com	4/29/2025 5:21 PM
22	chelsea chelsea.hair@herdsolutions.com.au	4/29/2025 4:06 PM
23	Tammy@tammykruckow.com Tammy Kruckow	4/29/2025 4:02 PM
24	James Macfarlane James@agricultra.com.au	4/29/2025 12:42 PM
25	emilystretch@hotmail.com Emily Stretch	4/29/2025 9:17 AM
26	Andrew Hosken ahosken@bigpond.net.au	4/27/2025 2:59 AM
27	As per letter to MLA, SALC would be willing to participate (in a paid capacity) as we have years of experience and a case study for a model already in existence. As consultants we already give enormous amount of time to 'industry good' on committees, advisory groups and the like, so feel that our expertise in this area should be valued financially (as many of us are sole operators trying to balance paid work with increasing large amounts of unpaid work). elkehocking@gmail.com	4/24/2025 9:26 AM
28	Rob Inglis: rob.inglis@elders.com.au	4/22/2025 8:57 AM

29	Adam Little Adam.little@elders.com.au and also Thomas Elder Consulting.	4/18/2025 12:29 AM
30	Olivia Woodiwiss olivwoodiwiss@gmail.com I am overseas at the moment so may not be able to join due to time difference - but happy and interested to be a part of the idea.	4/17/2025 9:43 PM
31	Phil Tickle ptickle@cibolabs.com.au	4/17/2025 8:05 PM
32	Amanda Burchmann Amanda@jabagrisolutions.com.au	4/17/2025 4:29 PM
33	Alastair Rayner alastair@raynerag.com.au	4/17/2025 4:16 PM
34	Mark Gardner Mark.gardner@vbs.net.au	4/17/2025 3:01 PM
35	Hannah Griffiths hglivestock@outlook.com	4/17/2025 2:58 PM

8.3 Appendix C – Advisor Focus Group Agenda

Section	Who	Question	Tool
Intro	BR/SL	Project Background – SL Focus Group Agenda – BR (polls and discussion and chat)	
	BR	Where are you?	Chat
	BR	What role do you play? Owner, Employee, Sole Trader, or Partner	Poll
Survey results	BR	Survey Summary – Motivations, Barriers, Needs	Slide
Motivations: Access		Which of the following skills or expertise would be vital to access in a cooperative?	Poll
Motivations: Access		Are there other skills or expertise that would be important for you?	Discussion
Motivations: Development		Being involved in an advisory co-op, how important would each of the following three motivations be to you? (PD, mentoring, networking)	Discussion
		We had some comments from the survey that being part of a cooperative may increase the likelihood of a successful transition of a business. This may occur through mentoring another advisor. Does this ring true for anyone here? or would a cooperative provide a means for succession of client work?	Discussion
Motivations: Development /Barrier: Time		If you were part of a coop, what sort of time commitment would you see as reasonable to give towards giving or receiving PD, mentoring and intentional networking? (per month)	Poll
Barriers: Time		If you were part of a coop, what sort of time commitment would you see as reasonable to give towards the management or day to day operations of the cooperative on a volunteer basis? (per month)	Poll and discussion
Model intro	BF	Present overview of suggested model	Slide
	BR	Initial clarification questions	Discussion
Tier model and cost		What tier would you consider signing up for?	Poll
		What is the highest tier level you would consider signing up for?	Poll
		Is anything missing from the tier system that would encourage you to consider a higher level?	Discussion
		How much would you pay to be a member at tier one? (annually)	Poll
		How much would you pay to be a member at tier two? (annually)	Poll

		How much would you pay to be a member at tier three? (annually)	Poll
		Would you prefer to pay one higher once off annual fee, or smaller fee with added on costs per service, event, etc	Poll
		EXPLAIN AIRTASKER: Would you engage in an airtasker/AirBNB type model?	Poll and discussion
Barrier: Cost		Are there any other questions or comments regarding cost?	Discussion
	BR	Do you see any benefit in any umbrella marketing, or stay in charge of your own marketing? If its somewhere in the middle, to what level or detail would the cooperative focus?	Discussion
Needs: Cultural Fit		Networking/Collaboration: What number of advisors should be the minimum participating in the coop in order for the collaboration and co-working to function well?	Discussion
Needs: Cultural Fit		How do you feel about commercial/corporate members joining the cooperative? (resellers, larger firms, sales and advise driven staff in feed or fert companies, other sorts of advisors not directly ag related)	Poll and discussion
Needs: Cultural Fit		Should the cooperative be regionally or nationally focused?	Poll
MLA		Where do you see the benefit of MLA involvement? What could that involvement look like?	Discussion
		Any additional questions or considerations?	

8.4 Appendix D - Producer Focus Group Agenda

Section	Who	Question	Tool
Intro	BR/SL	Project Background – SL Focus Group Agenda – BR (polls and discussion and chat) What is an advisor? Livestock advisors can be defined as people who provide regular advice and guidance to red meat producers and can be public or private sector advisors e.g. extension officers, consultants, veterinarians, livestock agents, agronomists or Natural Resource Management (NRM) officers.	
	BR	Where are you?	Chat
	BR	What role do you play in your business? Owner, Owner/Manager, Employed Manager, Other Employee, Contractor, Other	Poll 1
		Do you use a consultant or advisor? - Yes, private fee for service - Yes, state gov expert or extension staff (free) - Yes, resellers or sales from company - Yes, other - No	Poll 2 – multiple options
		What types of services do you use them for?	Discussion
	BF	In your region, do you think producers have adequate access to advisors or not? Do you believe this just in your region or further beyond?	Poll: - There are not enough advisors - There is adequate amount of advisors - There are too many advisors Discussion
	BF	Are there services you cannot access that you want or need?	Discussion?

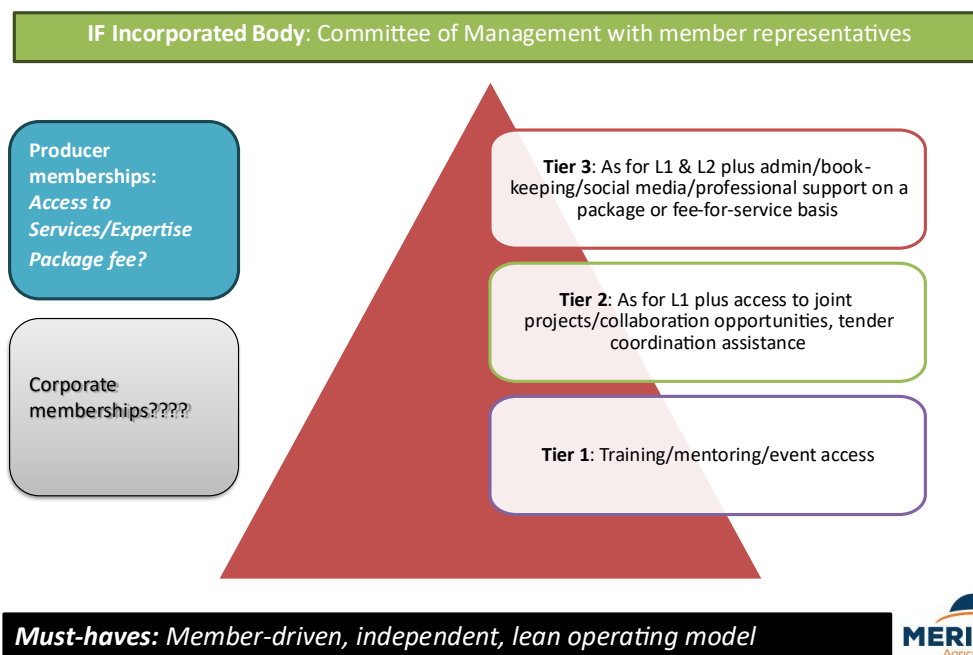
		<p>How important are each of the following elements when deciding to use a consultant</p> <ul style="list-style-type: none"> - Independence - Service quality - Value for money - Relevant experience for their region - Ability to form a long term relationship - Is well connected with other experts or colleagues 	<p>Poll 3</p> <p>Very important</p> <p>Somewhat important</p> <p>Not important at all</p>
		Of those mentioned, which is the most important element for you?	Chat
		How do you judge an advisor's expertise and ability to assist you?	Discussion
		In order to remain relevant and competitive, how many days per year do you believe an advisor should be spending undertaking intentional training, personal and professional development, and getting personal support and mentoring?	<p>Poll 4</p> <p>1-5, 5-10, 20-20, 20+days</p>
		How much more likely to use an advisor if you knew they had an established network of other experts and mentors behind them?	<p>Poll 5</p> <p>Not more likely, somewhat more likely, much more likely</p>
		<p>We are looking at developing a model where individual advisors can join together in a cooperative organisation: to work together, undertake training, provide each other mentoring and support, as well as potentially assisting in tasks such as marketing, bookkeeping and other administrative roles.</p> <p>As a producer, we want to know what would be valuable to you in engaging with a coop.</p>	
		If you could also become members, what sort of services would you like to be able to access from the advisor members?	Chat
		<p>What sort of things would be useful for you as a producer if you had access to advisors in a cooperative?</p> <ul style="list-style-type: none"> - On call advice - Access to training - Accessing a variety of experts - Joint servicing (two or more advisors working together on your issue, plan, etc) 	<p>Poll 6</p> <ul style="list-style-type: none"> - On call advice - Access to training - Accessing a variety of expertise

		- What else?	
		Would you be more or less likely to engage with a consultant who is part of a cooperative?	Poll 7 Less likely, the same, more likely
	Bryony	DESCRIBE AIRTASKER MODEL: How attractive is this airtasker model? As a producer, put out a request via an online portal/post and be open for available consultants in the cooperative to reach out to you?	Discussion
		How much would you pay to be a member of a cooperative if it offered a package like this: <ul style="list-style-type: none"> - Three on call session with an advisor of your choice - Access to group training days - on an annual basis? 	Poll 8 Up to \$500 Up to \$1,000 Up to \$2,000 \$2,000+
		We are looking at various models that could operate on both regional and national levels. How important to you is it that a cooperative operates regionally vs nationally.	Poll 9 Within my region Nationally Both Doesn't matter as long it's the right advice
		Other thoughts?	

8.5 Appendix E – Proposed model shared during Focus Groups for discussion and consideration



Tiered Membership Approach?



8.6 Appendix F - Advisor Focus Group Polls and chat comments

Poll Question	Responses	Percentiles
Where are you located?	Barossa, South Australia Kojonup, Western Australia Rockhampton, QLD Dubbo, NSW Tamworth, NSW Casterton, Victoria Great Southern, Western Australia Rockhampton, QLD Toowoomba, Queensland Melbourne, Victoria Dubbo, NSW Pittsworth, QLD Yass, NSW Rockhampton, QLD	
What role do you play in your business?	Sole Trader x 7 Owner with employees x 4 Other x 3 Employee x 2	44% 25% 19% 12%
Which of the following skills or expertise would be vital to access in a cooperative?	Professional Development/ Training x 10 Mentoring and intentional networking x 10 Find new clients x 5 People Management x 4 Marketing x 3 Administrative tasks x 2 Grant/Tender Writing x 1	83% 83% 42% 33% 25% 17% 8%
Being involved in an advisory co-op, how important would each of the following three motivations be to you?	Professional Development Very Important x 12 Somewhat important x 2 Not at all Important x 2	75% 12.5% 12.5%
	Mentoring Very Important x 6 Somewhat important x 9 Not at all Important x 2	35% 53% 12%
	Networking Very Important x 13 Somewhat important x 3 Not at all Important x 1	76% 18% 6%
If you were part of a coop, what sort of time commitment would you see as reasonable to give towards giving or receiving training, mentoring and	1-2 hours x 2 2-4 hours x 3 4-8 hours x 9 8-20 hours x 1	13.5% 20% 60% 6.5%

intentional networking? (per month)		
Would you engage with an "Airtasker/AirBNB" model?	Yes x 11 No x 2	85% 15%
How do you feel about commercial/corporate members joining the cooperative? (resellers, larger firms, sales and advise driven staff in feed or fert companies, other sorts of advisors not directly ag related)	Stick to independent advisors or advisory firm members x 3 It depends x 5 Anyone could join x 2	30% 50% 20%
Should the cooperative be regionally or nationally focused?	Regionally focused with advisors working within the region x 2 Regionally focused with advisors potentially working across multiple regions x 1 National focused, no borders x 3	33% 17% 50%
What is the highest tier level you would consider signing up for and how much would you pay (annually)?	Tier 1 x 2 (Range \$200 to \$300) Tier 2 x 4 (Range \$500 to \$5,000) Tier 3 x 2 (Range \$3,000 to \$20,000)	25% 50% 25%

8.7 Appendix G - Producer Focus Group Polls

Poll Question	Responses	Percentiles
What role do you play in your business?	Owner x 1 Owner/Manager x 2 Other x 1	25% 50% 25%
Do you use a consultant or advisor?	Yes, private fee for service x 4 Yes, state gov expert or extension staff (free) x 4 Yes, advice from a resellers or sales representative from a company x 3	100% 100% 75%
How important are each of the following elements when deciding to use a consultant?	Independence Very Important x 4 Somewhat Important x 1 Not important	80% 20% 0%
	Service quality Very Important x 4 Somewhat Important x 1 Not important	80% 20% 0%
	Value for money Very Important x 5 Somewhat Important Not important	100% 0% 0%
	Relevant experience in the region Very Important x 4 Somewhat Important x1 Not important	80% 20% 0%
	Ability to form a long term relationship Very Important x 4 Somewhat Important x 1 Not important	80% 20% 0%
	Is well connected with other experts or colleagues Very Important x 3 Somewhat Important x 2 Not important	60% 40% 0%
In order to remain relevant and competitive, how many days per year to do believe an advisor should be spending undertaking intentional training, personal and professional development, and getting personal support and mentoring?	1-5 days x 0 5-10 days x 2 10-20 days x 3 20+ days x 0	0% 40% 60% 0%
How much more likely to use an advisor if you knew they had an	Much more likely x 3 Somewhat more likely x 1	60% 20%

established network of other experts and mentors behind them?	Not any more likely x 1	20%
What sort of things would be useful for you as a producer if you had access to advisors in a cooperative?	On call advice x 2 Access to training and events x 3 Access to a range of experts x 3 Joint servicing x 2 Other x 3	40% 60% 60% 40% 60%
Would you be more or less likely to engage with a new consultant who is part of a cooperative?	More likely x 1 What have no impact on decision x 3 Less likely x 0	25% 75% 0%
How much would you pay to be a member of a cooperative?	Up to \$500 x 0 Up to \$1,000 x 1 Up to \$2,000 x 3 \$2,000+ x 0	0% 25% 75% 0%
How important to you is it that a cooperative operates regionally vs nationally?	Doesn't matter as long it's the right advice x 1 A mix of both x 1 Prefer a nation wide group x 0 Prefer a regionally based group x 3	20% 20% 0% 60%

8.8 Appendix H – Tiered Membership model – Financials

LAC: MEMBER-DRIVEN	<i>Inflation Rate:</i>		2.5%	<i>Wage inflation</i>	2.5%		Comments/Assumptions
Assumptions/Forecast	Year 1: 26/27	Year 2: 27/28	Year 3: 28/29	Year 4: 29/30	Year 5: 30/31		
<u>Tier 1 Advisor Membership</u>							Enables access to training/development, online (free) and in person (small charge) events
<i>Advisor members - South</i>	25	45	70	85	100		
<i>Advisor members - North/Remote</i>	20	35	30	35	40		
<u>Tier 2 Associate Membership</u>							Enables access to all Tier 1 events plus shared marketing/promotion, access to co-working opportunities, referrals, producer enquiries, co-ordination & assistance with tender applications (charged per hour)
<i>Advisor members - South</i>	20	45	60	60	60		
<i>Advisor members - North/Remote</i>	15	25	35	35	35		
<i>Professional support - tenders - hours</i>		30	75	120	130		
<u>Mentor/Senior Associate Membership</u>							Available to Associate Members who provide mentoring services (fee rebate)
<i>Advisor members - South</i>		6	8	15	15		
<i>Advisor members - North/Remote</i>		4	6	10	10		
<u>Fee for Service Packages</u>							Business support services charged per service (10% markup on outsourced services)
<i>Social media packages</i>			15	35	40		
<i>Client admin and comms packages</i>			12	25	30		
<i>Book-keeping and basic finance packages</i>			6	25	30		
<i>Professional support hours - general</i>	20	50	75	100	120		
<u>Producer members</u>							Annual fee enables up to 5 requests to be circulated within advisor network
<i>Producer members - South</i>		25	50	60	60		
<i>Producer members - North/Remote</i>		35	80	95	95		

							additional services to be contracted privately. Access to conference sessions/open webinars.
	Events/Training/PD						
	Online/Webinars	6	8	10	10	10	
	Training Days	2	3	4	4	4	
	Training Day participants	15	50	60	100	120	
	Annual Conference		1	1	1	1	Annual conference charged separately
	Conference participants		40	60	80	80	
	Staffing						
	Membership/Event coordination: FTE	0.3	0.6	1.0	1.0	1.0	
	Project/co-working administration	0.2	0.4	0.8	1.0	1.2	
	Support services - FTE			0.8	1.3	1.3	
	Prices	Year 1: 26/27	Year 2: 27/28	Year 3: 28/29	Year 4: 29/30	Year 5: 30/31	
Mark-up on out-sourced services	Tier 1 Advisor Annual Fee	250	250	250	275	275	
10%	Tier 2 Associate Annual Fee	650	850	1,500	1,500	1,500	Reduced Yr 1 & 2- to encourage participation
Rebate on Mentor/Senior Associate Membership	Mentor/Senior Associate Annual Fee		595	1,050	1,050	1,050	
30%	Producer Annual Fee		750	1,000	1,025	1,050	Introductory Yr 2- to encourage participation
	Trainer/presenter fees/day	2,000	2,050	2,101	2,154	2,208	
	Training day fee/member participant	90	100	100	100	100	
	Conference fee/member participant	150	150	175	175	175	Day attendance only
	Social media package	1,200	1,230	1,261	1,292	1,325	Subject to fair use policy
	Client admin and comms package	1,200	1,230	1,261	1,292	1,325	Subject to fair use policy
	Book-keeping and basic finance package	1,800	1,845	1,891	1,938	1,987	Outsourced
	Other professional support services/hr	175	179	184	188	193	
	FTE salary: admin/coordination	79,000	80,975	82,999	85,074	87,201	Inclusive of superannuation
	FTE salary: project/tender management	95,000	97,375	99,809	102,305	104,862	Inclusive of superannuation
	Staff office expense contribution/FTE	1,200	1,230	1,261	1,292	1,325	

P&L	Operating Forecast	Year 1: 26/27	Year 2: 27/28	Year 3: 28/29	Year 4: 29/30	Year 5: 30/31	
	<u>INCOME</u>						
	Tier 1 Advisor Membership	\$11,250	\$20,000	\$25,000	\$33,000	\$38,500	
	Tier 2 Advisor Membership	\$22,750	\$59,500	\$142,500	\$142,500	\$142,500	
	Tier 2 - Professional Support	\$0	\$5,381	\$13,789	\$22,615	\$25,112	
	Mentor/Senior Associate Membership	\$0	\$5,950	\$14,700	\$26,250	\$26,250	
	<i>Social media packages</i>	\$0	\$0	\$18,911	\$45,229	\$52,983	
	<i>Client admin and comms packages</i>	\$0	\$0	\$15,129	\$32,307	\$39,737	
	<i>Book-keeping and basic finance packages</i>	\$0	\$0	\$11,347	\$48,460	\$59,606	
	<i>Professional support hours</i>	\$3,500	\$8,969	\$13,789	\$18,846	\$23,180	
	Package fees income/Professional support	\$3,500	\$8,969	\$59,176	\$144,842	\$175,506	
	Producer Membership	\$0	\$45,000	\$130,000	\$158,875	\$162,750	
	Training event fees (in-person)	\$1,350	\$5,000	\$6,000	\$10,000	\$12,000	
	Conference fees	\$0	\$6,000	\$10,500	\$14,000	\$14,000	
	Sponsorship/External (Training) Funding		\$10,000	\$15,000	\$20,000	\$20,000	
	TOTAL INCOME	\$38,850	\$165,800	\$416,666	\$572,081	\$616,618	
	<u>EXPENSES</u>	Year 1: 26/27	Year 2: 27/28	Year 3: 28/29	Year 4: 29/30	Year 5: 30/31	
	Events, training and development						
	Wages	\$23,700	\$48,585	\$82,999	\$85,074	\$87,201	
	Staff travel/subsistence reimbursement	\$5,000	\$6,000	\$8,000	\$10,000	\$10,000	
	Consumables/Printing/Postage	\$1,000	\$1,000	\$1,000	\$1,250	\$1,500	
	Speaker expenses	\$7,000	\$12,300	\$15,759	\$16,153	\$16,557	
	Conference Costs - venue/catering		\$12,000	\$15,000	\$18,000	\$18,000	
	Consumables						
	Total Expenses - Events & Training	\$36,700	\$79,885	\$122,759	\$130,478	\$133,258	
	Co-working and project management, Producer Services						
	Wages	\$19,000	\$38,950	\$79,848	\$102,305	\$125,835	
	Total Expenses - Co-working/Projects	\$19,000	\$38,950	\$79,848	\$102,305	\$125,835	
	Packages and Professional Services Support						
	Wages	\$0	\$0	\$66,400	\$110,597	\$113,362	
	Outsourced services - book-keeping/finance	\$0	\$0	\$10,212	\$43,614	\$53,645	

	Total Expenses - Professional Services	\$0	\$0	\$76,612	\$154,211	\$167,007	
	Gross Margin	-					
	T1: Events, training and development	\$24,100	-\$38,885	-\$66,259	-\$53,478	-\$48,758	
	T2: Co-working and project management, Producer Services	\$3,750	\$70,931	\$206,442	\$221,685	\$204,527	
	Packages and Professional Services Support	\$3,500	\$14,919	-\$2,735	\$16,881	\$34,749	
		-					
	Total Gross Margin	\$16,850	\$46,965	\$137,448	\$185,088	\$190,518	
	Cross-check	-\$16,850	\$46,965	\$137,448	\$185,088	\$190,518	
	Fixed Operating Expenses	Year 1: 24/25	Year 2: 25/26	Year 3: 26/27	Year 4: 27/28	Year 5: 28/29	
	Permanent/non-allocated wages	\$0	\$0	\$0	\$0	\$0	
	Staff office/admin expense contribution	\$600	\$1,230	\$3,278	\$4,264	\$4,636	
	Telephone and internet	\$2,400	\$2,460	\$2,522	\$2,585	\$2,649	
	Management Committee Expenses	\$3,000	\$3,075	\$3,152	\$3,231	\$3,311	
	Rent						
	IT Support and subscriptions	\$10,000	\$10,250	\$15,000	\$15,375	\$15,759	Website/platform development Yr 3
	Insurance and Workcover	\$6,500	\$8,000	\$13,000	\$15,000	\$15,000	
	Accounting and professional fees	\$10,000	\$11,500	\$12,500	\$15,000	\$15,000	
	Consumables, postage, sundries	\$2,000	\$2,050	\$2,101	\$2,154	\$2,208	
	OD interest	\$300	\$500	\$500	\$800	\$500	
	Depreciation- equipment						
	Total Fixed Operating Expenses	\$34,800	\$38,565	\$51,553	\$57,608	\$58,564	
	Total Operating Costs	\$90,500	\$157,400	\$330,770	\$444,602	\$484,664	
	EBIT	\$51,650	\$8,400	\$85,896	\$127,480	\$131,954	\$302,080

Cash Flows	Statement of Cash Flows	Year 1	Year 2	Year 3	Year 4	Year 5	
	<u>Operations</u>	-					
	Net Profit Before Tax	51,650	8,400	85,896	127,480	131,954	
	Add back: Investor Leases	-	-	-	-	-	
	Add back: depreciation	-	-	-	-	-	
	Add back: bank interest	300	500	500	800	500	
	Less: Non-Cash Inventory gain (Add back Loss)						
	Less increase (decrease) in working capital	2,583	3,003	3,875	2,079	224	
	Less taxation	-	-	-	-	-	
		-					
	Net Operating Cash Flows	48,768	5,898	82,521	126,201	132,231	
	<u>Investing</u>						
	Additions - Property, plant and equipment						
	Net Additions - Transferable Investments						
	Less: Sale of Capital items						
	Less: Start-up capex allowance						
	Net Investing Cash Flows	-	-	-	-	-	
	<u>Financing</u>						
	New Funding Invested	55,000					
	New Loan capital drawn down						
	Dividends received						
	Less: Investor Interest/Leases	-	-	-	-	-	
	Less: Bank Interest	-	-	-	-	-	
	Less: Repayment of Bank Financing	300	500	500	800	500	
	Less: Repayment of Investor Capital						
							Total
							55,000

	Less: Other Dividends Paid						
	Net Financing Cash Flows	54,700	- 500	- 500	- 800	- 500	
	Net Cash Movement	5,933	5,398	82,021	125,401	131,731	
	Opening cash	-	5,933	11,330	93,351	218,751	
	Closing cash	5,933	11,330	93,351	218,751	350,482	

Balance Sheet						
Year 0/ Opening	Balance Sheet (\$) (Closing)	Year 1	Year 2	Year 3	Year 4	Year 5
	Current Assets					
0	Cash	5,933	11,330	93,351	218,751	350,482
0	Receivables (5% of sales)	1,943	8,290	20,833	28,604	30,831
0	Inventories					
	Other	-	-	-	-	-
-	Total Current Assets	7,875	19,620	114,184	247,356	381,313
	Non-Current Assets					
	Investments					
	Property, Plant & Equipment					
-	Total Non-Current Assets	-	-	-	-	-
-	TOTAL ASSETS	7,875	19,620	114,184	247,356	381,313
	Current Liabilities					
-	Payables (assume 5% of Op Costs)	4,525	7,870	16,539	22,230	24,233
-	Interest Bearing Liabilities	-	-	-	-	-
0	Provisions					
-	Total Current Liabilities	4,525	7,870	16,539	22,230	24,233
	Non-Current Liabilities					
-	Interest Bearing LTL	-	-	-	-	-
0	Deferred Tax Liability					
0	Investor Loans					
-	Total Non-Current Liabilities	-	-	-	-	-

-	TOTAL LIABILITIES	4,525	7,870	16,539	22,230	24,233
	<i>TA - TL Cross-check</i>	<i>3,350</i>	<i>11,750</i>	<i>97,646</i>	<i>225,125</i>	<i>357,080</i>
	Equity					
-	Contributed Equity	55,000	55,000	55,000	55,000	55,000
0	Revaluation Reserves	0	0	0	0	0
0	Retained Profits (Losses)	-	-	-	-	-
		51,650	43,250	42,646	170,125	302,080
-	TOTAL EQUITY	3,350	11,750	97,646	225,125	357,080
		-	-	-	-	-