

National Landcare Program (NLP)

Property Management Planning Campaign in SA

1993 - 1996



PRIMARY INDUSTRIES
AND RESOURCES SA



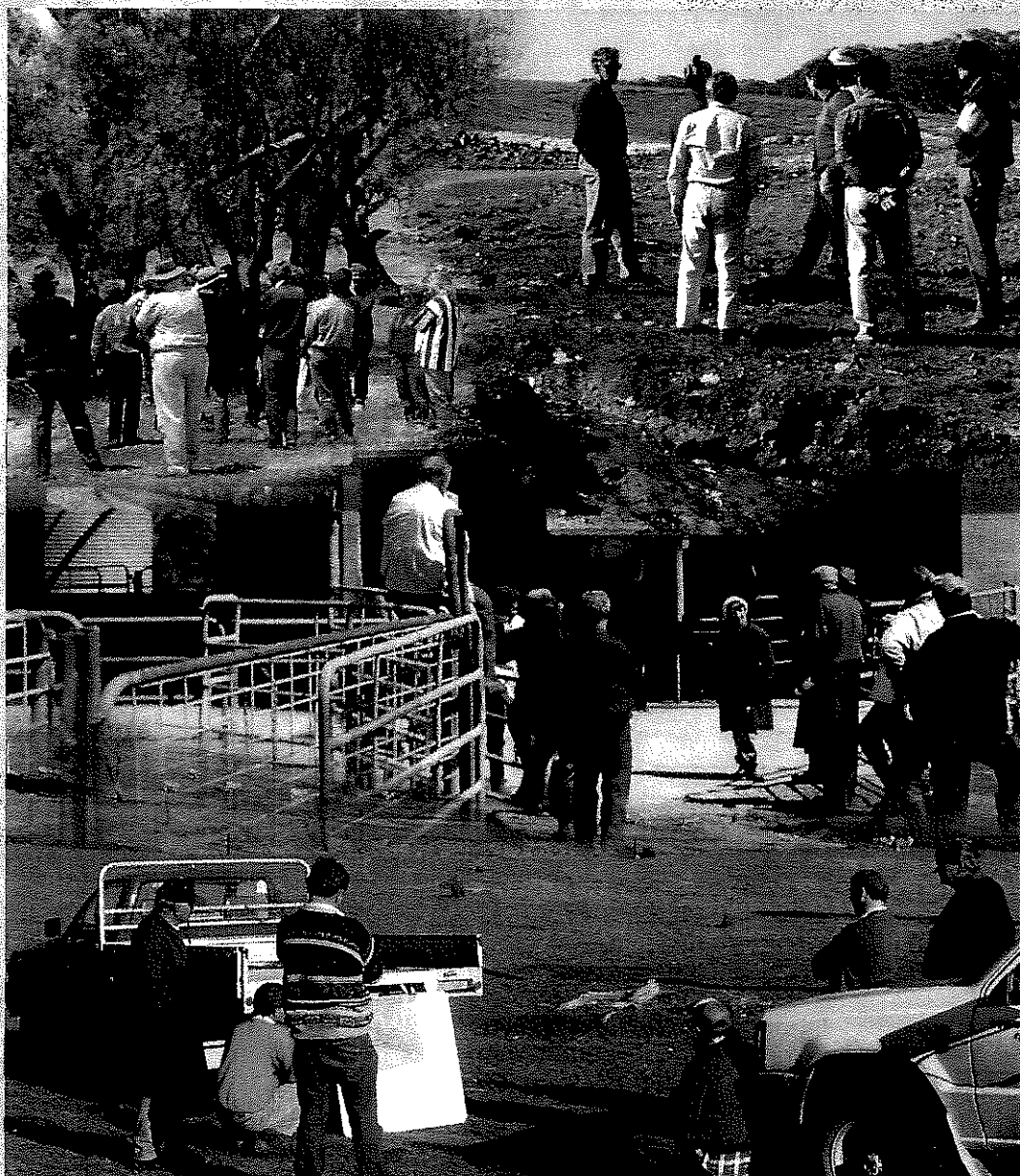
Front cover situations - clockwise from top left:

Dairy farmers from Mt. Compass inspecting 'curved electric fencing' around a revegetation site at 'Rangelea Park', Harragate. Special farm visit, revegetation/fencing.

The Harragate PMP group discuss a 'salinity control drainage scheme on 'Redaways'. Annual Review Workshop.

The Rockleigh PMP group assessing land classes. Natural Resource Stocktake.

The Harragate PMP group inspecting pasture improvement. Enterprise Planning Workshop.



Situations - clockwise from top left:

Spring Valley PMP group discuss water course protection at 'Burnbrae', Eden Valley.

Considering dam spillway design near Parndana, Kangaroo Island. Land Management & Layout Planning Workshop.

The Parawa PMP group considering whether to modernise a dairy. Business Planning Review Workshop.

Discussing saline area rehabilitation at Rockleigh. Land Management & Layout Planning Workshop.

Property Management Planning Campaign in South Australia

(incorporating drought preparedness and risk management)

PROJECT COMPLETION REPORT

(DRYLAND PROJECT)

National Landcare Program Partnership Agreement Project

Report of the South Australian component of the
National Property Management Planning Campaign
delivered by Primary Industries SA
and funded by the National Landcare Program

1993 – 1996

(Stage 2)

Compiled by RD Williams

**Primary Industries
South Australia**

Property Management Planning Campaign in South Australia
PROJECT COMPLETION REPORT
CONTENTS

	Page
1. PROJECT ADMINISTRATION DETAILS	5
2. SYNOPSIS	7
3. PROJECT OBJECTIVES, EFFECTIVENESS AND EFFICIENCY	
3.1 Original Objectives of the Project	8
Principal Objectives	
Specific Objectives	
Overall Objective	
3.2 Rationale and Background for the Project	9
3.3 Methodology	9
Staff	9
Core Workshop Program	10
Awareness Seminars	11
Special Events	12
Materials`	12
Publications	13
Interstate and National Initiatives	13
Promotion And Group Formation	14
Training	16
Linkages, Partnerships & Supplementary Training	16
Evaluation	17
3.4 Achievement Of The Objectives	
Principal Objective 1	20
Principal Objective 2	21
Principal Objective 3	21
Principal Objective 4	22
Specific Objective 1:	23
Decisions and Skills	23
Communication	24
Risk and Drought	24
Implementation	25
Specific Objective 2:	25
Specific Objective 3	26
4. KEY LEARNINGS AND FUTURE DIRECTION	
4.1 Marketing	27
4.2 Partnerships	28
Internal	
External	
4.3 Training	29

4.4 Links with Industries	29
4.5 Delivery Method	29
4.6 Follow-on Learning	30
4.7 Evaluation	30
5. ADMINISTRATION OF PMP STAGE 2	31
5.1 Personnel	
5.2 Financial	
6. ACKNOWLEDGMENTS	32
7. SUMMARY AND CONCLUSIONS	32

TABLES

Table 1. Contribution by PISA and the Community to the PMP campaign in SA	6
Table 2. Participation in the PMP Core Workshop Program to 31/12/96	11
Table 3. Selected features of farm plans in South Australia.	23

INDEX of APPENDICES	34
----------------------------	----

ATTACHMENTS

1. Extension Resource Manual
2. PMP Summary Document
3. PMP Facilitator's Guide – a resource for developing session plans
4. *Making Plans* - promotional booklet
5. *Property Management Planning Workshops* – promotional brochures
6. *Making Plans* - promotional video
7. *Big Wheels, Big Deals, Where to now?* – tax and financial planning seminar

Note: The attachments were submitted with this report to NLP, Canberra. Other readers can obtain copies from:

Mr John Squires
Program Manager
Property Management Planning
PIRSA
9 Old North Rd
CLARE SA 5453



**NATIONAL LANDCARE PROGRAM (NLP)
PARTNERSHIP AGREEMENT
PROJECT COMPLETION REPORT**

Office use only

State

S A

NLP

931 727

**Property Management Planning Campaign in South Australia
(incorporating drought preparedness and risk management)**

1. PROJECT ADMINISTRATION DETAILS

Project Title Property Management Planning Campaign

Name of community group/organisation Primary Industries, South Australia

Contact Name Mr Andrew Johnson **Phone** 08 83039532

Project Dates

	Month	Year		Month	Year
Actual starting date	April	1993	Finish date	December	1996

Funding Indicate the total grant received from NLP \$1,792,198

Grant Balance (how much was left over?) \$59,649

Has the remainder been refunded to the NLP via the State Agency for use in other NLP projects? Yes ☐ No ☒

If not, have you and the State NLP Coordinator agreed on an arrangement for the unspent funds? Yes ☒ No ☐

If not what arrangements do you intend to discuss with the State NLP Coordinator for the unspent funds?

The original NLP grant for this project was \$1,792,198 allocated over 5 financial years:

1992/93	\$ 164,710
1993/94	\$ 432,114
1994/95	\$ 433,652
1995/96	\$ 507,815
1996/97	\$ 253,907

Contribution by State Agency (Primary Industries SA)

Under the Partnership Agreement the submitting agency PISA was to contribute an approximately equal amount to the PMP Campaign as was allocated by the NLP. The contributions estimated in the original application and the amounts estimated to have been actually contributed over the 5 financial years (whole or part) of the project are shown below. Contributions made by third parties, primarily the groups of clients, is also shown.

Table 1. Contribution by PISA and the Community to the PMP Campaign in SA

Cost item	Original PISA estimate	Estimate of actual PISA funding	Estimate of client groups	Total cost
Salaries and wages workshop prep & deliver	1,437,500	6 regions x 5 officers x 5% FTE x \$45K p.a.		253,125
On Costs	102,811	24% of salary		86,430
Accommodation		\$18K x 30 x .05 pa ⁽¹⁾		101,250
Admin Off., Policy Group	44,387	0.22 FTEpa		45,000 62,000
Travel	57,500	30 officers x 5% x \$2K p.a.	10 business x 20k x (92x8+30x4) ⁽⁴⁾ x 50c	112,500 85,600
Other operating	46,000	30 x 5% x \$5K x 3.75yrs ⁽²⁾		28,125
Support for PMP Officers		\$18K x 9 x 3.75 ⁽³⁾		607,000
Establish / maintain Clare PMP Office		30,000 p.a.		112,500
Mapping services	51,750			50,000
Registration and kits			1347 x \$70	94,290
Time		Manual prep etc :0.5 FTE x \$80K Printing	10 x 7hr x (92x8+30x4) x \$15 ⁽⁶⁾	898,800 40,000 50,000
Aerial Photos			1300 x 150	195,000
Venue etc			(92x8+30x4)x \$20 ⁽⁷⁾	17,120
Total	1,739,948	Other agency : PISA x 0.25 = 159,793	1,290,810	3,048,533

1. 5% of \$18K for 30 officers for 3.75 years
2. 5% of \$5K for 30 officers for 3.75 years
3. \$18K for 9 PMP officers for 3.75 years

4. 92 businesses for 8 workshops + 30 businesses for 4 workshops
5. "
6. "

2. SYNOPSIS

Stage 2 of the Property Management Planning Campaign in South Australia, funded under the National Landcare Program from 1993 to 1996, improved the natural resource and economic sustainability of rural landholdings. The project developed the total business management skills of farmers by delivering a program of workshops to groups of farmers, in which they worked through a property management planning process and developed a basic plan that covered the main aspects of their business – land, people, enterprises, finances. The program was delivered by a team of 7 facilitators, a project leader and two administration officers.

During the term of the project, April 1993 to December 1996:

- PMP Awareness Seminars were presented to 53 groups of extension officers, Soils Boards, and agribusiness personnel.
- An Extension Resource Manual and a Facilitators Guide were produced as aids for delivering the workshops.
- The workshop program was delivered to 122 farmer/landholder groups, comprising 1347 businesses (including 30 and 351 respectively part-way through the program at 31/12/96).
- Several special events were held in collaboration with other agencies and individual service providers.
- Promotional material was produced including a video.
- Five interstate visits were made by team members to familiarise other PMP teams of progress of PMP in SA.
- Partnerships were developed with other providers of resource management and business training for farmers, especially government advisers, bankers, accountants, and rural counsellors by involving them in the delivery of core workshops and supplementary training.

The objectives of the project were achieved:

- The decision making capability and management skills of participants, including drought preparedness and risk management, were improved, utilised and incorporated into their plans.
- The role and value of property management planning for landholders was understood and appreciated by advisers from government departments, banks, agribusiness, consultants and education institutions.
- Many landholders have continued with further training and skill development opportunities.
- Landholders identified the cause of land and water management problems, and integrated control strategies into their overall business plans.
- Their plans took into account District Plans to the extent that they were available, and the program contributed to the development of district planning

The project has indicated some directions for the future of PMP:

- Marketing will need to be more effective.
- There should be greater collaboration with PISA internal and external partners.
- The program should be tailored to suit different industries.
- Training of facilitators to increase their facilitation abilities should continue.
- Innovative ways of delivering the PMP process should be explored.
- Review workshops need to be provided for past participants in PMP.
- More effort is required to guide participants into follow-on learning activities.
- The rigour of the evaluation of PMP should be increased

3. PROJECT OBJECTIVES, EFFECTIVENESS AND EFFICIENCY

3.1 *Original Objectives of the Project*

The **Principal Objectives** of the PMP Campaign as given in the original application for funding under the National Soil Conservation Program were:

1. Policy, research and development framework and planning data are adequate to support the development at regional and district level of coordinated land resource management plans and action programs, that incorporate community, landholder and industry ownership and commitment.
2. Landuse decisions by landholders are based on district standards outlined in appropriate District Plans that integrate action with respect to soil, water, vegetation and wildlife.
3. The causes of land and water management problems are identified correctly and effort concentrated on prevention and rehabilitation rather than the symptoms.
4. Problem control strategies are integrated into overall sustainable land resource management and protection programs, that include the physical management, land use and financial management of a property, taking into consideration climate variability and other management and market factors.

The Property Management Planning Campaign responded to the Government's new drought strategy of shifting funds away from direct drought subsidies into improving the management and planning skills of landholders.

Thus the **Specific Objectives** from encouraging landholders to participate in Property Management Planning workshops were:

1. To incorporate drought preparedness and risk management planning into property management planning training which improves the decision making capability and management skills of participant landholders.
2. To generate support and understanding of the role of property management planning, and of the need for improved decision making capability of landholders, in advisers from government departments, banks, agribusiness, consultants, education institutions etc.
3. To promote further training and skill development opportunities for landholders.

The overall objective: To develop the total business management skills of farmers in South Australia by encouraging their adoption of an effective property management planning process.

3.2 Rationale and Background for the Project

Stage 1 of Property Management Planning (PMP) in South Australia (1991-1992) contributed towards the improved production capacity of South Australian farming and grazing properties by developing and introducing an efficient property planning system to farm business managers.

A centre for property planning in South Australia was established at Clare, staffed by a Project Leader, a Property Planning Officer, and an Administration Officer, the only staff under the project. They developed a process of whole farm planning that considered, in addition to the physical resources, a broader approach that encompassed business planning and personal goals.

The Stage 1 project piloted a promotional extension program. A series of training workshops were organised and on-farm case studies were done. Participants developed a whole farm management process which considered the inter-relating aspects of climate, topography, soil, vegetation, property improvements, crops and livestock, labour, cash flow, economic inputs and returns, capital and personal goals.

During this successful establishment phase of the project, a Property Management Planning Policy Group (1st meeting 1/3/91) and a Property Management Planning Consultative Committee (1st meeting 30/3/93) were established to oversee its continuing development and expansion, which was to include the incorporation of drought and risk management training. Stage 2 of the project, the Property Management Planning Campaign in South Australia, aimed to promote the adoption of the property management planning process by land managers throughout the State. This would enhance natural resource sustainability, and risk management including drought management, resulting in more viable farm businesses and rural communities.

This report refers to the Dryland component of the Property Management Planning Campaign in South Australia. The Irrigation component was funded and reported separately.

3.3 Methodology

3.3.1 Staff

The Stage 1 project team of David Heinjus, Project Leader

Simon Read, Property Management Planning Officer

Aileen Shannon, Administration Officer

continued in their roles at the Clare centre for Property Management Planning. On 1/7/93 five Property Management Planning Officers commenced duty, bringing the total to six, located at Primary Industries SA offices to service regions as follows:

Officer	Location	Region
Tony Craddock	Naracoorte	South-East
Paul Erkelenz	Port Augusta	Northern Pastoral
Simon Guerin	Port Lincoln	Eyre Peninsula
Simon Read	Clare	Mid-North, Barossa, Yorke Peninsula
John Squires	Loxton	Mallee, Murraylands
Richard Williams	Mount Barker	Adelaide Hills, Fleurieu Peninsula, Kangaroo Island

In July 1994 they were joined by:

Peter Willmott (1/2 FTE) located at Kingscote servicing Kangaroo Island

In June 1995 Tony Craddock left his position at Naracoorte, and in July was replaced by Chris Scheid.

In July 1995 Kerry Geyer joined the team as the second Administration Officer at Clare.

These officers were all employed under the NLP funding. The major part of the State funding of the Program was contribution to development, promotion and workshop delivery by PISA* Industry Extension and Development Officers, and to a lesser extent by officers of the Department of Environment and Natural Resources. NLP-funded Landcare Officers also contributed significantly to the Program, especially in promotion to Landcare Groups.

From January 1996 Jean Turner was a member of the team as Revegetation Officer, with the special role of developing revegetation and vegetation management resources for the PMP program. She was separately funded by NLP and the Farm Forestry Program, and her contribution to the PMP program is reported in a separate Completion Report (*Planning Sustainable Land Management with Perennial Vegetation*).

3.3.2 Core Workshop Program

The principal method for achieving the Campaign's objectives was the delivery of the Core Workshop Program to groups of farmers, comprising 8 workshops totalling 45-50hrs:

Setting Direction	Natural Resource Stocktake	Human Resources
Business Position	Enterprise Evaluation	Enterprise Planning
Property Layout	Business Plan Review	

Attendance by farming families or teams was encouraged. The workshops guided the participants through the planning process, enhancing their overall business skills and enabling the development of a business plan to give them direction and strategies for future profit and sustainability. Participants were encouraged to continue the planning process at home, including the preparation that was required for some workshops.

The program varied according to group needs, mainly with respect to length of workshops, time span of the whole program, and number of supplementary workshops on special topics. Most variations were made for the northern pastoral and dairy industries, to suit their particular lifestyle, land management and enterprise issues.

Workshop program statistics, as at 31st December 1996 are given in Table 2.

* Primary Industries SA

Table 2. Participation in the PMP Core Workshop Program to 31/12/96

	Groups	Businesses	Participants
Ongoing	30	351	509
Completed	92	996	1386
Total	122	1347	1895

The groups were located in Regions as follows:

Office & Region	Completed Groups	Ongoing Groups
Clare – Lower to Upper North, YP, Barossa	17	4
Loxton - Murray Mallee, Lower Murray, Murray Plains	8	7
Mt Barker – Hills, Fleurieu,	14	1
Mt Barker/Kingscote - KI	4	1
Pt Augusta – Pastoral, Upper North	5	5
Struan – South East	12	5
Pt Lincoln – Eyre Peninsula	32	7
Total	92	30

Each group had the basic 7-8 “core” workshops, and sometimes extra workshops were necessary to adequately address the issues, for example in mixed enterprise groups. Supplementary workshops on specialist topics (eg. revegetation, succession) were also provided when groups identified the need. Complete records are not available for these workshops but for example, of 152 workshops delivered from the Mt Barker office, 34 were extra and 11 were supplementary.

Some characteristics of the people and businesses that participated in the group workshop program are shown in Appendix 3.

3.3.3 Awareness Seminars

To foster support for Property Management Planning amongst existing and potential advocates, half- to two-day seminars were held to increase understanding of the process and the workshop program. The events were primarily an abridged run through the workshop program, a folder of notes and work sheets being provided to each participant. Seminars were delivered to:

<u>Professional Group</u>	<u>Number of Seminars</u>	<u>Attendance</u>
PISA Extension Officers	6	110
Bankers – rural specialists & managers	10	160
Rural Counsellors	3	15
Farm Consultants and Accountants	4	60
Elders P/L	2	20
Clergy	1	12
Soils Boards	27	190

3.3.4 Special Events

After the good grain harvest of 1994 a tax and financial planning seminar called “*Big Wheels, Big Deals, Where to Now?*” was held at 8 grain growing centres. It provided information to help farmers manage and utilise their income in a planned and strategic way. It was organised by the PMP project with contributions by other agencies and individuals. Total attendance was 267 farmers from 168 farm businesses, and 76 professionals (bankers, accountants, consultants government and private, etc). A report of this event is available from PMP management at Clare.

In 1994 PMP cooperated with accountant Peter Hayes & Associates, solicitor Judith Choate, and Westpac Bank, in organising and presenting seminars on Succession Planning at Cummins, Jamestown, and Murray Bridge, at which there was a total attendance of 210 farmers.

Property Management Planning also collaborated closely with the SA branch of the Australian Farm Management Society in several of their seminars and forums.

3.3.5 Materials

The Property Management Planning Extension Resource Manual, first drafted in Stage 1, and consisting of reference notes, work sheets and activities for facilitating the core workshop program, was further developed and refined by the project team. There were significant contributions by other PISA officers, especially to the natural resources and enterprise workshops. It was used in successive draft forms throughout the Campaign and published as a saleable product in February 1997. Adapted versions of the Manual, mainly of the Enterprise and Layout workshops, were developed for the rangelands and dairy industry, and used in draft forms through this stage of the Campaign.

PMP Workshop Kits consisting of a titled clip-ring folder, writing and drawing items, contained in a customised plastic satchel, were prepared at the Clare office and given to each business at registration in the Core Workshop Program. Participants paid \$70 for registration plus kits. Copies of reference notes and work sheets from the Extension Resource Manual were given to participants to add to their folders as they progressed through the program.

A PMP Summary Document was also prepared and provided to participants. It is a ring folder containing record sheets on which participants record the essential features of their Property Management Plan in a presentable form.

During 1996 the PMP team developed *A Facilitators Guide* – a resource for developing session plans for the core workshop program. It contains ten example session plans for all the workshops from *Introduction to PMP* to *Business Plan Review*, and is a useful starting point for workshop planning. It was published in 1997.

A video – “*Making Plans*” – was made in 1994 to promote the Property Management Planning program. Three hundred and fifty copies were made and distributed to SA PMP Officers, State PMP Coordinators, Rural Counsellors, SA government and non-government stakeholders, and interstate government agencies. It proved to be a useful resource especially in Introductory Sessions to potential participants.

In the same year two coloured glossy promotional publications were made for wide distribution – the booklet “*Making Plans*” and the “*Property Management Planning Workshops*” three-fold brochure. A rangelands version of the latter was produced in 1995.

3.3.6 Publications

Two papers were presented at and published in the proceedings of the first National Conference on Property Management Planning in Adelaide in October 1993:

Delivery of Property Management Planning in Rural South Australia, D Heinjus & S Read
Financial and Business Planning as an integral component of PMP, D Heinjus & S Read

Property Management Planning Officers presented papers at the SA State Landcare Conferences from 1994 to 1996. They exhibited a poster display at the National Landcare Conference in Tasmania in 1994.

The PMP Campaign contributed to the funding and content of several PISA publications:

The Tractor Log Book (which enabled recording of all paddock information
needed for Enterprise Evaluation of crops)
Feeding Sheep (especially applicable to drought feeding)
Feeding Beef Cattle (includes drought management)

Project Leader D Heinjus published a paper in “The Australian Farm Manager” (vol 5, no 3, 1995) titled “*The principles of farm business planning*”.

Several papers were written in preparation for the second National Property Management Planning Conference at Coff’s Harbour in March 1997.

- *PMP as a component of the Eyre Peninsula regional strategy, S Guerin & S O’Brien*
- *Strategies for continuing communication on PMP in the rangelands, P Erkelenz & K White*
- *The power of two (or more) – the importance of partnerships in PMP, P Erkelenz*
- *Teams and networks, J Squires*
- *Vegetation Planning – where does it fit into PMP? J Turner*
- *What is an Integrated Workshop Series? S Read & S Mulligan*

3.3.7 Interstate and National Initiatives

At the end of 1994 a National Land Management Task Force was established to examine the rapidly changing situation facing Australian farmers and their ability to make informed

decisions about their long term profitability and the sustainability of their land and water resources. The South Australian Property Management Planning project team made a significant contribution to the Task Force, including hosting the attendance of the Prime Minister at a workshop on Eyre Peninsula. In the Task Force's report, "Managing for the Future", South Australia's Property Management Planning program was favourably reported upon as a model for other States to adopt.

Soon after the release of the Task Force report in October 1995 there were requests from other States to learn more about the SA program resulting in several interstate visits by project members.

September 1995: D Heinjus & S Guerin to Sydney, New South Wales. Delivered a training workshop on the SA PMP program, with a view to NSW developing an integrated workshop program for "Farming for the Future".

October 1995: D Heinjus & P Erkelenz to Yeppoon, Queensland. Familiarised Queensland staff with the SA workshop program, leading to renewed enthusiasm, expansion and improvements for their own program.

March 1996: P Erkelenz & S O'Brien to Northern Territory. This led to the first PMP group in NT, primarily facilitated by P Erkelenz providing training and encouragement to NT staff (NT Border Districts group, started March 1997). Other groups soon followed in the Alice Springs and Barkley regions.

October 1996: D Heinjus, C Scheid & S Holden to Horsham, Victoria. One-day workshop on South Australia's PMP program to Victorian 'Farm\$mart' managers, facilitators, regional management committees and farmers. Ideas used in their program.

December 1996: P Erkelenz to Carnarvon, Western Australia. Familiarised Southern Rangelands (WA) staff with the workshop program as delivered in the pastoral zone of SA, which gave them incentive and confidence to promote and deliver their own program. The Southern Rangelands experience had a stimulating effect on progress in other regions.

Most of these visits were reciprocated on one or more occasions, and there were other interstate exchanges by individual officers with NSW and Victoria.

D. Heinjus attended the Rural Finance Summit in Canberra in 1996

3.3.8 Promotion And Group Formation

The PMP Campaign and particularly the core workshop program were widely publicised in the local and state rural press (see Appendix 8 for examples), in local newsletters (eg *Across the Myalls* in the Northern Region, see Appendix 10), and on local and state radio. Awareness seminars were effective in gaining the understanding and support of advisers in agribusiness and PISA. There were also numerous one-hour presentations (formal and informal) to groups and individuals, especially by the Project Leader, to gain support for the program.

At the local level Introductory Seminars were usually presented to explain the program, and give an appreciation of the benefits and need for an effective planning process. The result was usually groups of farm businesses committing to the workshop series, some further canvassing sometimes needed to obtain the preferred number of 8-15 businesses.

A large visual display was produced describing the process and benefits of PMP and including testimonials by participating farmers. It was put up and attended by PMP officers at many field days and shows around the State, including the Yorke Peninsula, Eyre Peninsula, Lucindale, Karoonda, Hart, and Mt Compass Field Days.

When the "*Making Plans*" video was completed the opportunity was taken to have an official ministerial launch of the PMP program on 12th December 1994.

Existing groups were often the genesis of PMP groups, especially Landcare groups, Agricultural Bureaux and industry discussion groups. Of the 122 groups subscribed to the program to 31/12/96, about 20% were based on Landcare groups. Landcare members had a 37% participation in PMP workshops (cf 32% nationally) and non-Landcare members only 12% (ABARE Research Report 98.4). Landcare Officers helped with group formation and sometimes assisted in delivery of the natural resource management workshops.

Some groups were formed to do PMP as part of a catchment planning initiative, for example the Todd River and Cummins-Wanilla Basin groups on Eyre Peninsula, and the Rodwell Creek group in the Adelaide Hills.

Some attempt has been made to target market segments for uptake of PMP. In the Eyre Peninsula region the farming population was segmented into categories based on natural resource management problems, attitudes to land management and making money, their abilities and liking of certain aspects of farming, their stage of farm business development, and attitude to more knowledge and learning (see Appendix 4). The adoption of PMP in this region received a further boost in 1996 with the advent of the Eyre Peninsula Regional Strategy, which provided additional State and Commonwealth funding to support a series of projects to assist farmers to become more sustainable and viable (see Appendix 5).

In the South-East emphasis was placed on targeting areas where PMP would have the most natural resource benefit and/or economic impact, to comply with PISA's primary objectives.

In regions where farming is more mixed, especially the Hills and Fleurieu, targeting and formation of groups was mainly industry based. The main differentiation was between cropping, sheep and beef, and dairying. Some groups were of mixed farming type in order to get sufficient participants within the local district, however it was generally felt better to have homogenous groups.

Near Adelaide, and to a lesser extent near larger country centres, lifestyle or hobby farmers were a significant group of PMP clients. Because PMP was primarily designed for full time farmers, the part-timers were not a specially targeted group, but were nevertheless attracted to PMP, comprising about 40% of the participants in the Adelaide Hills.

The first edition of the PMP newsletter "Planning Links" was published in December 1994. It was initially for internal distribution in PISA (see Appendix 9) but was later (1997) upgraded and sent to all past participants and external stakeholders.

3.3.9 Training

Initial training of the PMP Officers in the objectives and the delivery of the workshops was done on the Slater family farm at Curramulka on the Yorke Peninsula. Training included developing and learning the PMP process by working through the farm's Property Management Plan, which had been started as a case study in Stage 1. The first draft Extension Resources Manual was developed a stage further, adding to and improving the planning processes and delivery methods it contained.

Following that initial training, there were regular 3–4 monthly PMP Team meetings, discussing progress and making plans for the program. These were excellent training sessions in themselves, but usually included segments that were specifically training, such as financial planning, land assessment, and providing feedback to peers. Reciprocal attendance by PMP Officers at each others' workshops enabled "peer reviews" to occur.

The Team Meetings were often attended by other PISA and non-PISA officers, especially during the training sessions at which the learning was reciprocal.

There were also special training events that many of the PMP Team attended, including:

<u>Program</u>	<u>Provider</u>
• Creating Effective Farmer & Other Client Groups	PISA
• Presentation & Training Techniques	TAFE *
• Technology of Participation	Kevin Baum
• Farm Business Management, Financial	PISA
• Climate Variability	SARDI** and Bureau of Meteorology
• Delivering Services to Primary Industries	PISA
• "Grazing for Profit" (introduction to)	Resource Consultancy Services

The full one-week *Grazing for Profit* course was subsequently attended by S Read and D Furphy in July, 1996 (and by C Scheid in July 1997). This resulted in the introduction of some useful new ideas to the PMP program.

As well as attendance at the Awareness Seminars and PMP Team Meetings as relevant and as time permitted, other PISA extension staff (agronomists; soils, livestock, revegetation officers etc.) became familiar with the PMP process through their contribution to the workshops and the development of the Extension Resource Manual.

3.3.10 Linkages, Partnerships & Supplementary Training

PMP endeavoured to establish links with many other providers of information and training

* Department of Technical & Further Education

** SA Research & Development Institute

in farm business, land management and productivity, with the purposes of promoting and improving the program and extending the process. This was done with PISA* and DENR** staff, agribusiness, TAFE, Rural Counsellors, farmer organisations, industry groups etc. by seeking their involvement in program development and delivery, having joint meetings and training sessions, and collaborative delivery of special workshops for farmers. On Eyre Peninsula the Engineering, Water & Sewage Department was involved with the Todd River PMP group, because of their interest in the effects of catchment management practices on water quality in the Todd Reservoir.

Supplementary training courses or workshops developed and delivered in partnership with other providers have been:

- Computer programs for Farm Business
- Risk Management for Rural Businesses
- Succession Planning for Farm Families
- Wool Marketing

The Consultative Committee included representatives from other agencies and individuals with an interest in PMP, which provided an ongoing formal link with agencies and programs outside PISA.

From its start the PMP Campaign was aligned with PISA's Rural Finance and Development branch. PMP clients could be eligible for funding under the Financial Management Advice Grant Scheme, reshaped as "Farm Plan" from 1st July 1994. Under stage 1 of the grant - the review of all aspects of the business including Landcare issues - successful applicants were reimbursed the registration and materials fee for the PMP workshop series. However the number of PMP clients that received support from the Farm Plan scheme was limited by means test.

Further detail on PMP's linkages with other agencies and programs is given elsewhere in this report (sections 3.3.3, 3.4.6, 3.4.7).

3.3.11 Evaluation

Efforts were made at an early stage to develop methods of evaluating the PMP Campaign, particularly the workshop program. Bennett's Hierarchy was used as a model for different levels of evaluation (see footnote page 20).

An attendance register was kept for all groups, listing members' names, contact details, and main enterprises, and attendance was recorded at each workshop. The register provided information on the Program's workshop activities (Bennett's Hierarchy, level 2) and on the amount of participation (level 3). Workshop statistics are summarised in Table 2 on page 11.

Usually in the second half of the workshop program, participants completed a "PMP Participant Survey" form which collected information about individual participants (level 3).

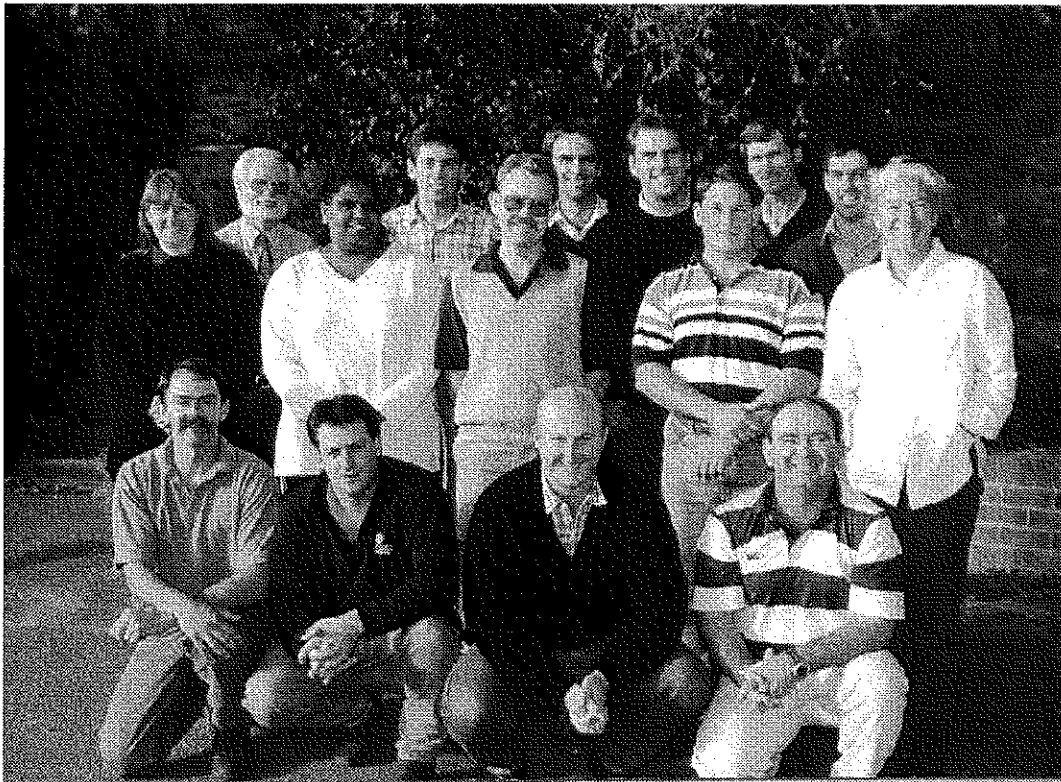
* Primary Industries SA

** Department of Environment & Natural Resources

This was first presented on a regional and state basis in a "Summary of selected information from the PMP Client Survey", July 1996, compiled by S Read & K Geyer. Appendix 3 presents information from this client database updated to December 1996.

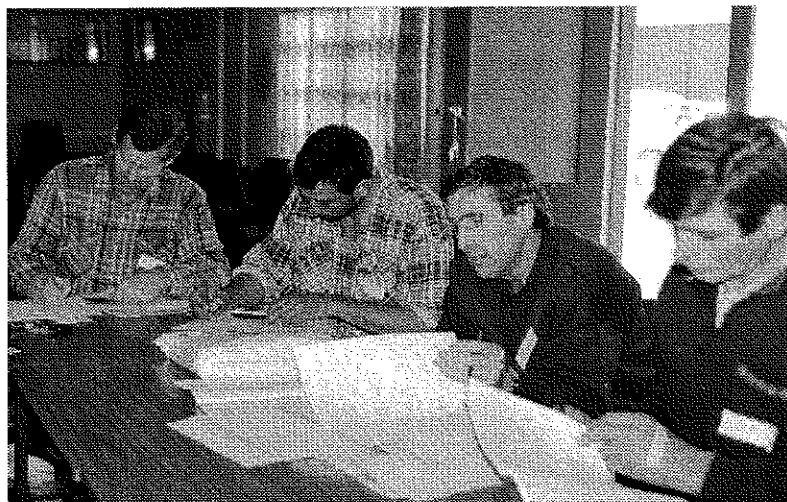
Participants were encouraged to complete workshop evaluation sheets after each workshop, and also an exit survey at the last workshop. These provided information on reactions to the Program (level 4) and to some extent perceived change in knowledge, attitude, skills and aspirations (level 5). Comments received were continually considered and used by the facilitators to moderate and adapt the Program to clients' needs. Appendix 2 contains statements from participants taken primarily from exit survey sheets.

From June 1997 to June 1998 the Australia-wide PMP Campaign was the subject of a National Evaluation directed and reported by van Beek, Claridge & Frank, through the Centre for Integrated Resource Management, University of Queensland. South Australia's participation in the National Evaluation is shown in Appendix 1.

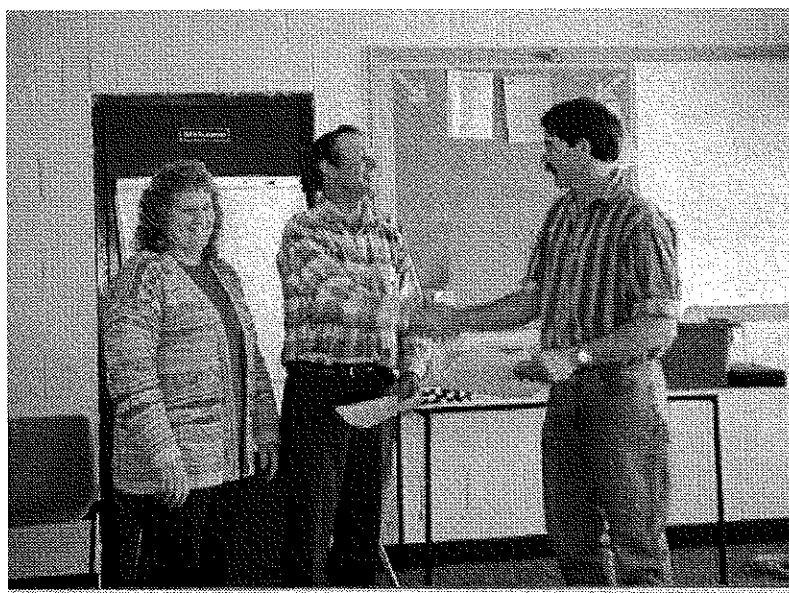


The Property Management Planning Team (SA) 1993-1996

- Back row: Roger Wickes (Director, Sustainable Resources), David Furphy (Irrigation program), Paul Erkelenz, Simon Read, Richard Williams, Chris Scheid.
- Middle row: Kerry Geyer, Aileen Shannon, Scott Norton (Irrigation program), Peter Willmott, Jean Turner (Revegetation).
- Front row: John Squires, Sean O'Brien (Eyre Peninsula Regional Strategy), David Heinjus (Program Manager), Simon Guerin.



Members of the Pinnaroo PMP Group at work in the Livestock Enterprise Evaluation workshop.



Sue & Robert Nitschke of the Brown's Well PMP Group in the Murray Mallee receive their PMP Attendance Certificate from PMP Officer John Squires.

3.4 Achievement Of The Objectives

The extent to which the objectives of the PMP Campaign in SA have been achieved can be assessed from:

- recognition of the activities that were delivered, and the level of participation
- reports from participants in those activities
- evidence of changes in farm management and business practice
- reports from observers of the program some of whom were contributors to its delivery.

The methods used to obtain data for evaluation are outlined in the previous section 3.3.11.

Beyond level 3 of Bennetts Hierarchy (see footnote) of evaluation, evidence for achieving the objectives is based on what people have said about the program and how they have responded to it. Even if more objective information were available it would be difficult or impossible to separate the effects of PMP from the effects of other programs and influences.

In evaluating the PMP Campaign in SA much has been drawn from the National Evaluation (SA State Report) by van Beek, Claridge & Frank, 1998. Where possible information pertaining to the achievement of the objectives of the PMP Campaign in SA has been included in this report, referenced as van Beek et.al. Where national findings are given they are very likely to also reflect the situation in SA.

3.4.1 Principal Objective 1: *Ensure that the policy, research and development framework and planning data are adequate to support the development at the regional and district level of coordinated land resource management plans and action programs that incorporate community, landholder and industry ownership and commitment.*

The Campaign from the outset involved district and regional soils and natural resource management officers who were working on the process for preparing regional development strategies and local action plans. Their involvement with PMP, both in its development and delivery by participation in workshops helped formulate the framework for planning on the broader scale, and identify district and regional resource management issues for consideration.

Through the involvement of members of the community – Soils Board, Landcare, Catchment Group members etc. – PMP helped progress natural resource management in the community by facilitating its integration into whole business planning. PMP has developed “a relevant framework for integrated strategic planning of physical economic, ecological and social information, and an effective means to present and use this framework” (van Beek et.al).

Note: Bennett’s Hierarchy is a partitioning of evaluation criteria into 7 levels:

level 1 “resource inputs”, level 2 “activities”, level 3 “participation”, level 4 “reactions”, level 5 “change in knowledge, attitudes, skills, aspirations”, level 6 “practice change”, level 7 “end results of practice change”.

3.4.2 Principal Objective 2: *Landuse decisions by landholders are based on district standards outlined in appropriate District Plans that integrate action with respect to soil, water, vegetation and wildlife.*

During Stage 2 of the PMP Campaign in South Australia, 18 of the 27 Soil Conservation Board districts had District Plans; the remainder were in their developmental phase. The Plans were made available to PMP participants, who were encouraged to apply the principles and recommendations they contained to their individual property plans.

The principles of land capability classing was a central theme of all District Plans, and landholders who participated in the PMP workshops developed an understanding of land classes and limitations to productivity, and their appropriate use and management. This was most necessary to enable landholders to apply guidelines from District Plans to their own situation.

The priority issues in District Plans were discussed in the Natural Resource Stocktake, Enterprise, and Layout Planning workshops. Landowners were encouraged to incorporate district recommendations for land utilisation and natural resources management into the physical development and land management plans for their properties.

In most cases their plans are being implemented as appropriate on-ground action eg. reducing cropping intensity on wind erosion-prone sand hills, revegetating areas prone to salinity with saltbush, replacing pasture on waterlogged/wet areas with timber producing trees, raising the intensity of land use on suitable land to continuous cropping or horticulture.

At this stage of district and regional planning farmers did not generally regard district benefits as being a priority motive for doing PMP. However as put by one farmer in the Bremer-Barker Catchment planning area, the program *"united local interested farmers in expressing similar goals and planning procedures. It increased awareness and understanding of many facets of sustainable agricultural practice. It renewed hope that we'll be able to halt and reverse widespread land degradation problems, not only for the benefit of individual farms, but also to improve the opportunities for local and regional areas."*

ABARE (98.4) reports that the percentage of all farm plans (not only PMP) in SA that took account of a district, catchment or regional plan was only 28% (cf. 44% national), so it appears there is much scope for more appreciation of district needs in on-farm planning.

3.4.3 Principal Objective 3: *The causes of land and water management problems are identified correctly and effort concentrated on prevention and rehabilitation rather than the symptoms.*

The natural resource stocktake workshops, in addition to the main focus on land classification, enabled landholders to consider the location of land and water problems

and to assess their causes. Prevention and rehabilitation practices were subsequently incorporated into their property layout and management plans.

The most common problems of wind and water erosion, soil and water salinity, acidity, low fertility, non-wetting sands and low water holding capacity have been addressed by PMP participants and alleviated by preventative and rehabilitative measures. PMP Workshops provided a useful forum for identifying these issues, helping with the information collection and development of remedial practices for catchment, district and regional plans.

3.4.4 Principal Objective 4: *Problem control strategies are integrated into overall sustainable land resource management and protection programs, that include the physical management, land use and financial management of a property, taking into consideration climate variability and other management and market factors.*

PMP provided a process for evaluating and planning the whole farm business, considering economics and people as well as land and water management, and the management of prime land as well as problems areas. Through the workshop program, problem control strategies were considered and planned as an integral part of the whole farm business. Examples include:

- planning crop rotations and tillage practices to minimise wind erosion risk,
- incorporating refencing and revegetation programs into the long term financing of the whole farm program,
- establishing lucerne in place of crop/annual pasture rotation to ameliorate salinity risk,
- the costs and benefits of spreading clay on 'non-wetting' sands to prevent wind erosion and improve crop production.

PISA officers specialising in areas such as soils, salinity, soil acidity, crop and pasture agronomy contributed to the workshop program to ensure that this integration occurred.

The National Evaluation (van Beek, et.al) found that "PMP has contributed to a recognition of the need for, and shown the value of, assisting producers in the process of integrating soil, plant, animal, economic and social data and issues".

Although inclusive of all farms (not confined to PMP clients), ABARE surveys show how the composition of farm plans has changed during the 3 years of this project (see Table 3).

It is reasonable to conclude that the increased proportion of farm plans that contain maps or aerial photos, information on soil and land capability, details of land-care work, information on areas of conservation value, and strategies for drought management, is associated with participation in the PMP program. The great majority of South Australian farm plans also contain crop/livestock paddock performance records, a farm operating budget, and personal or family goals (much more so than the national average); further testimony to the integrated whole farm planning process delivered to nearly 1000 businesses by PMP in South Australia (plus 350 ongoing, see Table 2).

Some statements from participants relative to Principal Objectives 3 & 4 are given in Appendix 2(B).

Table 3. Selected features of farm plans in South Australia. From ABARE Research Reports 94.6 & 98.4

<i>Farm plans which contain</i>	<i>SA 92/93 %</i>	<i>SA 95/96 %</i>	<i>Australia 95/96 %</i>
Map or aerial photo	90	96	94
Information on soils/land capability	56	63	69
Details of Landcare work, existing or proposed	36	46	61
Information on areas of conservation value	48	69	49
Drought strategies	42	51	43
Crop/livestock paddock performance records	52	88	51
Farm operating budget	73	88	58
Personal or family goals	-	83	50
Reference to neighbour's plan	-	22	49
Reference to district plan	-	28	44

3.4.5 Specific Objective 1: Incorporation of drought preparedness and risk management planning into PMP training which improves the decision making capability and management skills of participant landholders.

3.4.5.1 Decisions and Skills

Landholders participating in PMP have been through an 8-9 workshop process using numerous aids and techniques to assist in the evaluation and planning of all aspects of their business. Although not objectively measured it is reasonable to assume that the process has effected improvements in decision and management skills. The extent of improvement has varied with the individual, much dependant on their motivation and attentiveness and on the stimulus and incentive provided by the facilitator. Some participants diligently work through the whole process (the minority), others will only think their way through, committing little or nothing to paper (also a minority). However all, including the latter, learn at least some new skills, and are sufficiently impressed by them to be very likely to continue using them.

The National Evaluation Past Participant Questionnaire found that, of farmers participating in PMP in SA:

- 95% (cf 92% national) had gained skills and/or knowledge
- 62% (cf 73%) are more likely to discuss issues with others in the farm business or family, and
- 57% (cf 63%) are now more self-reliant in seeking information for problem solving, than before attending PMP (van Beek et.al).

3.4.5.2 Communication

One of the major achievements of the PMP Campaign has been the apparent improvement in communication between members of farming teams, an undoubted benefit to decision making and management skills. Communication was an essential part of the Human Resources workshops and indeed an underlying theme throughout the program. Statements from participants attest to the value of this aspect of the PMP program.

See Appendix 2(A) for statements from participants about PMP, decision making and management skills, including communication.

3.4.5.3 Risk and Drought

We have considered risk management to be almost synonymous with PMP. The primary way to make a farm business less risky is to ensure that it is well managed and planned, increasing its preparedness and ability to withstand the advent of unfavourable changes in markets, prices, finance costs, or production conditions. Where the PMP process has improved farmers' management and planning skills, their management of risk has improved. The management or minimising of risk is based on increasing the likelihood of right decisions and farmers have practiced many decision making tools through the PMP workshop process, varying from land classification for making land use decisions to development budgeting for assessing diversification prospects.

A one-day workshop, "Risk Management for Rural Businesses", presented by Mike Krause and Associates, has been well received by PMP groups. The TAFE publication, "Risk Management in Agriculture and Horticulture" has been promoted at these and other PMP workshops.

Drought Management has been incorporated into the PMP workshop series as an important aspect of risk management. The subject of rainfall deciles and their use to predict seasonal outcomes and make best management decisions has been covered in detail in the Extension Resource Manual. Most groups in cropping areas have had part or separate workshops on this topical area of risk management.

A culling strategy planning sheet for sheep and cattle producers has also been included in the Extension Resource Manual, enabling them to list culling priorities in the event of drought.

ABARE reports that the percentage of farm plans in SA that contain drought management strategies has risen from 42% to 51% during the course of this project, and this is higher than the national average (see Table 3).

Drought has been the catalyst for farmers in many areas to improve their land management practices and sustainability. On the Eyre Peninsula it had much to do with the development and funding of the Eyre Peninsula Regional Strategy, with which Property Management Planning was closely affiliated. Appendix 5 gives details of the Strategy, and a "Farming to Land Capability" case study of a PMP workshop program participant.

3.4.5.4 Implementation

It is evident that plans made by farmers during the PMP workshop series are being implemented, aided by the improved management skills and decision-making abilities they have acquired.

In the National Evaluation, 77% of SA respondents to the past participant questionnaire (cf 79% national) agreed they had made changes to their management practices as a result of involvement in PMP. Interviews of PMP participants revealed widespread impact of PMP on physical property planning, business planning and communication. Some of the interviewees saw no obstacles in implementing their plans, while others saw shortage of money, time and market uncertainty as obstacles. Implementation was normally a gradual process. Several interviewees could see new opportunities in farming.

Statements written by farmers on their PMP workshop program exit surveys indicate the type of things they intend to implement as a result (or part result) of PMP (see Appendix 2B & 2C).

3.4.6 Specific Objective 2: *To generate support and understanding of the role of PMP, and the need for improved decision making capacity of landholders, in advisers from banks, agribusiness, consultants, education institutions, etc.*

The achievement of this objective was founded in the Awareness Seminars (section 3.3.3). The seminars were extended to many of the potential advocates of PMP, all of whom developed an appreciation of the usefulness of PMP to landholders and were supportive of the program. The ANZ Bank and Bank SA attended the seminars, and Bank SA in particular has supported the PMP concept by reviewing interest rate margins of farmers who develop an effective plan.

In addition to the seminars an appreciation and understanding of PMP was continuously extended to other agents and agencies by their involvement as appropriate in the workshop series:

- bankers, accountants and consultants mainly in Business Position and Planning workshops
- industry consultants in Enterprise workshops, and
- rural counsellors and accountants (with a specialty in succession planning) in Human Resource workshops.

The supplementary training courses or workshops delivered in partnership with other providers (3.3.10) have also each increased the cooperating presenter's understanding of PMP and contributed to the program's promotion.

The Commonwealth Bank has responded to the purposes and partnership efforts of the PMP program, and is developing a one-day workshop on Credit Risk Management to be delivered as a supplement or follow up to the PMP workshop series.

Collaboration with TAFE was always intended and to this end a joint meeting of the TAFE Rural Management Team and PISA's PMP team was held in August 1996. It achieved a two-way understanding of their respective programs and various mutually supportive initiatives were proposed. Outcomes of the day were an increase in the attendance and contribution of TAFE lecturers to PMP workshops, and added encouragement given to PMP participants to progress into the 2 year TAFE Rural Business Management course and others.

However, the extent of collaboration intended between the two programs had not eventuated by the end of this stage of the PMP campaign (December 1996).

PMP established links with the Australian Farm Management Society, both having very similar objectives. In 1995 a one page newsletter about PMP was a regular insert in the AFMS magazine "Grow", and the PMP Program Manager began a term on the AFMS executive.

3.4.7 Specific Objective 3: *To promote further training and skill development opportunities for landholders.*

PMP has given landholders a format for determining their strategic direction with respect to all aspects of the business (natural resources, people, enterprises, finances), and has identified goals to be achieved and further skills and knowledge required. Some further learning opportunities have been taken during the workshop program eg. special workshops on risk management, revegetation, climate variability, succession planning.

At the end of each group's workshop series, on-going learning needs were reviewed, and information and encouragement given for relevant courses, programs or activities. The TAFE Rural Business Management course was especially promoted, as were industry programs, such as TopCrop and Prograze, often with a positive response, eg. Coomandook, Wunkar and Wanbi groups in the Murray Mallee moved on to TopCrop. Some PMP groups stayed together as Discussion Groups, for example two dairy groups at Meadows and Mt. Torrens, incorporating the PISA Pasture Consumption and Dairy Farm Business Analysis techniques into monitoring and evaluating their businesses.

70% of PMP participants in SA want to participate in more learning activities as a result of their involvement in PMP (cf 73% nationally), and 69% (cf 72%) have maintained contact with other members of their PMP group (van Beek et.al). Participants often expressed the desire for further learning and review activities (see appendix 2D).

It is proposed to have an "Annual Review" workshop for every group - some have already been held. The format is basically a refresher of the PMP core workshops and planning process, reflecting on what plans have been implemented or changed, a review of goals and plans for the future, and identification of further training activities needed to help their achievement. The Annual Review with past clients is considered an important activity for

the next stage of the PMP Campaign, to further emphasise and reinforce the value of property management planning as a continual process.

Finally in assessing the achievements of the project, and with reference to the overall objective of the PMP Campaign in SA, the learning of the PMP process through the workshop series made a significant contribution to developing the total business management skills of farmers in South Australia.

In *“Managing for the Future”*, the Land Management Task Force reported very favourably on the holistic integrated workshop approach to PMP adopted by South Australia, and Tasmania. In their view the strength of that approach is that it “provides members of farming families with a full and integrated understanding of property management planning and enables learning groups to form which can provide ongoing peer support”. The learning of the PMP process has increased the total business management skills of farmers.

The Task Force recommended that the whole systems approach to property management planning, incorporating all the key factors which affect the performance of the business, as applied in the SA program, “needs to be accepted as best practice in Australian agriculture and should be applied universally in the design of workshops, and other learning activities for producers.....”

4. KEY LEARNINGS AND FUTURE DIRECTION

4.1 Marketing

As described above under “Methodology” vigorous attempts were made to extend PMP as widely as possible, using all the conventional means of promotion, to a reasonable degree of success. However, PMP officers were soon fully occupied running their groups and continuing promotion was not as strong as it could have been. One of the respondents to the National Evaluation questionnaire said *“PMP has gone very quiet in my area. If it is still running I have not been contacted”* (van Beek et.al).

It is likely that an officer specially responsible for publicity for the PMP Campaign in SA would have significantly increased the program's uptake. Nevertheless, an SA Rural Training Council representative said, *“PMP has a good reputation in SA. Normal marketing is not necessary. Word of mouth is most effective. Profile successful farmers in journals and newspapers”* (van Beek et.al).

The segmenting of the client base on Eyre Peninsula is an attempt at market targeting according to characteristics of farmers other than by type of farming (as was generally done elsewhere). Although resulting groups were a mixture of categories the process increased understanding of the client base and probably benefited subscription to the program, which was higher on Eyre Peninsula than any other region. Adoption of PMP in this region was also undoubtedly boosted by the advent of the Eyre Peninsula Regional Strategy at the beginning of 1996, which augurs well for the stimulus provided by Local Action Plans as they are developed in other Regions.

[Go to Part 2 of this report](#)