

APRIL 2019

Nursery industry career path development strategy

Industry strategy and action plan

Hort Innovation

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Executive Summary

The nursery industry supply chain is a significant sector of Australian horticultural industries, and includes plants grown for horticulture such as fruit and vegetables, landscaping and ornamental retail supply chains, as well as forestry. The sector is valued at more than \$2.4 billion and employs approximately 25,000 people in more than 1,600 small to medium enterprises. Yet the industry, like many other agricultural industries, faces major challenges around high staff turnover and an ability to attract and retain qualified people via offering attractive career pathways.

The industry has a shortage of skilled labour, particularly with respect to supervisory level positions. Remuneration, employment conditions and limited opportunities for career growth and progression are amongst the biggest barriers to attracting and retaining a skilled workforce for the nursery industry. The industry has lost a generation within its workforce, with more than 85% of the current workforce above the age of 40 years. These challenges require immediate actions to secure an immediate, as well as long-term skilled workforce to ensure the continued success of the industry.

This strategy and action plan provide a plan for effective skilled workforce and career path development for the industry in the short to medium term, and longer-term strategies to sustain an interest in working in the industry for the future. The action plan considers the current skilled employment and training situation in the nursery industry and recommends a five-pillar strategy to attract, retain and develop a skilled nursery industry workforce to underpin the economic sustainability and profitability of the sector for the future.

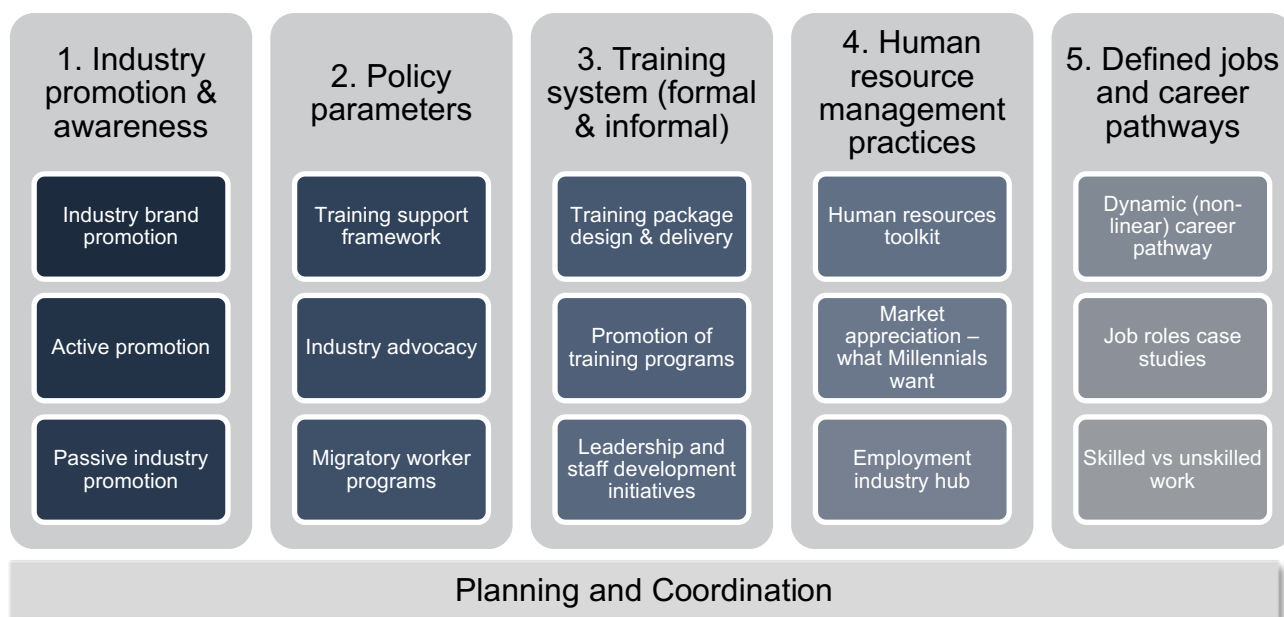


Figure E-6-1: Five-pillar strategy to attract, retain and developed skilled nursery industry workforce

1 Context

The Australian nursery industry is a multi-billion-dollar sector that plays a vital role in the human, environmental and economic well-being of Australia. The diversity, uniqueness and significance of the sector, however, has proved a challenge to adopt a one size fits all model to attract, develop and retain a skilled workforce.

1.1 THE CHALLENGE

Attracting, retaining and developing a skilled workforce is a pressing challenge for all Australian agricultural industries, it is not a unique issue to the nursery sector. Several studies¹ have provided empirical evidence of the compounding issues that are identified to have progressively contributed to the challenge of securing a skilled workforce for agricultural industries, including:

INDUSTRY INHERENT CHALLENGES

- The nursery industry is multifaceted; those not involved in the industry have little understanding of its business structures and activities. It therefore is an 'unknown entity' on the labour market and for career advisers.
- Poor promotion of the industry as an employer of choice, including lack of clear career pathways within the industry and too frequent presentation of a negative self-image.
- Poor promotion of horticulture and career opportunities to people trained in relevant related disciplines such as logistics, business management, IT, engineering.
- Lack of engagement with the education and training sector and promotion of training.
- Lack of regional level collaboration to build skilled and adaptive labour pools.
- Seasonal and casual/part time nature of the work, inhibiting job security, on-the-job training and career progression as well as potentially requiring long working hours during the peak season.
- Industry image, employment conditions including remuneration and skilled supervision, work place conditions (real or perceived).
- Reluctance by the local industry to engage skilled migrant labour or participate in seasonal worker programs due to factors including costs, the length of time seasonal workers may stay, postcode visa restrictions, facilities they have to provide for them, language and cultural barriers, and minimum work hour requirements.
- Small to medium enterprises cannot afford to employ several specialists; they require multi-skilled staff in supervisor and management positions.

CHALLENGES FROM THE EDUCATION AND TRAINING SECTOR

- Low number of people attaining specific agriculture and horticulture qualifications.
- While nursery training packages have been developed by Skills Impact for delivery by RTOs, the system of funding RTOs does not enable delivery of courses unless a minimum of students apply.
- Availability of training courses / services that are relevant, delivered by knowledgeable teachers/trainers accessible in production regions, and cater for people in the workforce at all levels.
- The training sector does not typically promote courses, relies on industry to market courses.
- Training to develop multiskilled staff, particularly soft skill development, is difficult to find or access.
- Apprentices are difficult to find and or the employer has to deal with multiple organisations before being able to employ an apprentice.

¹ Growcom, 2013; AgriFrood Skills Australia, 2015; RMCG & GVFGSWG, 2013

LABOUR MARKET CHALLENGES

- Labour competition from other sectors, including mining and coal seam gas who offer better pay.
- The type of work performed, including manual, repetitive and outdoors.
- Remote locations of some agricultural businesses affecting the ability of partners of those employed to find adequate work, quality of infrastructure in rural areas (e.g. schools, childcare, hospitals, transport).
- The predominant disinterest of local unskilled labour to work in horticulture.

1.2 THE OPPORTUNITY

The Australian nursery industry has recognised that a concerted approach is required to overcome or mitigate the labour challenges. The industry has identified training and development as a significant priority. This is documented in the Nursery Strategic Investment Plan (2017-2021),² with better career development, one of the five industry outcomes identified in the SIP. Identified strategies include:

- Promoting the industry as a professional career choice.
- Identifying future skill sets needed in the industry.
- Collaborating with institutions and other formal and informal training providers about industry training and development needs.
- Consider a 'train the trainer' program to ensure that those who provide training services to the industry have a good understanding of the industry, new technologies and current principles of learning.
- Implementing a young leader and development program.
- Using future innovators and young leaders to promote and adopt R&D and marketing outcomes within the industry.

The development of attractive career paths has been identified as a major opportunity to attract and retain skilled labour.

1.3 STRATEGY AND PLAN

The strategy provides the guiding framework for career path development to support the delivery of the SIP priorities and address the abovementioned challenges. The strategy summaries the extent of the challenges facing the Australian nursery industry to attract, retain and develop a skilled workforce; it provides a clear roadmap for successful career path development in the short to medium term. The strategy should be reviewed and updated every three years to ensure relevancy within the career market.

Actions identified within the plan support the longer-term strategies to sustain a continued interest in workforce development by, and for the Australian nursery industry. The nursery industry will have to identify key measures of success for each strategy action that should be reviewed annually to monitor progress.

² Hort Innovation (2017) Nursery Strategic Investment Plan 2017-2021

2 Nursery industry in Australia

The production and supply chain characteristics of the nursery industry are underpinned by two key areas of the supply of plants for:

Urban and Environmental:

- Residential, commercial, industrial and public gardens, green space and developments
- Environmental and ecological restoration for land management, revegetation, natural area rehabilitation and erosion control
- Cut flower production

Rural and Agriculture:

- Production horticulture for fruit, nut and vegetable production
- Forestry spanning large scale plantations to agro-forestry
- Livestock production properties for forage and animal welfare management
- Medicinal, herbal and remedial products

In 2017-2018, Australia's nursery businesses produced a value of \$2.4 billion worth of green life from the sale of 1.9 billion plants.

There are around 1,650 production nursery businesses that employ almost 25,000 full and part-time and casual employees. The plants are produced across a variety of regions and environments with outdoor production and indoor production totalling 6,229 ha and 1,273 ha respectively.

The production nursery industry businesses cover the length and breadth of Australia, with no two businesses the same. On average, nursery businesses nationally employ 15-16 people, but this ranges from single operator organisations to those with more than 200 employees.

Business diversity in the nursery industry is vast with more than half of businesses considered 'micro businesses' with turnover of less than \$500,000. While 20% of growers are turning over greater than \$2 million per annum.

Businesses nationally report that operating costs as an average percent of turnover are 28% and wages are 38%.

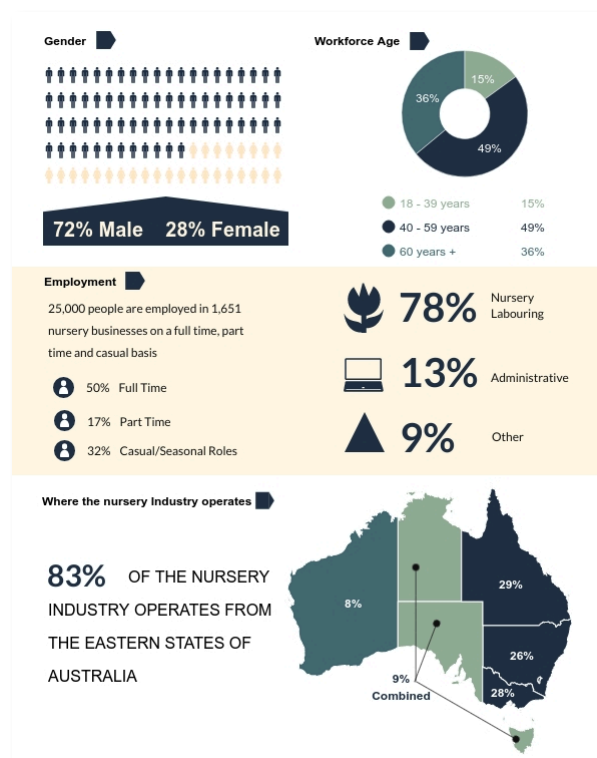


Figure 2-1: Australian nursery sector demographics

3 A skilled nursery workforce

3.1 DEFINING SKILLED EMPLOYEES

An important definition in the context of this strategy is the difference between skilled and semi-skilled employees. A two-tier classification system has been adopted which includes positions that require independent decision-making as skilled jobs ('deciders'), and jobs which are mostly about carrying out instructions provided by others as semi-skilled or non-managerial jobs ('doers').³

The classification of jobs as either a 'decider' or a 'doer' means different skill sets are necessary to perform tasks. Deciders tend to be engaged in managerial positions that rely on strategic thinking, risk management and business planning skills, combined with a sound technical knowledge to make decisions and people management skills to get the job done efficiently. While 'doer' employees need to demonstrate competence in listening, understanding and completing required tasks; have the capacity to identify urgent problems or risks associated with tasks; and the ability to communicate and supervise other staff in implementing day-to-day tasks combined with the required technical knowledge. A classification framework for these job levels is outlined in Figure 3-1.

It is important to note this plan is focussed on the attraction, retention and development of the skilled or decider category of employee. A number of challenges exist for the recruitment of semi-skilled or doer positions, and while the recommendations identified in this strategy would support recruitment strategies for this segment of employee, they are not the primary audience.

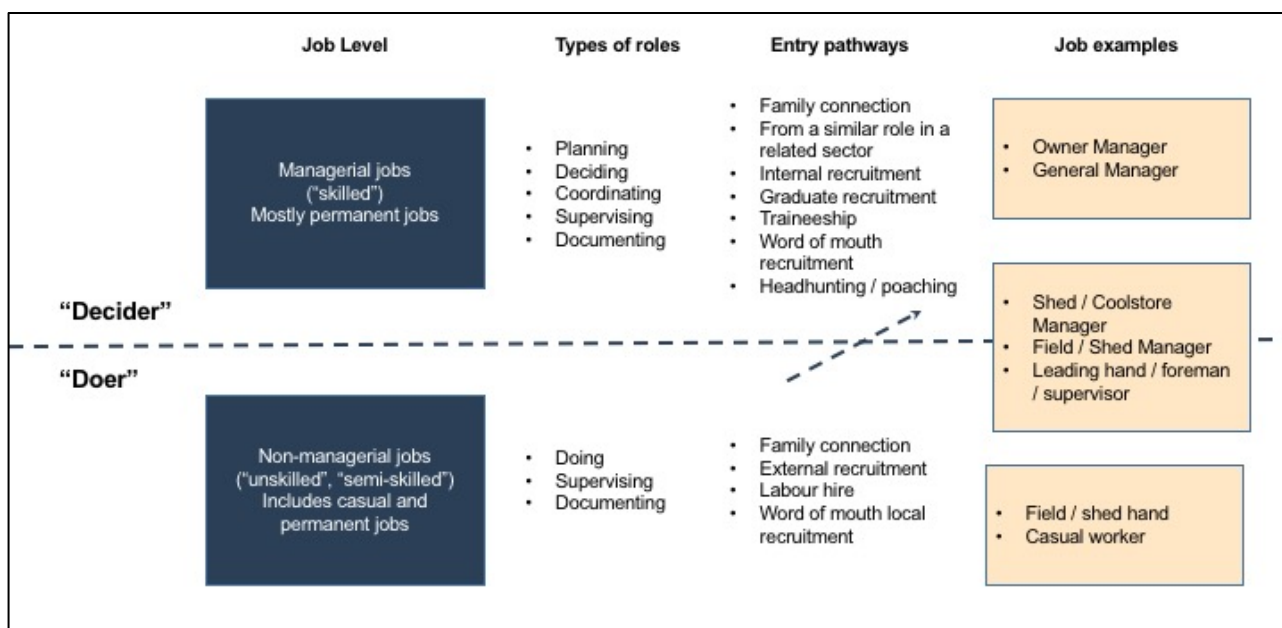


Figure 3-1: Classification of horticulture job level (Adapted from Santhanam-Martin and Cowan, 2017)

³ Santhanam-Martin M and Cowan L (2017) *Understanding Skilled Workforce Issues in the Goulburn Valley Fruit Industry*, University of Melbourne and Agriculture Victoria

3.2 SKILL NEEDS

Over the past decade, horticulture, the third largest agriculture sector in Australia, behind livestock and grains, has moved beyond a 'market garden' mentality, to focus on business acumen including supply chain management, technology, product innovation and export competitiveness. Horticulture businesses of today operate at levels of complexity that did not exist within the industry 20 years ago.⁴ This includes a range of compliance responsibilities in the areas of biosecurity, workplace health and safety, pesticide management, food safety, customer relationships and environmental sustainability.

SKILLS BEYOND JUST PLANT PRODUCTION ARE REQUIRED FOR THE FUTURE OF THE NURSERY INDUSTRY IN AUSTRALIA

A key challenge for the nursery industry is the predominance of small to medium enterprises and their flat business structure; they cannot afford to employ a specialist for each business function. Consequently, multi-skilled staff are required in supervisor and management positions. Additionally, business principles require greater attention as part of regular business activities, due to an increasing need for data capture and management for compliance and business efficiency. Marketing e.g. via electronic media is increasingly becoming a greater responsibility for the business. Business processes, especially quality assurance, accreditation, logistics and supply chain relationships are becoming more complex. To remain viable, nursery businesses must be technologically adept and remain 'cutting edge' with increased automation across the production system, a plethora of precision agriculture applications as well as data monitoring and management systems.

To remain internationally competitive, nursery businesses must be able to attract the best educated and trained people at each level of their workforce pool. Skills beyond just plant production are required for the future of the nursery industry in Australia; business, IT and marketing skills are required. There is a need to secure a continued pipeline of well-trained experts to support the capacity and resilience of the industry into the future.

The Australian nursery sector has a shortage of skilled workers. The full extent of this shortage, with respect to unfilled positions and skill types is undefined. Still, there is industry wide acknowledgement of the challenge faced with the attraction and retention of skilled workers, particularly at a supervisory role level.

Some of the key contributors to this challenge are the ageing industry demographics, with more than 85% of the workforce over the age of 40 years. This significant high percentage of older employees, with very low numbers of young employees, represents a lost generation in the nursery industry workforce.

⁴ Pratley J (2012) The workforce challenge in horticulture, *Agricultural Science*, vol. 4, issue 1, pp 26-29

MORE THAN 85% OF THE WORKFORCE IS OVER THE AGE OF 40 YEARS – THERE IS A LOST GENERATION IN THE WORKFORCE

The current skill gaps identified by the industry are mainly soft skills based, related to people development and staff supervision. Many nursery businesses believe they have the ability to train staff in-house to achieve the required technical competency. Value is placed on access to quality training facilities and study exchange opportunities, largely from a networking and peer learning perspective. Recruitment of potential employees is driven by their willingness and attitude to work as well as previous experience in the industry. Subsequently, a continuing challenge the industry faces is a focus on developing existing or ‘poaching’ staff, rather than external recruitment of employees new to the industry. The lack of focus on technical skills of new employees may lead to the industry missing out on using new technical developments and effective adoption or adaptation of R&D outcomes.

The number one barrier to attracting skilled workers cited by employers is attributed to remuneration and employment conditions. The lack of opportunity for career progression and growth is also considered a major barrier. This lack of opportunities is largely due to the nature of small to medium enterprises that are predominately family owned and operated.

3.3 EDUCATION AND TRAINING SECTOR

There is a national trend of declining enrolment and graduation in higher education qualifications across all of agriculture, including nursery production, at both a vocational and university level.

An example of the extent of the challenge is illustrated in Figure 3-2, which provides a summary of graduate data for all tertiary institutions in Australia offering a horticulture qualification. This downward trend is cause for alarm, as not only do declining graduations affect the availability of skilled workers (less than 40 graduates in 2015), low enrolments also affect the viability of education and training providers. Funding for education and training service depends on enrolment numbers. Low enrolments mean that courses are not viable and delivered, even though the curricular exist in principle. As a result, many of the institutions listed in Figure 3-2 are no longer offering horticulture courses⁵ and relevant teaching staff will have moved on. While there are many institutions and courses offered that have relevancy to the nursery sector, this example of horticulture qualifications highlights the risk to the loss of education and capacity.

⁵ Pratley J (2012) The workforce challenge in horticulture, *Agricultural Science*, vol. 4, issue 1, pp 26-29

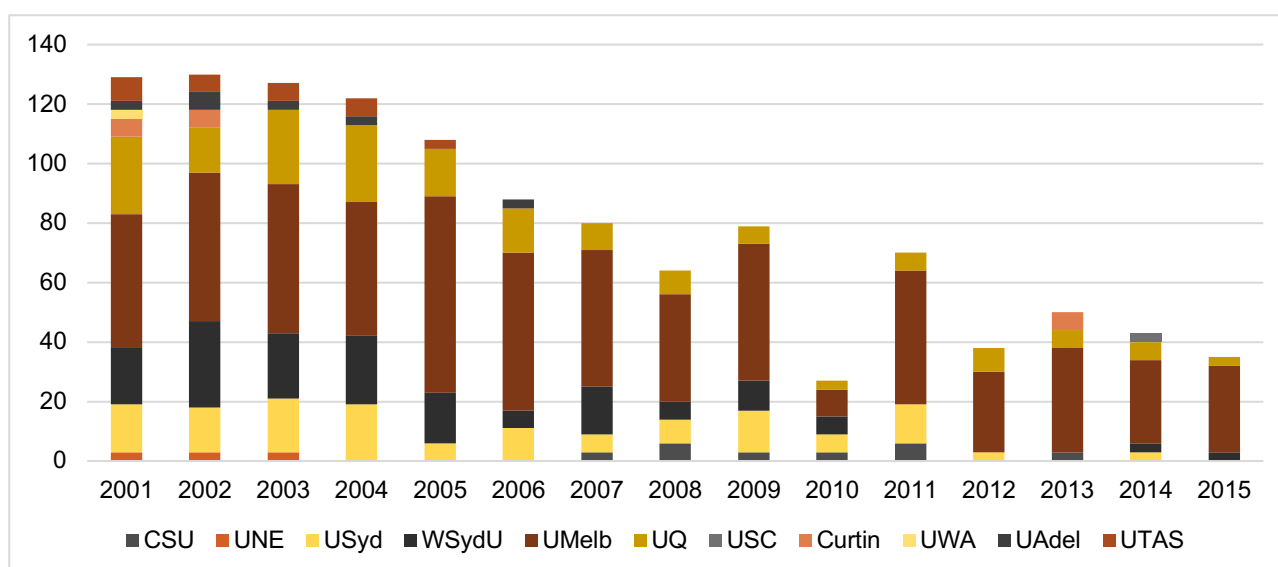


Figure 3-2: Horticulture graduates by university, 2001 – 2015 (Pratley, 2017)

A similar trend to universities is observed in the vocational education training sector. Student enrolments in the Agriculture, Horticulture and Conservation Land Management Training package (AHC10) are weak, which impacts on the ability for many institutions to offer training certificates under the training package and secure teaching staff of capacity to continue to deliver active courses. Again, funding for vocational training is linked to enrolments. Within the horticulture category of the AHC10 package, there are some positive trends for the nursery and garden sector; students are favouring enrolment in amenity horticulture courses over production horticulture. Regardless, nursery qualifications are viewed as being amongst the least popular qualifications with students, with several nursery qualifications often receiving no annual enrolment around Australia.⁶ One of the reasons for the observed decline in enrolments is that providers in the education and training sector do not see it their role to promote training, and the horticultural industry does not actively promote the sector and training opportunities to potential trainees including school-leavers and employment consultants.

NURSERY QUALIFICATIONS ARE VIEWED AS BEING AMONGST THE LEAST POPULAR QUALIFICATIONS WITH STUDENTS, OPPORTUNITIES ARE NOT PROMOTED BY THE TRAINING OR NURSERY SECTOR

3.4 CURRENT INITIATIVES

There are limited examples of coordinated initiatives to attract, retain and develop a skilled workforce within the Australian nursery sector.

⁶ Skills Impact (2018) IRC Skills Forecast and Proposed Schedule of Work 2018-2021 for the Agriculture, Horticulture and Conservation and Land Management Industry Sector

3.4.1 ATTRACTION

Industry awareness and promotion programs are limited, contained to school-based initiatives aimed at raising the profile of gardening in schools, but not of commercial production. These include the Nursery & Garden Industry Australia (NGIA) nationally based KidsGrow program, and state by state initiatives such as the Victorian Schools Garden Award, administered through the Nursery and Garden Industry of Victoria (NGIV). Some individual businesses have trialled school-based apprenticeship and/or work placements programs, but participation is infrequent due to low level interest and participation.

A number of national programs administered through Hort Innovation, including graduate programs through Rimfire Resources, are designed to attract and develop a new cohort of horticulture workers.

Various approaches are taken to advertising of vacant job positions in the nursery industry. However, skilled people outside of the nursery industry looking for career opportunities (e.g. in IT, accounting, engineering, mechanics, logistics) are unlikely to access the information, which is designed for nursery industry members rather than to inform the public about the industry and attract employees. Even if people not familiar with the industry would look at adverts, they could not find information about the industry that would attract them to apply. Careers in the industry are promoted as *an integral part of creating healthier urban landscapes, from large public spaces down to the suburban backyard, balcony or courtyard*. Entry point opportunities are unclear and career development opportunities are inferred only. Websites like 'My Career' or 'Rural Skills Australia'⁷ do not demonstrate the opportunities the nursery industry has to offer for skilled positions.

3.4.2 RETENTION

Employment in the nursery industry offers strengths with year-round workforce demand and favourable geographic locations in close proximity to metropolitan areas, compared to other horticultural industries.

Prospects for employees to stay in nursery businesses are restricted by a lack of career opportunities due to the high proportion of small to medium enterprise employers. Other aspects affecting retention are limited people management skills in the sector; competition from higher paying lower skill sectors, and work conditions including the potential repetitive nature of jobs, environmental factors and physical demands.

Perceptions of the industry are seen to be key barriers to attracting and retaining staff, including an industry images of only attracting '*the workforce reject pool*', being perceived as a 'feminine' trade (in comparison to other trades), and low remuneration. The average income of semi-skilled nursery workers is \$864 per week (lower than all jobs average of \$1,230) as illustrated in Figure 3-3. While this is an indicator of remuneration for unskilled labour, it perpetuates a negative image inhibiting attraction and retention of all staff. Despite this, there is recognition across the industry that while earnings tend to be lower at entry levels, they can quickly increase in line with on-the-job experience, however this is poorly promoted.⁸

Another key source of negative perceptions associated with the industry are employers' poor promotion of the industry. Many are lacking a positive outlook for the industry as an employer of choice or fail to provide development opportunities or working conditions comparable to other trades.

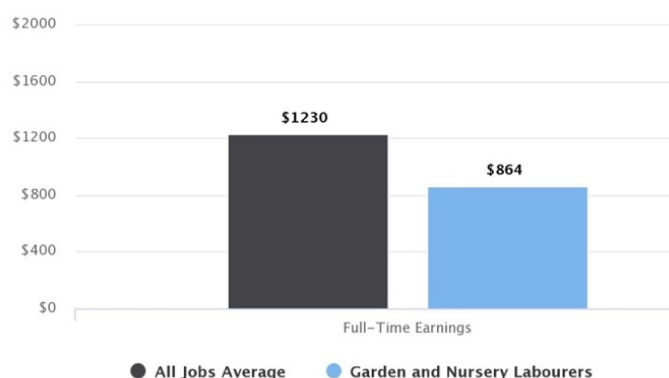


Figure 3-3: Nursery industry weekly earnings
(Source Australian Government, 2019)

⁷ <http://www.ruralcareers.net.au/nursery-and-gardens/>

⁸ Australian Government (2019) Jobs Outlook, Garden and Nursery Labourers

3.4.3 DEVELOPMENT

The limited availability, capacity and quality of education training courses as well as available, well trained teaching/training staff provide limited scope for immediate skills development by established training institutions. Of the institutes that do currently offer nursery relevant qualifications, accessibility for potential students is noted as an inhibitor. Frequently only one institute is situated in a city, for example TAFE New South Wales in Richmond is the only institution offering relevant courses for nursery businesses based in the Greater Sydney region.

A number of national programs administered through Hort Innovation, including the Green Industry Growing Leaders Program, are designed to support the development of the skilled industry workforce.

Many nursery businesses value the importance of upskilling and training; they support this for reasons beyond just the technical content of the training. The value of supporting staff through additional training is seen as an important strategy to provide acknowledgement of skills, even though training certificates are not the most important aspect employers in the industry are looking for; they value experience and personal attributes. The interaction and knowledge exchange with peers during training, conferences and/or study tours are valued by industry because they provide great networking value. Specific technical training is often delivered in-house in the belief that this protects commercial competitive advantages.

4 Nursery skilled workforce strategy

The workforce skill shortage within the Australian nursery industry requires a multifaceted systematic approach and commitment to address the issue. No ‘silver bullet’ option is available; a planned, coordinated strategy to tackle the issue from multiple perspectives is needed. An interconnected five-pillar framework has been developed for this strategy to attract, retain and develop a skilled workforce for the nursery industry, as outlined in Figure 4-1. The five-pillar strategy requires coordinated attention to all of its strategic aspects. Strategies and identified tactics comprise:

1. **Industry promotion and awareness** including active and passive promotion strategies, positive messaging and capitalising on existing industry brands;
2. **Policy parameters** to advocate and promote the value of the nursery sector for government support;
3. **Training system (formal and informal)** to support the targeted design and delivery of training programs that support the upskilling of the nursery industry at several levels;
4. **Human resource management practices** support to ensure adequate employment standards across the nursery industry; and
5. **Defined jobs and career pathways** to demonstrate dynamic career opportunities within the nursery sector to those in horticulture and other relevant sectors.

Implementation of these pillar strategies needs a foundation of a collaborative and coordinated approach across all of industry. A key initial step in the process is a greater self-appreciation of the comparative strengths of the nursery sector by the sector itself. A major source of a negative image of the nursery industry observed through the development of this strategy was the self-image many in nursery businesses portrayed.

The industry also needs to avoid conventional employment approaches used for the recruitment of unskilled labour in targeting a skilled workforce. While pathways to higher level skilled positions are possible through internal recruitment and promotion strategies, the attraction of skilled new employees to the sector is a priority that underpins the design of the strategy. Suitable, professional recruitment strategies are required.

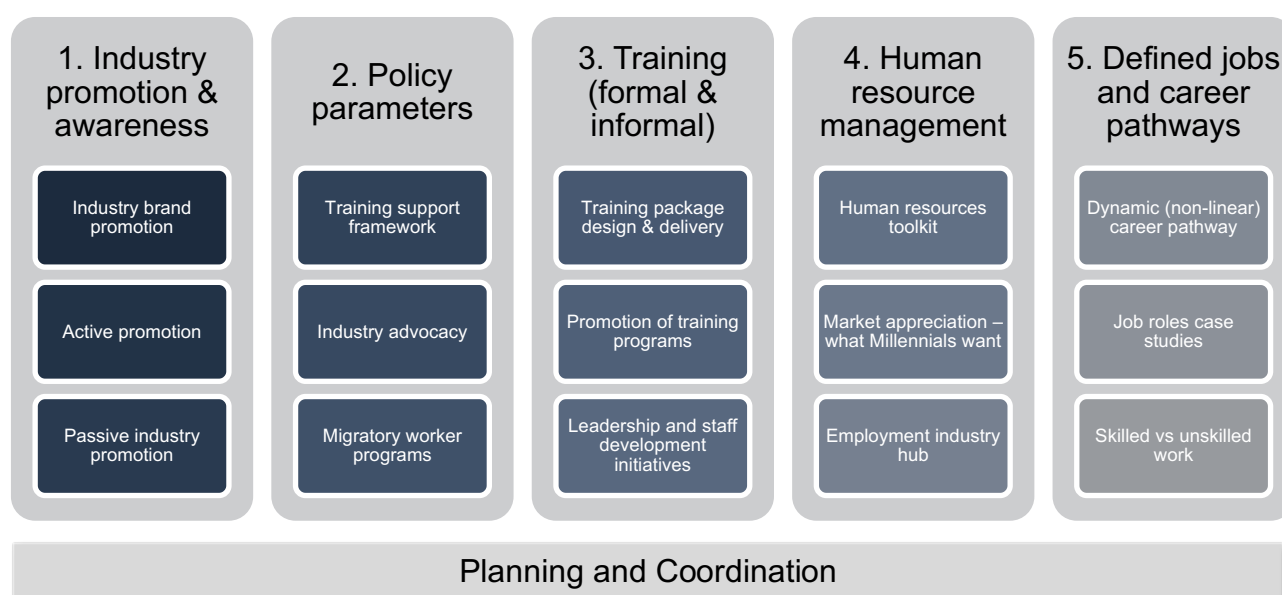


Figure 4-1: Five-pillar strategy to attract, retain and developed skilled nursery industry workforce.

5 Strategies and tactics

STRATEGY 1: INDUSTRY PROMOTION & AWARENESS	
Strategies	Tactics
Industry brand promotion	<ul style="list-style-type: none"> ▪ Capitalise on existing industry brands and initiatives for promotion of skilled career opportunities, e.g. Vision 2020 initiative, Green Cities Fund. ▪ Promote good news nursery industry stories on positive opportunities and industry future e.g. solution to environmental challenges, improved liveability. ▪ Collaboration with other agricultural industry career pathway networks and initiatives, including role of nursery sector within horticulture supply chain. ▪ Celebrate industry successes and achievements, including apprenticeship/traineeship awards. ▪ Provide suitable information about the industry on industry websites.
Active promotion	<ul style="list-style-type: none"> ▪ Showcase skilled career opportunities at high profile industry events, e.g. Melbourne International Flower and Garden Show, Local Government sustainability festivals. ▪ Skilled careers promotion toolkit for schools and career guidance councillors inclusive of career case studies, career pathway documents and greenlife resources. ▪ In-school delivery of careers promotion toolkit at targeted priority schools, including nursery business site visits, based on geographic proximity to nursery businesses and training institutions. ▪ Promote career opportunities beyond industry association websites, include skilled career opportunities on agricultural industry career pages e.g. Rural Skills Australia, MyCareer, Harvest Trail.
Passive industry promotion	<ul style="list-style-type: none"> ▪ Increase baseline awareness of nursery industry and skilled career opportunities through: <ul style="list-style-type: none"> – Social media presence, including Instagram and Twitter, e.g. modelled on Carpentry Australia #ProudChippy. – Sponsorship of targeted school programs, e.g. NGIV Victorian Schools Garden Award. ▪ Online presence of documented careers promotion toolkit information, including support resources for established agricultural skills initiatives, e.g. Rural Skills Australia.

STRATEGY 2: POLICY PARAMETERS	
Strategies	Tactics
Training support framework	<ul style="list-style-type: none"> ▪ Advocate for government incentives and support for priority subsidised training placements in nursery relevant training courses and content. ▪ Advocate for apprentice and traineeship position funding to support the development of the nursery sector.
Industry advocacy	<ul style="list-style-type: none"> ▪ Promote and advocate the nursery industry economic, social and environmental contribution to commonwealth and state governments and other relevant associations to ensure continuity of support for skills and training initiatives as a foundational issue for the sector.
Migratory worker programs	<ul style="list-style-type: none"> ▪ Facilitate support for prioritisation of primary industries in non-priority postcodes (metropolitan areas) to facilitate skilled and non-skilled migratory labour initiatives to address industry skills issue. ▪ Promote and share Australian nursery careers toolkit with targeted greenlife skilled international markets and training facilities, including. European and North America markets.

STRATEGY 3: TRAINING SYSTEM (FORMAL AND INFORMAL)	
Strategies	Tactics
Training package design and delivery	<ul style="list-style-type: none"> Engage with key training institutions, including tertiary and VET, for industry partnership collaboration on course delivery, course promotion, infrastructure availability, on-site content delivery and course content within and in addition to existing Training Packages. Inform industry skill priorities and needs for training package review through Skills Impact to ensure targeted course content to meet industry needs for the future. Support informal training initiatives through train the trainer packages for internal training and upskilling, including adult learning principles and a training resources hub on industry websites.
Promotion of training programs	<ul style="list-style-type: none"> Collaborate with training service providers, including tertiary and VET, for the promotion of training programs as linked to career pathways through skilled careers promotion toolkit. Promote formal training opportunities, including tertiary and VET, within the industry amongst nursery businesses. Support, foster and encourage apprenticeship and traineeship programs and placements.
Leadership and staff development initiatives	<ul style="list-style-type: none"> Continue support and promote participation in established leadership and development initiatives, e.g. Green Industry Growing Leaders Program, Masterclass in Horticultural Business. Facilitate regional and international study exchange and networking opportunities for peer-to-peer learning. Promote and support scholarships e.g. Nuffield, Churchill. Develop internship programs as an introduction to the nursery industry.

STRATEGY 4: HUMAN RESOURCE MANAGEMENT PRACTICES	
Strategies	Tactics
Human resources toolkit	<ul style="list-style-type: none"> Compile and document information sheets and templates for best practice human resource management to facilitate a consistent baseline of practice across the industry. The toolkit should include information relating to: <ul style="list-style-type: none"> Recruitment Induction and probation Pay rates and award classifications Performance management Dismissal and redundancy Workplace health and safety
Market appreciation	<ul style="list-style-type: none"> Industry communication activities targeted at facilitating the paradigm shift of industry image as an employer of choice. Content to include assessment of employment market trends, what millennials want and how to engage them, employment and pay conditions.
Employment industry hub	<ul style="list-style-type: none"> Host employment information and resources on a central web-based employment industry hub with targeted information for employers and employees. Share and promote employment industry information and resources with education and training providers for collaboration, e.g. Primary Industry Education Foundation Australia.

STRATEGY 5: DEFINED JOBS AND CARER PATHWAYS	
Strategies	Recommended actions
Dynamic career pathway	<ul style="list-style-type: none"> ▪ Develop dynamic, non-linear career pathways for skilled and unskilled staff positions within the nursery industry. ▪ Demonstrate entry and exit opportunities for engagement with the nursery industry across the supply chain. ▪ Share and promote dynamic career pathways through skilled careers promotion toolkit through schools, training providers and other industry stakeholders.
Job roles case studies	<ul style="list-style-type: none"> ▪ Profile and document real world examples of skilled workers across the nursery industry at different career levels and examples. ▪ Promote and share case studies through active and passive industry promotion initiatives, including skilled careers promotion toolkit.
Skilled versus unskilled work	<ul style="list-style-type: none"> ▪ Define skill levels and match relevant training opportunities and levels to career pathways. ▪ Promote skill level and qualification guides through training providers and industry promotion initiatives, including skilled careers promotion toolkit.

6 Implementation approach

A coordinated delivery effort, through multi-stakeholder engagement, will underpin the implementation of recommended tactics through this strategy. Each strategy requires the development of an agree action plan including desired outcomes (short, medium, long term) time frames, KPIs and responsibilities.

Funding for the implementation of the strategy should be secured through the nursery research and development levy as a core outcome aligned to the identified industry outcome of *better career development* (Nursery Strategic Investment Plan 2017-2021). Other external funding partners and co-operators may be identified.

The proposed implementation approach, as illustrated in Figure 6-1: Proposed implementation approach, includes a dedicated personnel resource to drive the implementation of the strategy, preferably hosted with a peak industry body, or demonstrated partnership linkages.

Oversight of the position should be provided through an industry committee comprising of growers and key industry stakeholders, to ensure the alignment and targeted delivery of activities to meet industry expectations.

Strong partnership development will be required with core delivery partners including education and training providers, service agencies and other industry stakeholders. Discrete actions may be delivered through contracted service providers with specialist skills to provide the relevant standard of product to the industry.

The initial delivery timeframe should be three years, at which point the strategy and delivery model should be reviewed and refreshed to accommodate achievements and challenges experienced, changing employment market and training conditions, and consolidate effort and energy based on progress.

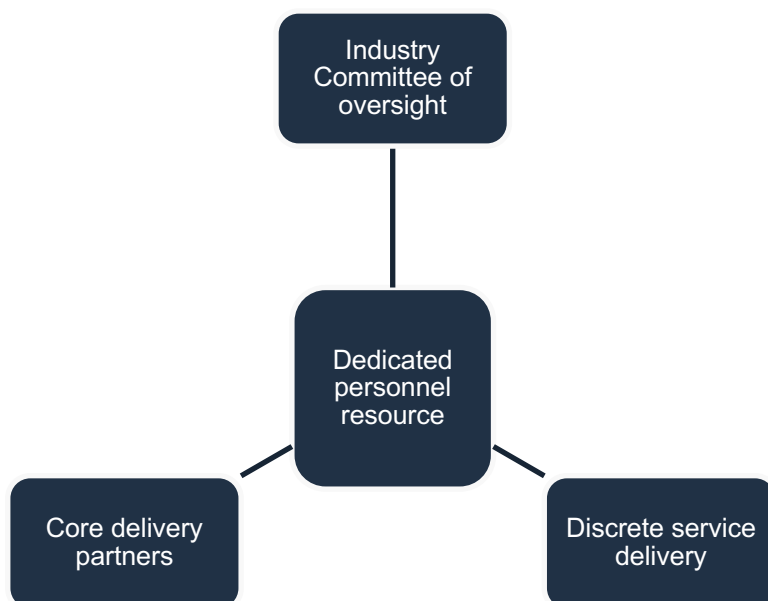


Figure 6-1: Proposed implementation approach

Appendix 1 – Process for developing the strategy

Extensive consultation across the Australian nursery industry has been undertaken in the development of this strategy, including with growers, national and state peak industry bodies, tertiary and vocational education training providers and government agency representatives.

Following a baseline desktop review, the nursery industry was consulted via several platforms including key informant interviews, an online survey and industry consultation workshop and validation through a presentation to the industry Strategic Investment Advisory Panel. The findings from the desktop review and consultation were used to confirm the extent of the challenges the industry faces in the attraction, retention and development of a workforce and informed the development of the strategy and action recommendations.

Key findings from the development of the strategy were presented to all interested stakeholders via a webinar in April 2019.

Data sources and consultation for development of strategy

Desktop review	<p>A desktop review was undertaken to identify the necessary skills for nursery production in Australia, identify the skills shortage and establish an understanding of the inhibiting factors to attract, retain and develop an appropriately skilled workforce for the current and future needs of the industry.</p> <p>The review considered the current characteristics of the Australian nursery sector, what the skill needs and shortages are, participation levels in current training offered, existing initiatives and shared lessons from other agricultural industries. The review confirmed the need for both hard (technical) and soft (people management) skills and identified the emerging challenges within the training sector due to declining enrolments resulting in limited investment in teaching staff and course offerings.</p>
Key informant interviews	<p>Key informant interviews were undertaken with a range of industry stakeholders including growers, national and state peak industry bodies, tertiary and vocational education training providers and government agency representatives. The interviews were undertaken to provide guidance on the needs and expectations of the industry in the development of the strategy, validate key findings that had emerged through the desktop review, collect additional information and test assumptions.</p> <p>A key assumption tested through the interviews was the extent to which the issue related to skilled versus manual labour. The interviews confirmed there was a universal challenge with attracting both skilled and unskilled labour, and interest to address workforce attraction in general. Actual skills required was not the main driver for recruitment strategies, rather attracting potential applicants with the right attitude for the workforce that could be “trained up”. Training options were varied and included on-the-job and study tours favoured over traditional formal courses.</p>

Online industry survey	<p>An online survey was distributed across the industry to provide an additional avenue for industry to provide comment on the study and development of the action plan. A \$200 voucher incentive was provided with the survey to encourage responses, with a total of 29 responses received.</p> <p>Responses were received from a diverse range of business sizes across the nursery supply chain, with most businesses recognizing there is a shortage of skilled labour. Emerging trends noted included the difficulty of recruiting skilled supervisory roles within businesses and a preference for good work ethic and demonstrated past experience. Current skill gaps within businesses were reported on people development skills, rather than technical production skills. A greater emphasis was focused on skills development within a business, rather than seeking external training providers. The biggest barriers seen to attracting skilled workers included remuneration and salary conditions, followed closely by limited opportunities for career growth and progression.</p>
Industry consultation workshop	<p>An industry consultation workshop was held in early December 2018 in Melbourne to coincide with Victorian trials week to ensure the availability of a number of key industry stakeholders during the busy Spring / Summer period. The objective of the workshop was to share and validate the key findings from the desktop review and stakeholder consultation and test the assumptions that emerged during the consultation to define the parameters for the attraction, retention and development of staff in the industry. A total of 14 participants contributed to the workshop discussion.</p> <p>The workshop positively confirmed the findings that had emerged and identified additional challenges of competition from other agricultural sectors and a preference for attitude over education for potential recruits. Questions related to the perception of the industry were identified and the need for the industry to be seen as highly skilled and critical to the future of horticulture production in Australia. Opportunities to strengthen communication with potential job seekers at a school level were identified, as well as the need for greater government support programs.</p>

Appendix 2 – Key stakeholders consulted

A summary of key stakeholders consulted during the key informant interviews and industry workshop is outlined as follows. Additional stakeholders' numbers consulted through other engagement activities included:

- Online industry survey – 29 responses
- Nursery Industry Strategic Investment Advisory Panel presentation – 11 participants
- Strategy findings webinar – 14 participants

Key stakeholders consulted

NAME	ORGANISATION	MECHANISM
Chris O'Conner	Nursery & Garden Industry Association	Key informant interview
Colin Groom	Domus Nursery (WA)	Key informant interview
Craig Taberner	Nursery & Garden Industry Victoria	Key informant interview
David Reid	Nursery & Garden Industry Victoria	Key informant interview & industry consultation workshop
Graeme Smith	Graeme Smith Consulting	Key informant interview
Grant Dalwood	Nursery & Garden Industry South Australia	Key informant interview
Hamish Mitchell	Speciality Trees	Key informant interview
Ian Atkinson	Nursery & Garden Industry Queensland	Key informant interview
James Davies	Chisolm Institute of TAFE	Key informant interview
Jim Johnson	Oasis Horticulture	Industry consultation workshop
Kate Vanson	Skills Impact	Key informant interview & industry consultation workshop
Leigh Siebler	Garden Centres Australia	Key informant interview
Leigh Taig	GoTAFE	Key informant interview
Mark Van der Staay	Westland Nursery (Tas)	Key informant interview
Matthew Lunn	Nursery & Garden Industry Western Australia	Key informant interview & industry consultation workshop
Matthew Mills	Garden City Plastics	Key informant interview
Mike Callaway	Swinburne University	Key informant interview & industry consultation workshop
Page Fleming	Flemings Nursery	Industry consultation workshop
Peter Knox	Alpine Nurseries (NSW)	Key informant interview
Peter Vaughan	Nursery & Garden Industry Association	Key informant interview & industry consultation workshop
Ray Lee	Nursery & Garden Industry New South Wales & ACT	Key informant interview
Robert Percy	Apsley Nursery (QLD)	Key informant interview
Sharon White	Ball Australia	Industry consultation workshop
Sonja Cameron	Cameron's Nursery (NSW)	Key informant interview
Steve Twigg	TGA Australia	Industry consultation workshop
Steven Winter	Boomaroo Nursery	Industry consultation workshop

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