



Farm Co-operatives
& Collaboration

Pilot Program

Expert Support Operations Plan

To be read in conjunction with Consultancy
Agreement

Mar 2017



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Definitions

| | |
|---------------------------------|---|
| Agreement | per Agreement |
| Allocation | Allocation of a Farmer or Farmer Group to an Approved Consultant |
| CMS/CRM | Program systems used for Case Management |
| Conflict | per Agreement |
| Consultant | Approved by SCU to provide services under the Agreement |
| Deliverables | per Agreement |
| Farmer | per Agreement |
| Farmer Group | per Agreement |
| Fees | per Agreement |
| Operations Plan | per Agreement |
| Milestones | per Agreement |
| Pilot Program | per Agreement |
| PM&DT | Program Management & Delivery team |
| Primary Producer | an individual, partnership, trust or company operating a primary production business. |
| Quote | Quotation for Expert Support (Consulting) services |
| Recommendation Report | Report provided to the PM&DT by a Consultant following Part 2 Needs Assessment |
| Services | per Agreement |
| SCU | Southern Cross University |
| Specialist | Approved by SCU to provide services under the Agreement |
| Service Delivery Streams | per Agreement |
| Needs Assessment | See Schedule 1 per Agreement |
| Standard Expert Support | See Schedule 1 per Agreement |
| Customised Expert Support | See Schedule 1 per Agreement |
| Business Support & Development | Services as indicated via Tender |
| Industry Skills | Services as indicated via Tender |
| Case Management | See Schedule 1 per Agreement |

1. Farm Co-operatives & Collaboration Pilot Program

1.1 Background

Australian farmers must be savvy and innovative business managers to remain profitable and viable. They need to reduce their vulnerability to supply chain imbalances, market price pressures and conditions set by major retailers.

Collaborative business arrangements such as collaborative farming, cooperative marketing or collective negotiations, or buying or selling cooperatives is one way of redressing that disadvantage.

To provide farmers with knowledge, skills and materials on collaborative businesses, co-operative structures, and collective strategies, the Australian Government has established the 'Farm Co-operatives and Collaboration Pilot Program' (the Program).

The objectives of the Program are to:

- Increase awareness and understanding of the availability and relative merits of a range of collaborative and innovative business approaches for farmers (including co-operatives and collective bargaining)
- Increase understanding of opportunities for realising greater returns along the supply chain
- Enhance available resources, expertise and the operating environment for collaborative and innovative business approaches suitable for farmers.

Southern Cross University (SCU) will lead the Program.

As indicated by the title, the Program is a two year pilot and the resources committed to it are for that purpose.

1.2 Program Structure

It consists of four streams, three of which can be accessed by farmers as needed:

- Knowledge Exchange
- Expert Support
- Farmer Group Projects
- Communications

Knowledge Exchange

This stream is the entry point for all Farmers looking to enter the Program. It is a combination of on-line portal, Telephone Contact and supporting tools and resources, which will allow farmers to assess their needs, outline their business development goals and identify appropriate collaborative business approaches, models and structures.

Expert Support

This stream will offer farmers access to approved independent consultants, selected through a competitive tender process. This may lead to the development of a project for consideration for additional resource allocation through Farmer Group Projects.

Farmer Group Projects

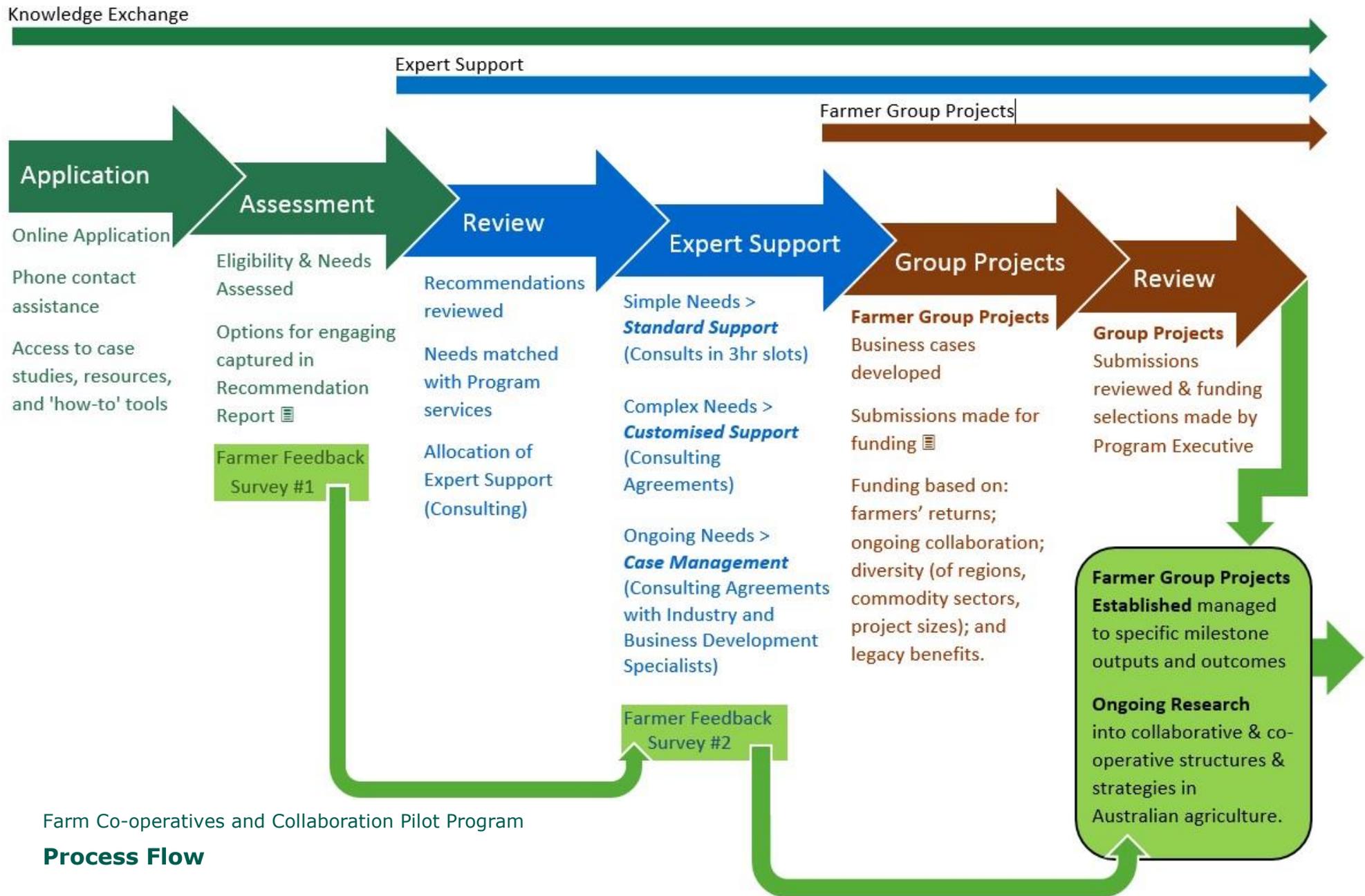
This stream provides the opportunity to move towards full implementation of a new business approach for a group of farmers. Projects will be selected for funding based on the scope and scale of on-farm impacts, the legacy of the project and development of transferrable or cross-sector knowledge outputs.

Communications

This underpins the other three Streams. It will develop and implement the communications strategy, marketing strategy, three National Forums, Program branding and information integrity including the Program website.

1.3 Process Flow

An overview of the Program's process flow can be seen in the following diagram.



Farm Co-operatives and Collaboration Pilot Program

Process Flow

1.4 Delivery Principles

The Program aims to support farmers at a grassroots level. It has been developed to provide support to improve and enable Farmer access to information and resources in a flexible, responsive and customised way.

This will be achieved through the four streams identified above, accessed by farmers as needed. It provides for farmers to nominate the level and type of support they require, as well as the capacity to access expert advice and support to work through options and opportunities. This will allow farmers and groups of farmers to 'test the waters' without committing to a pre-determined outcome. Farmers will maintain decision-making authority and autonomy. This in turn will encourage uptake, build knowledge and foster connections with existing and emerging support networks.

The principles underpinning the program are:

- Farmers will drive and maintain autonomy and authority over any decisions regarding their farm business
- Farmers will be provided with support that is responsive to their needs
- Expert support will be delivered by a Program-approved Consultant
- Expert support will be provided to farmers, or self organising groups of farmers where there is intent to consider the exploration of collaborative business approaches, including co-operative structures, collective strategies and other forms of collaboration in the agriculture sector
- Farmer Group Projects will be funded on a merit based system where extent of on-farm impact, development of legacy projects and transferrable knowledge outputs will be key considerations
- Support from existing agencies, regional networks and enabling organisations will be leveraged to drive participation, information dissemination and referrals to the Program
- Knowledge and capacity building activities are intended to be catalytic in nature and aim to generate legacy benefits to the agricultural sector and economy beyond the life of the Pilot Program and to benefit future farmers.

1.5 Farmer Eligibility

In order to have access to expert advice, a farmer must:

- Be an Australian citizen or Australian permanent resident; and
- Own, operate or manage a primary production business enterprise as determined by the Australian Tax Office.

A farmer group must include at least two people or businesses, which meet these criteria.

A primary producer is an individual, partnership, trust or company operating a primary production business. You are a primary producer if you operate a business of:

- plant or animal cultivation (or both)
- fishing or pearling (or both)
- tree farming or felling (or both).

Read more at the [ATO website](#): < click here

It is anticipated that up to 2,000 farmers will access the Program and will have wide-ranging needs in terms of the level and type of support required to identify and develop options on possible business models and/or strategies that they might wish to investigate. These would include, but are not limited to, collaborative business models, co-operative legal structures, collective strategies (marketing, investment and supply chain negotiations) and other forms of collaboration in the agriculture sector.

1.6 Applying for Program Support

Farmer entry into the Program will be through completing a Needs Assessment.

Needs Assessment consists of two parts:

- i. Part 1, a 15-20 minute online application (which can be facilitated by Program staff via the Telephone Contact Point)
- ii. Part 2, a follow-up interview (maximum duration of 1.5 hours) with a Program team member or Consultant approved to complete Needs Assessment and create a Recommendation Report. This may include suggestion for Expert Services.

2. About the Consultants

The Farming Together Program provides eligible farmers with practical guidance on how to develop and implement their collaborative business ideas through connection with experienced consultants and industry specialists. Following completion of a 'Request For Quote' (RFQ) tender process, approved Consultants may be engaged to provide Expert Support to the Program's farmers in line with the following objectives:

- To assist farmers examine the implications of collaborative approaches to their business enterprise
- To support informed decision making by farmer groups on proposed actions for investigating or adopting collaborative business approaches
- To facilitate farmer access to expert information and support on collaborative business models, structures, governance issues and innovative approaches and their implications
- To enhance the awareness, knowledge and understanding of farm advisors on collaborative business models, co-operative legal structures, collective strategies (including marketing and negotiating) and other forms of collaboration in the agriculture sector
- To leverage on-ground support agencies to build localised knowledge and support networks for groups of farmers exploring and/or adopting new business models during and beyond the life of the Program.

Support will be provided in a collaborative way with the Program's farmers to achieve skills transfer and build confidence and understanding of business practices.

2.1 Approved Consultants

The Program maintains a network of approved Expert Support Consultants that reflect:

1. A diverse range of expertise
2. A diverse geographical spread across Australia
3. A peer network to strengthen knowledge about collaborative business models, co-operative structures, collective strategies and other innovative business approaches in the agriculture sector.

All eligible farmers (those who have applied through the website or Telephone Contact Point, and undergone a Needs Assessment) will be given access to a selection of Approved Consultants with whom they wish to work.

2.2 Farmer Feedback and the Consulting Relationship

Farmers are able to give feedback on the appropriateness, timeliness and quality of the consulting services they receive. This will allow flexibility for the farmer to revisit their consultant choices and ensure their business advisory relationships are a good fit for their business.

2.2 The Legal Nature of the Consulting Relationship

Consulting services are to be provided from contract commencement until the end of financial year 2018 under a Standing Offer. The Standing Offer does not guarantee work, nor should it give rise to any expectation of work. Work will be dependent on a number of factors such as farmer choice, demand and value for money.

Consultants will be required to maintain a minimum service rating (as assessed by the Program's farmers) to ensure high quality, relevant and timely support is provided.

2.3 Consultant Categories

The Program's Expert Support Approved Consultants will provide farmers with support in a range of categories. These categories may change as the program progresses. Initial categories might include (but are not limited to):

1. Business Support and Development (mentoring, business model, structure and finance option reviews, strategy, feasibility and business plan development, market and pricing analysis)
2. Industry Specialists (supply chain analysis, food safety - processing and compliance, logistics)
3. Case Management (monitoring services provided, providing status reports and recommendations)

The following sections provide an overview of the expectations and operational steps required. Approved Consultants must be familiar with the Program's processes.

2.4 Approved Consultants list management

During the term of the Program, Consultants may be added to or removed from the Approved Consultants list, for various reasons such as:

- Poor performance
- New services offered by suppliers. This may be in response to new requirements for specialist knowledge and expertise

Additional RFQ tender rounds will occur approximately each quarter, or in line with Program need, allowing interested consulting organisations to submit their expressions of interest at any time.

2.5 Additional Consultant Requirements

All Approved Consultants are expected to provide support in a collaborative way with the Program's farmers, to achieve skills transfer and build confidence and understanding of business practices. Approved Consultants may be requested to deliver some additional services, including but not limited to:

1. Accept follow-up phone calls from the Program team for the purpose of clarifying RFQ details and service expertise [not billable].
2. Attendance and participation in National Forum/s. This activity may include participating in Co-operative training, peer-to-peer topic discussions, question and answer sessions and meet-and-greet activities with farmers and farm groups [only billable if requested to facilitate formal workshops].
3. Subject to agreement, occasional in-kind assistance may be requested for the purpose of developing training or Program promotion materials.

The Program team will be responsible for identifying opportunities and issuing invitations to Approved Consultants.

3. Service Delivery

The section provides instructions for the delivery of specific services.

3.1 Needs Analysis

Farmers or Farmer Groups will complete an online application as the first step. This application is Part 1 of a Needs Assessment and should take approximately 15 minutes.

Part 2 of the Needs Assessment is a telephone consultation with either a program Team member or Consultant. This in-depth interview aims to understand the farmers' story and helps to crystalize how the program can best support farmers' goals. Part 2 explores: where the farmer is at, what collaborative idea they want to pursue, what they might need to proceed within the Program, and how else they can be supported for their idea to be successful.

This conversation identifies issues that need to be worked through to help farmers prepare for specific support services. On average, Part 2 takes about an hour for farmers and an additional half hour for consultants to compile a Recommendation Report.

The report will recommend that a farmer or group of farmers will either:

- i. Exit the Program – deemed not ready for the Program or no further support required
- ii. Directed to the Website to access information or revisit the application (Part 1 Needs Assessment)
- iii. Progress to Standardised Expert Support within the Expert Support Stream (described later)
- iv. Progress to Customised Expert Support within the Expert Support Stream (described later).

The recommendations will be submitted to the Program Management and Delivery team who will then approve a specific suite of services or consultancy options for the farmer or farmer group:

1. Simple in nature (Standardised support); or
2. Complex (Customised support).

These are discussed in more detail in section 3.2.

Consultants who work with Farmers on the Needs Assessment activity might continue to provide further services.

It is a contract requirement that, if an Approved Consultant is asked to provide additional services to the same farmer/group, they declare prior involvement.

Operational Steps for Needs Assessment

1. The Program Management and Delivery team (PM&DT) may allocate a Farmer or Farmer Group to an Approved Consultant to complete Needs Assessment ('the Allocation'). An email will provide notification of the Allocation and request the Consultant conducts a stage 2 Needs Assessment by phone, using the online system and provide the PM&DT with a Recommendation Report.
2. If the Consultant has a potential or actual conflict of interest it must notify the PM&DT by email within 24hrs. The issue will be assessed and the PM&DT will respond to the Consultant within 24hrs. **Contact PM&DT by email.**
3. The Consultant will notify the PM&DT that they are accepting the Allocation. This will be done through the CRM system however may be an email notification during the first few months of Pilot Program
4. The Consultant will use the CRM system to access the initial online application completed by the Farmer or Farmer Group. The CRM system will provide the Consultant access to Farmer information including stage 1 and 2 Needs Assessment questions. An online report is to be completed during the telephone consultation.
5. The Consultant will make contact with the farmer/farmer group within 24 hours of the Allocation to complete the stage 2 Needs Assessment. This will be done via a telephone consultation and may take up to 90 minutes (1.5 hours) maximum. It must be completed within 5 working days of the Allocation appointment date.
6. Where a group of farmers are the applicants (newly forming or existing group) the Consultant must engage with a minimum of 2 members of a group and at least one Primary Producer and this should occur simultaneously.
7. The Consultant will work through the stage 2 Needs Assessment questions, ensuring all relevant information is captured in the reporting template. This should be done through the CRM system and the Recommendation Report completed online or by email in the event the system is down or being upgraded during the first months of Pilot Program.
8. The Consultant will provide 3 priority recommendations based on the initial application (Part 1 Needs Assessment) and outcomes of the telephone consultation, along with information provided by the Farmer or Farmer Group. The Program team will review the Recommendation Report and file notes through the CRM system.

9. The Consultant will use their CRM log-on to enable an automatic time stamp to confirm farmer interaction. This may be required to be tracked through a manual process in the initial phase of the Pilot Program. Where manual processes are in place, the Consultant must supply details of the date of service provision, length of time and farmer's full name and Program case number.

10. Consultants should lodge invoices on the last Friday of each month initially sent by email to PM&DT Admin (Deborah.Allen@scu.edu.au) for Program management approval.

Please address The **TAX INVOICE** to:

Southern Cross University

Att: Debbe Allen

Farming Together Program (FCCPP)

PO Box 157

Lismore NSW 2480

Invoices **must** include: details of actual services provided (allocated but not yet complete cannot be billed), Case Number and Farmer or Farmer Group Name), ABN, GST status, consultant's name, chargeable hours, agreed hourly rate and any approved disbursement and/or travel expenses itemised as per the Agreement. Payment of invoices will be made within 7 to 14 days from receipt.

Recommendation Report

The Recommendation Report may include one or more of the following recommendations:

1. The Farmer exit the Pilot Program for the following reasons:
 - (a) the Farmer is not ready for the Pilot Program; or
 - (b) no further support is required by the Farmer.
2. The Farmer should be directed to the Pilot Program website:
 - (a) to access the information available on the website, and/or
 - (b) to revisit the application (Needs Assessment Part 1);
3. The Farmer or Farmer Group is recommended a Standardised Expert Support service. While some farm groups will require multiple services, the Farming Together Program aims to deliver on the highest priority and most pressing needs. Consultants are asked to prioritise 3 service recommendations.
4. The Farmer or Farmer Group is recommended to Customised Expert Support services.

Both of the above levels of support could be single or multiple professional services depending on the Recommendation which is based on the needs of the Farmer or the Farmer Group. These services could comprise various elements from Business Support & Development, Industry Specialist and or Case Management.

Feedback

The Farmer or Farmer Group will undertake a feedback survey following the Needs Assessment and will comment on the Consultation, the experience in the program and whether program expectations have been met.

Consultants will be required to maintain a minimum service rating (as assessed by Program Farmer and Farmer Group participants) to ensure that relevant, high quality and timely support is provided.

If a Farmer or Farmer Group cannot be contacted and/or a Recommendation Report is not completed, the Consultant should contact the PM&DT for this to be managed directly through internal communications.

Consultant Invoices

Invoices must include: details of actual services provided (allocated but not yet complete cannot be billed), Program case number and Farmer or Farmer Group Name, ABN, GST status, chargeable hours, agreed hourly rate and any approved disbursement and/or travel expenses itemised as per the Agreement. Payment of invoices will be made within 7 to 14 days from receipt by email to:

Deborah.Allen@scu.edu.au

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3.2 Consulting Services

Business Support and Development:

1. Needs Assessment
2. Mentoring
3. Referral to other business services
4. Assistance with business planning
5. Assistance with feasibility studies
6. Assistance with strategic planning
7. Assistance with the development of collaborative business systems and process
8. Assistance with development of business proposals
9. Assistance with understanding and planning for e-commerce
10. Assistance with crowd funding and financing models
11. Assistance with group negotiation and collaboration
12. Coordination of complex and high value projects

Industry Specialist:

1. Financial management and Planning
2. Accounting
3. Legal matters
4. Business structures
5. Marketing support
6. Product development
7. Supply chain analysis
8. Pricing
9. Group negotiation
10. Interstate and international market access and expertise
11. Governance
12. Quality assurance, food safety and compliance
13. E-commerce

The Needs Assessment will be completed for all Farmers and Farmer Groups who are eligible for the Program. This results in a Recommendation Report, highlighting 3 priority Expert Support services. Depending on the recommendations, farmers may be allocated an Approved Consultant for either:

- Simple (Standardised Expert Support); or
- Complex (Customised Expert Support)

The differences between the two have an impact on the operational process that must be followed by Consultants.

3.2.1 Standardised Expert Support

Where standard support needs have been identified in the Recommendation Report, the Program will allocate an Approved Consultant to deliver a maximum of three hours of support at a time. This support may be delivered either by telephone, email, online or in person if appropriate.

Advice provided through Standardised Expert Support will relate to specific issues identified in the Needs Assessment e.g. the legal or financial implications or requirements of collaborative arrangements.

Farmers or Farmer Groups will have ultimate choice of the Consultant with whom they wish to work and will assess and feedback the quality of the support provided.

In practice, this will mean the Program team will aim to provide a list of three (3) Approved Consultants to the Farmer/Farmer Group who will then select and notify the PM&DT of their preferred Consultant. The process for this is outlined below.

The offer of support services the Farmer/Farmer Group will be valid for one month, with the support provision to have been completed within two months. The PM&DT will ensure the timing of services delivered is on track for the Farmer or Farmer Groups to move through the Program to progress their collaborative farm projects.

Once a case has been allocated Expert Support services to the value of \$10,000 (incl. GST), the Farming Together Program requires a business proposal for any additional Expert Support. Assistance in developing the Business Proposal can be part of the Expert Support assistance. This ensures the progress towards a long term vision for the project.

Operational Steps - Standardised Expert Support

1. The Program Management and Delivery team (PM&DT) will allocate a Farmer or Farmer Group to a Consultant for support services to be provided in a standard three (3) hour consultation.
2. An email will provide notification to the Farmer or Farmer Group of the Allocation for Expert Support; by selecting the option of One out of Three (1 of 3) approved Consultants; a response email will identify the selected Consultant; an email will notify the Consultant of the Allocation and request for Expert Support services. The Allocation email will detail the recommended Expert Support service; the selected Consultant; access to the Case history via the CRM system and 3 hour time consultation.
3. If the Consultant has a potential or actual conflict of interest in accepting the Allocation it must notify the PM&DT by email within 24hrs. The issue will be assessed and the PM&DT will respond to the Consultant within 24hrs.
Contact PM&DT by email.
4. The Consultant will notify the PM&DT they accept the Allocation. This should be done through the CRM system however may be an email notification during the first few months of Pilot Program.
5. The Consultant will review the relevant Farmer or Farmer Group Needs Assessments (Parts 1 and 2) available through the CRM system or by an email during the first month of Pilot Program as required.
6. The Consultant will make contact with the Farmer or Farmer Group within 2 working days of the Allocation to arrange a time to complete the agreed services. This consultation must occur no later than two months from the initial Allocation of Expert Support services (the Funding Approval Date). After this period the Farmer or Farmer Group funding approval expires subject to Program discretion.
7. The Consultant will complete the session by telephone, email, skype or in person if appropriate depending on the support services required and the Farmers' and Consultants' preferred method.
8. The Consultant will provide comprehensive file notes on the relevant Farmer or Farmer Group case to be saved in the Program CRM system or emailed to the PM&DT in the event the system is being upgraded.
9. The Consultant will provide a Recommendation in the CRM system for the Farmer or Farmer Group case. The Recommendation will address: if any additional services are required (and at what priority); if the service needs

have been met and/or if the Farmer or Farmer Group is ready to complete and leave the Program.

10. The Consultant will use their CRM log on to enable an automatic time stamp to confirm farmer interaction. This may be tracked through a manual process in the initial phase of the Pilot Program. Where manual processes are in place, Consultants provide the date and details of service provision, the length of consultation and the farmer's full name and case number.
11. Consultants should lodge invoices on the last Friday of each month initially sent by email to PM&DT Admin (Deborah.Allen@scu.edu.au) for Program management approval.

Please address The **TAX INVOICE** to:

Southern Cross University
Att: Debbe Allen
Farming Together Program (FCCPP)
PO Box 157
Lismore NSW 2480

Invoices **must** include: details of actual services provided (allocated but not yet complete cannot be billed), Case Number and Farmer or Farmer Group Name), ABN, GST status, consultant's name, chargeable hours, agreed hourly rate and any approved disbursement and/or travel expenses itemised as per the Agreement. Payment of invoices will be made within 7 to 14 days from receipt.

3.2.2 Customised Expert Support

Groups of farmers with well-developed ideas or projects who are ready to work together may be referred directly to Customised Expert Support. Depending on the scope and complexity of the support required, a case manager may be appointed to oversee implementation.

It is essential to note that the recipients of Customised Expert Support must be a group with a minimum of two Eligible Primary Producer members. Therefore a Consultant will be working with at least two (2) Farmers within the group.

A majority of members of the group must own, operate or manage a primary production business enterprise as determined by the Australian Tax Office.

Entities that are not Primary Producers (e.g. farm service providers, members of the supply chain beyond the farm gate) are eligible to participate, but the majority of

applicants for Customised Expert Support must be Primary Producers of a collaborative entity (e.g. co-operative, incorporated association or collaborative business model).

An emphasis of Expert Support will be continual rigorous assessment of the feasibility of the collaboration. Groups will be encouraged to complete or exit the Program if:

- There are significant risk factors in the collaboration model which will impede the ability of the group to succeed
- The group is making significant progress so that it is able to implement its plans independent of the program.

Both of these options would be considered positive outcomes of the Program. To allow this process to unfold, specific deliverables and timeframes will be established by the Program at which progress is assessed and reported.

Consultants allocated to provide support services to more complex cases may be required to work directly with a Case Manager appointed to the Farmer Group. Further, they may be required to provide Progress Reports with identified outcomes and Recommendations to the appointed Case Manager.

Operational Steps - Customised Expert Support

1. Program Management and Delivery team (PM&DT) will email the Consultant and request a Quote to provide Expert Support services for a case, based on hourly rates set out in the Agreement.
2. If the Consultant (or organisation) has a potential or actual conflict of interest in accepting the Allocation it must notify the PM&DT by email within 24hrs. The issue will be assessed and the PM&DT will respond to the Consultant within 24hrs. **Contact PM&DT by email.**
3. The Consultant (or organization) must declare any previous program interaction with the Farmer Group and state whether this would preclude future delivery of Expert Support services.
4. The Consultant will submit the Quote to the PM&DT within 2 working days following a request for Quote. The Quote may be emailed to the PM&DT in the initial phase of the Pilot Program. The PM&DT will provide a custom Quote template on request. **PM&DT email.**
5. The Quote will be assessed and the PM&DT will notify the Consultant within 2 working days if it accepts the Quote. The PM&DT will Allocate the Case and an email will notify the Consultant accordingly.
6. The Consultant will review the relevant Farmer Group Needs Assessments via the CRM System with access to any other file notes and notification if a Case

Manager is appointed. Case files available through the CRM or by email during the first month of Pilot Program as required.

7. The Consultant will make contact with the Farmer Group within 24 hours of accepting the Case Allocation to arrange a time to commence the Customised Expert Support services.
8. The Consultant will complete the agreed services in line with the approved milestones and timeline provided in the Quote. The consultation must occur within the specified time from initial Allocation of Expert Support services, being the Funding Approval Date. After this period the funding approval expires, subject to Program discretion.
9. The Consultant will provide comprehensive file notes on the relevant Farmer Group case to be saved in the CRM or emailed to the PM&DT in the event the system is being upgraded.
10. The Consultant will comply with all reporting requirements included in the Operations Plan and subject to the Agreement. The Consultant will raise any concerns relating to progress with the PM&DT as soon as they arise.
11. The Consultant will use their unique CRM log on to enable an automatic time stamp to confirm farmer interaction. This may be required to be tracked through a manual process in the initial phase following Program launch. For manual processes, Consultants provide the date and details of service, the length of consultation and the farmer's name and case number.
12. Invoices will be submitted in line with payment milestones agreed as part of the approved quote. In all other circumstances Consultants should lodge invoices on the last Friday of each month initially sent by email to PM&DT Admin (Deborah.Allen@scu.edu.au) for Program management approval. Please address The **TAX INVOICE** to:

Southern Cross University
Att: Debbe Allen
Farming Together Program (FCCPP)
PO Box 157
Lismore NSW 2480

Invoices **must** include: details of actual services provided (allocated but not yet complete cannot be billed), Case Number and Farmer or Farmer Group Name), ABN, GST status, consultant's name, chargeable hours, agreed hourly rate and any approved disbursement and/or travel expenses itemised as per the Agreement. Payment of invoices will be made within 7 to 14 days from receipt.

3.2.3 Case Management

Where a Case Manager is appointed to complex cases they will be responsible for managing and reporting the delivery of all services. They will be engaged via a formal engagement agreement.

The Case Manager will work collaboratively with Farmer Groups to:

- Assess opportunities and needs
- Develop a plan of action, including specific services and support to be provided
- Co-ordinate and facilitate provision of services and support
- Monitor and review progress
- Report on progress to Expert Support & Farmer Group Project Team

Operational Steps for Case Management Consultants

1. Program Management and Delivery team (PM&DT) will email a request for quote to the Consultant. This will include a detailed outline of the required services.
2. If the Organisation or Case Manager has a potential or actual conflict of interest in accepting the Allocation it must notify the PM&DT by email within 24hrs. The issue will be assessed and the PM&DT will respond to the Consultant within 24hrs. **Contact PM&DT by email**
3. Organisation/Case Manager must declare if they have had any previous Program interaction with the Farmer Group.
4. The Case Manager to submit the quote via email to the PM&DT within 2 working days of the request. The PM&DT will provide a custom Quote template on request.
5. The Quote will be assessed and the PM&DT will notify the Case Manager within 2 working days if it accepts the Quote. The PM&DT will Allocate the Case and an email will notify the Case Manager accordingly.
6. The Case Manager will review the relevant Farmer Group Case File with access to any other file notes and notification if a Case Manager is appointed. Case files may be via email during the initial Pilot Program as required.

7. The Case Manager will ensure all Expert Support services commence in accordance with the formal Case Management Quote and as per the Agreement.
8. The Case Manager will provide comprehensive file notes on the relevant Farmer Group case to be emailed to the PM&DT.
9. The Consultant will raise any concerns relating to the service with the PM&DT as soon as they arise. This may include concerns regarding farmer commitment, quality or speed of Consultant advice, changes in milestones or failure to meet milestones. This feedback will be provided through a combination of file notes, discussions with the relevant PM&DT member and formal reports.
10. The Consultant will comply with all reporting requirements in the Operations Plan and subject to the Agreement. The Consultant will raise any concerns relating to the service progression with the PM&DT as soon as they arise.
11. The Case Manager will record dates and time spent on farmer interaction. This may be required to be tracked through a manual process in the initial Pilot Program. Where manual processes are in place, the details pertaining to the date of service provision, the length of time with the Farmer Group name and case number.
12. Invoices will be submitted in line with payment milestones agreed as part of the approved quote. In all other circumstances Consultants should lodge invoices on the last Friday of each month initially sent by email to PM&DT Admin (Deborah.Allen@scu.edu.au) for Program management approval. Please address The **TAX INVOICE** to:
Southern Cross University
Att: Debbe Allen
Farming Together Program (FCCPP)
PO Box 157
Lismore NSW 2480
Invoices **must** include: details of actual services provided (allocated but not yet complete cannot be billed), Case Number and Farmer or Farmer Group Name), ABN, GST status, consultant's name, chargeable hours, agreed hourly rate and any approved disbursement and/or travel expenses itemised as per the Agreement. Payment of invoices will be made within 7 to 14 days from receipt.

3.3 Farmer Group Project Funding

The Farm Co-operative and Collaboration Pilot Program includes opportunities for farmers or farm groups to move towards full implementation of their collaborative and innovative business projects. There will be two rounds of funding offered during the Program, totaling approximately \$2,600,000 (this is in addition to the numerous Expert Support consulting opportunities given to groups). The aim of this element of the Program is to enable farmers to apply collaborative business models, co-operative structures and collective strategies (such as bargaining, marketing, etc.) to achieve a fairer farm gate return for their products.

3.4 Project Funding - Timing

Two rounds of funds will be offered, in February and June of 2017. Funded projects must be completed by 30 April 2018.

Projects will be funded for a maximum of 12 months using a co-investment model. Applicants will be required to contribute a minimum of 10% of the total cash budget of the project. In addition, projects which include a significant in-kind contribution (such as the Project farmers taking key roles), will be considered favourably.

Farmer Group Project business case proposals will be selected for funding through a competitive merit-based process. Proposals will be evaluated against program priorities, eligibility criteria and assessment criteria. Priorities for the mix of projects funded include projects which:

- cross-geographical and/or jurisdictional boundaries
- reflect a range of industry sectors
- reflect different levels of sophistication and development
- demonstrate a range of approaches in terms of scope and scale of participation and outcomes.

3.4 Eligibility for Project Funding

Applicant groups must include a majority of members (at least 2), who are primary producers; as defined by the Australian Tax Office. Applicants must have already engaged with two levels of the Farming Together Program. Funding



submissions will ONLY be accepted by Farmer Groups who have completed the Program's Needs Assessment and some level of Expert Support.

Further details of objectives and application processes can be found in the Program's Farmer Group Projects Funding Guidelines. Enquiries can be directed to the Program's Farmer Groups team leader, Amanda Scott via email: info@farmingtogether.com.au

Farming Together Program

4. Program Management & Delivery Team Contacts

Program Director

Lorraine Gordon lorraine.gordon@scu.edu.au 02 6620 3994

Communications

Susan Webster susan.webster@scu.edu.au 02 6620 3113
M: 0437135581

Knowledge Engagement

TBA

Needs Assessment

Part 1. Apply online at: Phone assistance:
<https://farmingtogether.com.au/self-assessment> **1800 00 55 55**
8.30-5pm EST

Part 2. Needs Assessment interview - consultation

Expert Support

Andrew Jamieson andrew.jamieson@scu.edu.au 02 6620 3059
M: 0437 716 141
Cathy Byrne cathy.byrne@scu.edu.au 02 6626 9505

Farmer Group Projects

Amanda Scott amanda.scott@scu.edu.au 02 6620 3020
M: 0404 887163

Administration

Deborah Allen deborah.allen@scu.edu.au 02 6620 3489
Debbe Allen

Website: farmingtogether.com.au

5. Frequently Asked Questions (for Consultants)

How do I know what I am approved to deliver?

Your Standing Offer issued from SCU will include a list of services you are approved to provide.

Our circumstances have changed since we signed our Standing Offer. What do we need to do?

You must notify SCU if you change any of the following:

- Personnel in your organisation approved to deliver services
- What services each person is approved for
- What rate you are allowed to charge for these services

To do this, you will need to provide a written request to the Program Director. The Program Director can approve or decline any extension of services, including the addition of new personnel and the rate proposed, expansion of services and regions. If approved you will receive an addendum to your standing offer confirming the new details

Will we receive training?

Initial training will be provided as required. Specific training workshops may be offered at Forums or at other times as the Program progresses.

How does the rating system work?

Consultants' performance will be assessed by farmers and groups of farmers who access services, Consultants will be required to achieve a minimum service rating to remain in the network.

How often will new Consultants be added?

Tenders will be opened on a quarterly basis through the life of the program, or as required, so that additional skills/people/geographical reach can be bought on to meet Program demand.



During the term of the contract there may be deletions from and additions to the Approved Consultants list for various reasons such as:

- Poor performance of a Consultant
- New services offered by suppliers. This may be in response to new requirements for specialist knowledge and expertise

Where case management is required in a location without an approved Consultant, invitations will be extended to appropriate organisations to allow direct engagement for a specific farmer group. This will require a request for quote (RFQ) and subsequent contract of engagement.

This Operations Plan should be read in conjunction with the Consultancy Agreement. The Operations Plan may be subject to change will be provided to Consultants as required.