Southern Central Sub-region (SCS)

Regional Workforce Planning

FINAL REPORT

—

August 2017

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16 August 2017

The Mayors and General Managers
SCS Region of Councils
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Dear James

Regional workforce planning

Thank you for the opportunity to provide this report into the regional workforce planning and development for the SCS Region of Councils comprising Brighton, Derwent Valley, Central Highlands and Southern Midlands. The study has been broadly undertaken having regard to the Standing Committee on Tertiary Education, Skills and Employment (SCOTESE) Guidelines, with some departure from these as determined by the Steering Committee. This challenging and broad reaching project has involved:

— Understanding the region's economic and social profile (Section 1)

— Understanding the current workforce capability and capacity of the region and the key educational offerings available in the region (Section 2-3)

— Projecting the future workforce capability and capacity requirements of the region, having regard to the many existing industry workforce development plans already in place (Section 4)

— Identifying common and industry specific strategies to address emerging gaps between the current and future capacity and capability workforce needs for the region (Section 5)

The study has found:

— The region currently supports approximately 8,000 jobs and has experienced some comparative disadvantage but signs of growth and transformation are emerging in some key industries such as tourism, agriculture and human services

— Growth in demand for good and services from such industries, coupled with a remote, relatively disadvantaged and an ageing workforce is creating many skills gaps and workforce issues for industries now and into the foreseeable future that broadly relate to attracting, developing and retaining labour.

— Official labour force projections point to demand for an additional 800-900 jobs in the region by 2020, though this forecast can be impacted by a wide range of forces that can "push or pull" against these forecasts. Beyond that, more workers will invariably be needed in needed in those growing industries all else being equal

— This suggests a range of common as well as industry specific strategies should be pursued that provide a broad direction, but also allow some agility to deal with uncertainty

— Regional governance, leadership and collaboration with a wide range of stakeholders from industry, education and employment support sectors will be needed to advance implementation

We thank you for the opportunity to have undertaken this study and would be pleased to provide ongoing support as required.

David Richardson
Director

SERDA and SCS Workforce Planning Study

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Important notice

Inherent Limitations

This report has been prepared as outlined in the Scope Section on page 9. The services provided in connection with this engagement comprise an advisory engagement which is not subject to assurance and other standards issued by the Australian Auditing and Assurance Standards Board, and consequently no opinions or conclusions intended to convey assurance have been expressed.

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by, WorkCover's management and personnel / stakeholders consulted as part of the process.

KPMG have indicated within this report the sources of the information provided. We have not sought to independently verify those sources unless otherwise noted within the report.

KPMG is under no obligation in any circumstance to update this report, in either oral or written form, for events occurring after the report has been issued in final form.

The findings in this report have been formed on the above basis.

Third Party Reliance

This report is solely for the purpose set out in the "Scope" section of this report and for SERDA's and SCS's information, and is not to be used for any other purpose or distributed to any other party without KPMG's prior written consent.

This report has been prepared at the request of SERDA and SCS in accordance with the terms of the contracts with Sorell Council and Brighton Council. Other than our responsibility to SERDA and SCS, neither KPMG nor any member or employee of KPMG undertakes responsibility arising in any way from reliance placed by a third party on this report. Any reliance placed is that party's sole responsibility.

Glossary of terms

CoE	Centre of Excellence
DHHS	Department of Health and Human Services
DoE	Department of Education
EN	Enrolled nurse
EPA	Environmental Protection Agency
GSP	Gross State Product
HR	Human resources
JA	Job Active
MHPS	Midlands Multi-purpose Health Centre
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme
NFP	Not for profit
POMS	Pacific Oyster Mortality Syndrome
RDA	Regional Development Australia
RHH	Royal Hobart Hospital
RN	Registered nurse
RTO	Registered Training Organisation
SCOTESE	Standing Committee on Tertiary Education, Skills and Employment
SCS	Southern Central Sub-region
SERDA	South East Regional Development Authority
TCBITB	Tasmanian Building and Construction Industry Training Board
TCE	Tasmania Certificate of Education
TSIC	Tasmanian Seafood Industry Council
TTC	Trade Training Centre
UTAS	University of Tasmania
VET	Vocational Education and Training

The Headlines

Headlines

Summary observations	
Current economic and social profile (Section 1)	**The headline indicators of the SCS region show:** — A predominantly rural demographic, with some urban features in Brighton — A region with comparatively lower average incomes, a higher working median age and higher dependence on government support — Combined Gross Regional Product (value of production/output) amounting to $913M p.a. — 7,973 total jobs in the region of which 75% reside in Brighton and Derwent Valley — Unemployment that is above the State average (other than Southern Midlands) suggesting there is some under-utilised labour — Comparatively high levels of economic and social disadvantage and lower levels of educational attainment in some of the local government areas — Growth in many of Tasmania's key strategic industries – accommodation, transport, construction and social assistance, but some contraction in agriculture, forestry and fishing
Education and job support (Section 2)	**The region has a diverse range of education and Job Active providers that point to:** 1. Some issues around access to childcare for parents seeking employment 2. Design of training programs that balance skills with qualifications 3. Need for education to be more targeted to the need of industry for students at an earlier age 4. Career advisory support to students in secondary may not yet be adequately filled by “MyEducation” and other supports 5. Some courses not being run in the regions due to the costs of delivering training to smaller classes 6. Some perception that TasTAFE has scope to improve its service delivery and reputation 7. A perception that industry sectors receive skill development funding in a fairly ad hoc manner 8. JAs tend to provide job support services for longer term unemployed in regions who may come from disadvantaged backgrounds and do not have adequate employability skills 9. The funding model that drives the JAs appears to not suit the needs of industry and incentives offered to take on employees are not attractive to industry

Headlines

Summary observations	
Current state (Section 3)	**The analysis of current state workforce capability and capacity in the region has found:** — There are a number of 'officially reported' state wide and regional specific skills shortages already impacting the target growth industries in the region including chefs, bricklayers and plasterers, registered nurses, truck drivers, mechanics and engineers — There are many other labour supply and skills shortages being experienced by several of the growth industries including middle management roles in agriculture and lower level roles in transport and logistics and the agricultural industry — These current capability and capacity shortages are being driven by a range of factors affecting all of the target industries to varying degrees such as workforce ageing, growing demand for goods and services, low basic employability skills, competition from other industries for scarce labour, seasonality of work available, the remoteness of the regions, access to public transport and accommodation and some industries not being perceived as offering a career
Future state (Section 4)	**The analysis of future state workforce capability and capacity in the region has found:** — Official forecasts predict the need for a further 815 jobs in the region by 2020, of which 583 (72%) are required in several of the strategic growth industries covered by this study — Many of the current workforce issues now being experienced will continue in some of the industries for the foreseeable future due to a range of drivers that are an extension of the workforce capability and capacity issues currently being experienced. In response to the current and looming future workforce capability and capacity challenges, many of the industries have developed sector workforce development plans. Some industries have made good progress in the development and implementation of these plans to address the foreseeable risks, while some others are still gathering momentum — There are also many other interventions and programs delivered in schools (e.g. Beacon Foundation) and within industries (often funded by Skills Tasmania) to address the current state issues and better prepare the industries for the future state. Many are sector focussed, increase competition for labour between industries, and have not been constructed with a specific mind to rural and remote regions
Strategies to address gaps (Section 5)	**The identification of strategies to address emerging gaps in workforce capability and capacity point to three central themes for the regions:** 1. A greater alignment between the labour needs of industries and the education system from primary through to tertiary, with emphasis given to co-design of pathways that combine education with on-the-job training to achieve TCE and Certificate qualification 2. Ongoing investment in the profile and infrastructure of Trade Training Centres to be the regional hub for design and delivery of training in the regions, with particular support from TasTAFE as the state's largest VET provider, augmented by other niche RTOs as required 3. Greater collaboration between regional councils, education providers, Job Actives and industry leaders operating in a region to collectively and innovatively address shared regional workforce issues such as seasonal employment, accommodation shortages etc. The feasibility of an employment services model, matching job seekers with vacancies, along the lines of Huon Valley Works, to be replicated in the SCS region should be investigated

1. Introduction

Objective, outputs and outcomes

Background

The South East Regional Development Association (SERDA) group of councils (Sorell, Glamorgan Spring Bay, Tasman and Clarence) and the Southern Central Sub-region (SCS) group of councils (Brighton, Derwent Valley, Central Highlands and Southern Midlands) have secured funding from Skills Tasmania to undertake regional workforce planning.

Objective

The specific objective of this study is to focus on step 1 - workforce planning ("the what") – i.e. the identification of current and forecast workforce capability and capacity required to meet future needs. Gaps that emerge will then lead to the identification of strategies and actions to later inform step 2 - workforce development planning ("the how").

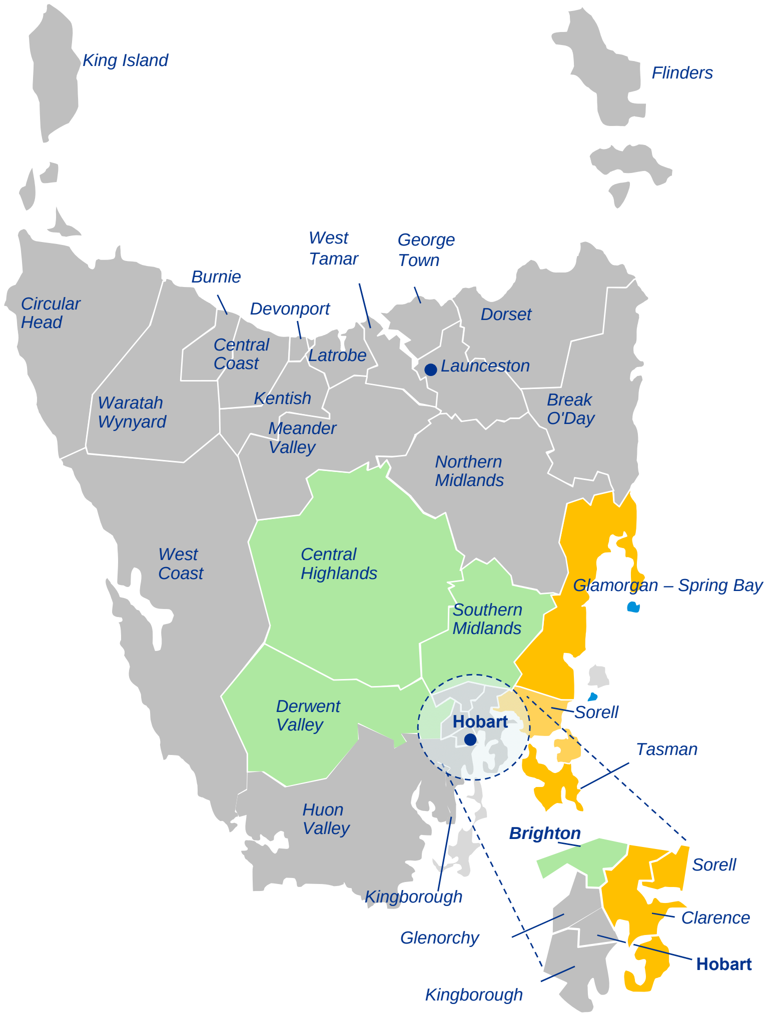
The Steering Committee is also interested in learning about implementation initiatives that can address immediate labour supply and skills issues facing the regions

Outputs and outcomes

The intended output is a Workforce Development Plan. This report will contribute to a number of the intended program outcomes in the long run, but in the more immediate term, the study will specifically target the following objectives:

- Better linkage of regional workforce planning to regional economic development; and
- Improved collaboration and dialogue between industries and regional bodies.

The study will also be an important first step in advancing a number of the other program objectives.



Sustainable social and economic development

Sustainable social and economic development

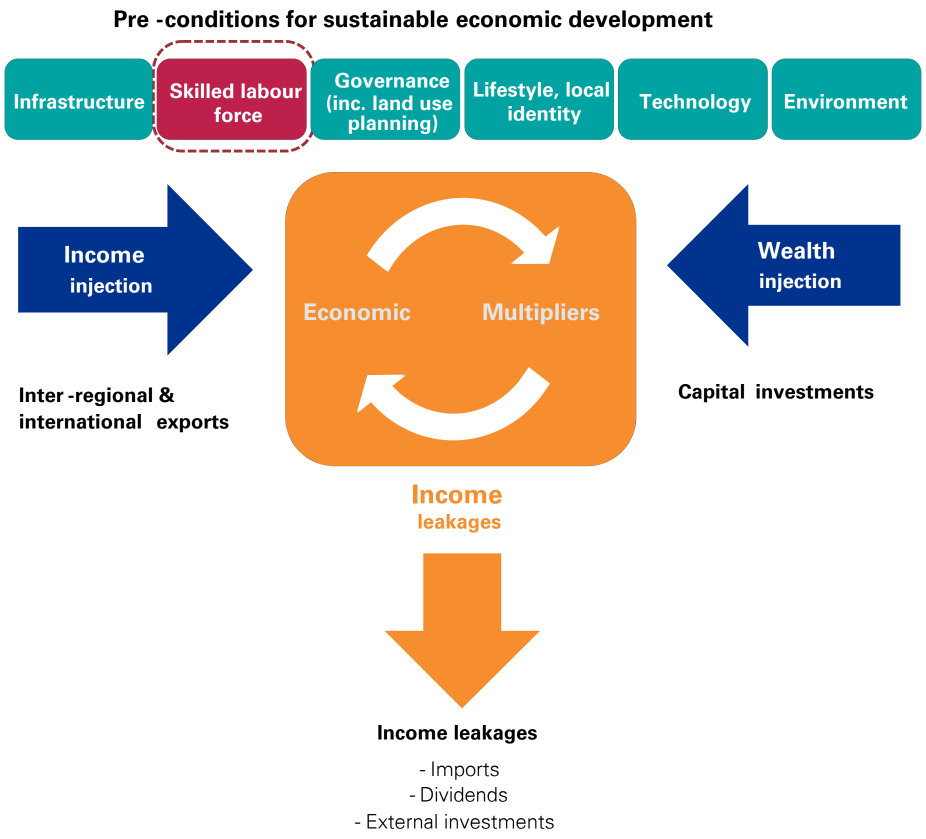
Our overarching approach to sustainable social and economic development is represented by the simplified model of a local economy, (shown on the right).

The boxes along the top of the model represent preconditions or ‘enablers’ for development. The key to maximising development opportunities include:

- strengthening and leveraging existing industries to maximise export opportunities;
- attracting new investments and export industries; and
- strengthening local industry supply chains to minimise income leakages thorough imports (i.e. Import replacement).

This project for SERDA and SCS is focussing on the skilled labour force enabler.

The Steering Committee also sees there are strong broader social and community benefits to be gained by developing a more fully employed and engaged workforce, which can maximise spending and investment in the region.



Regional workforce planning and development

Key definitions

Regional workforce planning and development is the suite of planning and implementation activities that can increase workforce participation and maximise the availability of appropriately skilled workers required to meet the local industry's current and forecast workforce needs. This encompassed three processes as set out below

Step 1: Regional workforce planning

- What is the region's current workforce capability and capacity?
- What workforce capability and capacity is required to meet the future needs of the region?

The focus of this study is on Step 1…

Step 2: Regional workforce development planning

- What workforce development activities are needed to address the workforce capability and capacity gap?

…but we want to also capture ideas in relation to Step 2…

Step 3: Regional workforce development implementation

- Implement training, career advice and other initiatives that aim to better meet workforce development needs by:
  - Increasing attraction and retention of skilled labour
  - Increasing the participation of local people who are disadvantaged in the labour market
  - Increasing the qualifications and skills utilisation of existing workers

…so that the Steering Committee's passion and enthusiasm can drive some 'quick wins' to address the more immediate work force issues facing the region

Workforce planning in a dynamic environment

This regional workforce planning study is being undertaken in an environment in which there are a wide range of forces that can push for or pull against the need for additional regional workforce capability and capacity. Workforce planning and development in this context is not a precise science, but rather a process that can provide direction

Regional forces
- Stronger Regions funding to stimulate the regions
- Local government reforms – amalgamation and resource sharing
- Tree and sea changers and pressure on commuter infrastructure
- UTAS led investment in Hobart CBD and the regions

Business forces
- Reid Fruits Jerico expansion in cooler climate cherries
- Hobart Airport upgrade to increase passenger and cargo related
- Tourism developments in the SCS region including Pump House Point, Curringa Farm
- Moo Brew growth and expansion in Brighton
- Whisky and Gin Distillery expansions – Shene, Redlands, Belgrove and Nant

Industry forces
- Tourism 21 growth goals and 1,300 new beds in Hobart in next 3 years
- Vibrant building and construction sector
- Upgrades to the Heritage (Midlands) Highway to improve transport
- Irrigation rollout to south east and central highlands as part of food bowl strategy
- Various industry-led workforce development plans that focus on an industry rather than a region

Education and training forces
- VET sector loan reforms and Gonski
- UTAS moving into Associate Degrees
- Review of Year 9-12 curriculum
- Change school starting age to 3 ½
- TasTAFE Education Architecture Project
- Federal led review of regional education
- Year 12 reforms to improve education and employment outcomes

Social forces
- Ageing populations
- NDIS rollout
- Closing the gap goals still a challenge
- Immigration constraints
- Obesity, substance abuse and mental health challenges
- Childcare funding reforms

Environmental forces
- Warming climate attracting wine growers
- EPA setting aquaculture standards and limits
- Water and sewerage capital works to make regions more liveable
- Energy security and shift to renewables

Technological forces
- Labour replacement - Jobs of the future
- Advanced technologies
- Driverless buses, truck and cars
- Health based technologies to prolong life and ageing for longer
- Rise of social media...where to next?

Legal forces
- Work health and safety requirements
- Red Tape reduction in planning and building

Political / Economic forces
- Strengthening global economy
- Trump policy impacts
- China's rise
- Federal 'hung' parliament
- Tight Federal budget
- Strengthening Tasmanian economy and budget
- Unemployment drops to 5.9% in Tasmania
- Shift to more part-time and casual jobs
- Tax cuts to businesses < $50M turnover

2020 and beyond - the future of work will be different to today

Beyond 2030, 40% of the jobs don't yet exist, but there are signs where they are heading…

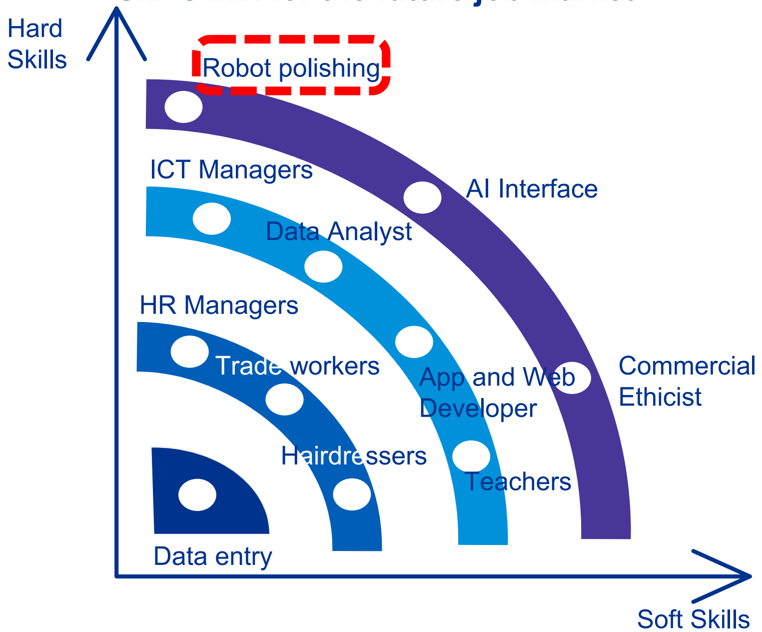
From 1991 to 2015[3]
- Lower skilled occupations like labourers and administration support decreased by 37% and 35% respectively
- Technology change reduced demand for typists and bank tellers, film processors etc.

From 1991 to 2015[3]
- Increase in personal assistants and computer programmers
- Community and professional services jobs up by 87%
- The number of professionals increased by 54%

From 2017 – 2030 it is projected[2]:

- **Connectivity and a rising population will shape 3 million new jobs**
  - **55% rise in women workers**
  - **39% rise in part time work**
  - **195% rise in workers over 65**
- **Workers will need to be both digitally and soft skilled in order to succeed**
- **Workers will have more flexibility, move from task to task, job to job, and place to place more than any previous generations**
- **Workers will need skills such as creativity, entrepreneurial, and communication**
- **Internet will allow innovation and entrepreneurism outside of the capital cities**

Skills mix for the future job market[1]



High demand jobs in 2030[2]

The Technocrats: Knowledge workers, highly skilled, trained, and remunerated. (Electrical engineers and medical researchers)

The Specialist Professions: Knowledge workers that maintain systems and deliver outcomes (Accountants, dentists, teachers)

The Doers: Skilled jobs for those who 'do' (Plumbers, electricians)

The Creatives: Workers driven by what pleases, not what delivers the best return (Photographers, stylists, social media)

The Care Givers: Workers who provide care and support. (Social workers, beauty therapists, nannies, fitness instructors)

[1]*Regional Australia Institute: The future of work: Setting up kids for success, November 2016*
[2]*Super Connected Jobs: Understanding Australia's workforce by Bernard Salt (KPMG) and nbn Co*
[3]*The new work order, Foundation for Young Australians, 2015*

Industry focus areas

The study has focussed on industry sectors that are prominent in the region and have been identified by the Tasmanian State Government as strategic growth industries. In most cases, these industries already have their own sector workforce development plans or such plans are under development or revision

This study has looked at each of those sector plans to understand the industry environment, current and future forces and trends and the work force planning and development initiatives that are already in place. These have informed the analysing and reporting and guided consultations with key industry and education stakeholders.

The study has not considered ‘support’ industries, such as retail trade, public administration and safety, education and training, though there is likely to be employment change in these sectors in line with more general economic growth and population change in the regions.

Key growth industries
Aged care
Disability support
Building and construction
Transport and Warehousing
Tourism and hospitality

Sector Workforce Plans

Key growth primary industries
Dairy
Fruit
Wine
Salmon
Seafood*

** Only relevant to the SERDA study, but shown here for completeness*

Approach and report structure

This project has been informed by extensive consultation and quantitative data analysis across each of the priority industries to understand the nature of the opportunities and challenges facing the region. The methodology outlined below has directly informed how the report has been structured.

Current state

Stage 1: What is the economic and social profile of the regions and how has this changed?

Stage 1 was undertaken using desktop research with additional consultation as required in order to understand the broader demographic and economic structure of the regions

- Regional contribution to GSP
- Employment
- Occupations
- Government payments
- Industry size and growth/ decline trends

Stage 2: What is the region's current workforce capability and capacity?

Stage 2 was undertaken by analysis of existing sector workforce plans and other research, supported by consultation with industry representatives to identify

- Industry trends
- Known workforce issues
- Existing strategies actions with a particular regional focus
- Education offerings per industry

Findings of these stages are in Section 1-3

Future State

Stage 3: What workforce capability and capacity is required to meet the future needs of the region?

A three step approach was taken to further research, analysis and consultation for specific stakeholders, and comprised of:

1. Development of structured questions for discussion with each of the key stakeholder groups and approval of the questions by the Steering Committee
2. 30 face-to-face/phone consultations with key stakeholders from:
   - Industry peak bodies
   - Major employers in the regions
   - Education, training and employment sector providers
   - Other stakeholders – State and Local Government etc.
3. Analysis of official labour force projections for the period through to 2020 at a whole of state level and application of statistical techniques to develop projections for the region

This research and consultation process generated key insights into the possible futures for each industry to inform further consultation and reporting in Stage 4.

Findings of this stage are in Section 4

Gaps and strategies

Stage 4: What workforce development activities are needed to address the workforce capability and capacity gap?

Combining the data, information and findings collected during preceding phases, KPMG undertook the following key steps

1. Workshop with a representative sample of key stakeholders to:
   - Present the key findings outlined in the Discussion Paper
   - Validate/ challenge those emerging findings
   - Identify systemic issues and potential strategies/ actions to address workforce capability and capacity issues in the regions
   - Identify more specific issues and 'quick-win' actions to address any more immediate workforce capability and capacity issues in the regions
2. Compile the analysis and consultations outcomes into a Draft Report for consideration by the Steering Committee
3. Consider any feedback offered by the Steering Committee and finalise the report

Findings of this stage are in Section 5 and Appendix 5 (Regional Workshop Outputs)

Executive Summary

1. What is the SCS economic and social profile and how has this changed?

The table below and Section 1 of the report presents a range of indicators that outline the current economic and social profile of the region and the growth/ decline and relative importance of industries to the regions

The headline indicators of the SCS region show:

- A largely rural demographic, with some greater density in Brighton and Derwent Valley
- A region with comparatively lower average incomes, a higher working median age and higher dependence on government support
- Combined Gross Regional Product (value of production/ output) amounting to $913M p.a.
- 7,973 total jobs in the region of which 43% reside in Brighton
- Unemployment that remains above the State average, across much of the region, suggesting surplus capacity is available
- Comparatively high levels of economic and social disadvantage and lower levels of educational attainment, suggesting lower skills and capability
- Growth in many of Tasmania's key strategic industries – accommodation, transport, construction and social assistance, but some contraction in agriculture, forestry and fishing

Community Profile				
Demographics	**Brighton**	**Central Highlands**	**Derwent Valley**	**Southern Midlands**
Population	16,010	2,309	10,026	6,278
Area (sqkm)	171	7,982	4,108	2,615
Density (per sqkm)	93.5	0.3	2.4	2.4
Median Age	37	47	42	42
Income Statistics				
Average Income	$44,986	$36,807	$44,335	$42,128
Working Median Age	41	47	44	46
Government Support	32%	33%	35%	29%
Economic Profile				
Gross Regional Product	$326 million	$107 million	$326 million	$154 million
Local Jobs	3,464	695	2,523	1,291
Labour Force (Sept 2016)	7,144	1,064	4,551	3,072
Unemployment Rate (Sept 2016)	10.4%	6.3%	8.2%	3.6%
Socio-economic Index for Areas				
Advantage / Disadvantage Index Rank (TAS/AUS)	1 / 39	6 / 61	4 / 50	13 / 106
Education and Occupation Index Rank (TAS/AUS)	1 / 11	14 / 83	3 / 16	11 /55
Post School Qualifications	43.4%	44.1%	43.0%	42.6%

2. What is the region's current workforce capability and capacity?

The study has found there to be a number of issues impacting on the current workforce capability and capacity of the regions. Those that are more common to all industries in the region are summarised in the table below, highlighting those industries most impacted by the issues

Common current workforce issues	Tourism and hospitality	Building and construction	Aged care, disability	Transport and logistics	Dairy	Fruit	Wine	Salmon
High demand for industry outputs/ services								
Ageing workforce								
Low employability skills								
Industry attractiveness as career								
Attractiveness for more highly skilled labour								
Seasonality of demand for labour								
Uncoordinated approach by industry								
Training/ development pathways/ programs								
High reliance on part-time & casual labour								
High reliance on locally-based workers								
Difficulty attracting labour to regions								
Competition from other industries for labour								
Singular gender focus of workers	Female	Male	Female					Male
Access to worker accommodation								
Official skill shortages (Australian Government Department of Employment, Tasmania, 2016). Refer to Appendix 6	Chefs	Bricklayers Plasterers	Registered nurses	Drivers, mechanics, engineers				

2. What is the region's current workforce capability and capacity?

Capability and Capacity

The graph and table to the right presents the current workforce capability and capacity.

The September 2016 statistics were calculated by proportioning the number of persons employed in the labour force by the percentage of employment in each industry (based on the percentages provided from the 2011 census).

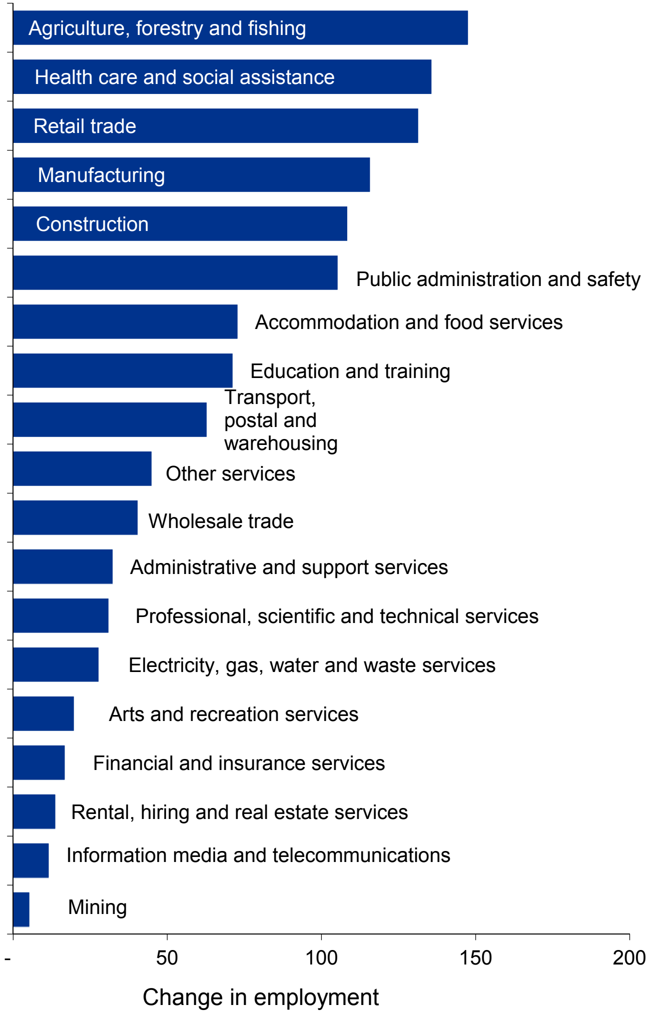
The graph presents the change in persons employed in each industry. The graph indicates that SCS has experienced growth from the 2011 census to September 2016 in all industries. The top five industries are:

- Agriculture, forestry and fishing (148 people),
- Heath care and social assistance (136 people)
- Retail trade (131 people))
- Manufacturing (116 people)
- Construction (108 people)

Current Workforce Capacity

Industries	Census 2011	September 2016
Agriculture, forestry and fishing	1,031	1,179
Health care and social assistance	1,558	1,694
Retail trade	1,577	1,709
Manufacturing	1,304	1,420
Construction	1,226	1,334
Public administration and safety	1,161	1,266
Accommodation and food services	798	871
Education and training	772	843
Transport, postal and warehousing	684	747
Other services	531	576
Wholesale trade	451	492
Administrative and support services	393	426
Professional, scientific and technical services	345	376
Electricity, gas, water and waste services	310	337
Arts and recreation services	214	234
Financial and insurance services	203	219
Rental, hiring and real estate services	170	184
Information media and telecommunications	145	157
Mining	56	61
Total	12,930	14,126

Change in Industry Employment



3. What is the region's required workforce capability and capacity?

The table below contains the Department of Employment's employment projects from November 2015 to November 2020. The table highlights the industries that will be analysed in further detail within this report. The SCS growth is based on indicative calculations that weights the industry growth by SCS' contribution to the Tasmanian Labour Force (as at September 2016)

Tasmanian Employment Projections (Nov-2015 - Nov-2020)

Industry	Employment (Nov-15)	Employment (Nov-20)	Tasmanian Growth		SCS Growth
Accommodation and Food Services	20,201	22,737	2,536	12.56%	168
Administrative and Support Services	6,521	6,688	167	2.56%	11
Agriculture, Forestry and Fishing	13,609	14,164	555	4.08%	37
Arts and Recreation Services	4,296	4,407	111	2.58%	7
Construction	19,772	21,325	1,553	7.85%	103
Education and Training	20,135	21,359	1,224	6.08%	81
Electricity, Gas, Water and Waste Services	3,854	3,675	(179)	-4.65%	(12)
Financial and Insurance Services	5,307	5,689	383	7.21%	25
Health Care and Social Assistance	32,840	36,620	3,780	11.51%	251
Information Media and Telecommunications	3,984	4,057	73	1.82%	5
Manufacturing	18,742	17,771	(971)	-5.18%	(64)
Mining	3,006	2,572	(433)	-14.42%	(29)
Other Services	9,363	9,406	43	0.46%	3
Professional, Scientific and Technical Services	11,564	12,114	550	4.75%	36
Public Administration and Safety	17,926	18,787	860	4.80%	57
Rental, Hiring and Real Estate Services	3,621	4,048	427	11.79%	28
Retail Trade	26,291	27,545	1,255	4.77%	83
Transport, Postal and Warehousing	10,763	11,128	365	3.39%	24
Wholesale Trade	6,963	6,964	1	0.02%	8
Total Industry	**238,758**	**251,056**	**12,298**	**5.15%**	**815**

Chef, customer service, front of house

Aquaculture, wineries, fruit all requiring middle management and 'hands-on' skills

Carpenters, bricklayers

Nurses, carers, support workers

Truck drivers, mechanics, engineers

4. What activities are needed to address the workforce capability and capacity gap in the regions?

The study has identified a range of workforce development activities that can be pursued to help to address the workforce capability and capacity gaps that have been found. Those that have been identified in Section 2 are summarised in the Table below

THEME #1: TRAINING AND EDUCATION INVESTMENT AND REFORM		
#	**Workforce development initiatives**	**Rationale**
1.1	**Strengthen education and industry links/ align training to industry needs**	*Some courses have not equipped students to be job ready due to the structure and content of the course or the methods and quality of delivery. Education and skills training has not necessarily aligned with industry needs. The co-design of both Certificate level courses, courses that deliver Statements of Attainment and other short courses need to match job requirements*
1.2	**Ensure a responsive and contemporary TasTAFE that meets industry needs**	*TasTAFE is the single largest player in vocational education and training. Its performance has attracted mixed reviews and notwithstanding the gains now being made, there would appear to be further upside. TasTAFE's Education Architecture Project should better inform its service delivery model going forward*
1.3	**Improve delivery of training to regional communities to develop their workforces**	*TasTAFE and the smaller RTOs have scope to continue expand the delivery of courses in regional communities. Issues associated with the cost of training and smaller class sizes should not be impediments to the provision of training in region. Structural and funding limitations that inhibit dual enrolment (which allows student and adult learners to both enroll in the same course to optimise attendance numbers) need to be addressed*
1.4	**Continuing to develop better linkages between education and employment through school-based apprenticeships**	*School based apprenticeships require students to complete TCE while concurrently gaining on-the-job skills through placement with employers. This form of education and training is gathering momentum and would appear to have particular application to the skills needed in the growth industries of the regions*
1.5	**Continue to roll-out various other initiatives that improve pre-employment and employability skills**	*Low employability skills for too many candidates has been reported. Prospective workers still at school that come from disadvantaged backgrounds and longer term unemployed need further support to develop basic skills that would allow them to be considered by prospective employers e.g. Beacon Foundation and Your Town funded programs*
1.6	**The Trade Training Centres can play an even greater roll as the hub for regional skill development**	*The Trade Training Centre had been dormant for some years before being structurally aligned and settled in DoE. Momentum in these centres is now building, with the Huon being held out as an exemplar, which is now being followed by Bridgewater and Sorell. Given their positioning in the regions and their abundance of space on which to expand, these can play an even greater role going forward as the hub of trade training for industries operating in the regions*

4. What activities are needed to address the workforce capability and capacity gap in the regions?

The study has identified a range of workforce development activities that can be pursued to help to address the workforce capability and capacity gaps that have been found. Those that have been identified in the various sector workforce development plans and through our consultations, which are more common to all industries in the region are summarised in the table below.

THEME #2: PROMOTE PATHWAYS INTO SKILLED EMPLOYMENT		
#	Workforce development initiatives	Rationale
2.1	**Promote each industry as a career in a competitive market for labour**	*Many industries are not seen as offering a career. Rather some industries are seen as offering 'stop-gap' employment while waiting or being educated for other jobs. There are many industries with significant levels of lower-middle management that offer a genuine career path between the owner/ operator and the entry level/ low skilled jobs*
2.2	**Develop career maps/ portals to match employee and industry needs**	*Career maps and electronic portals can more easily connect prospective employees with employers. Hubs such as these have recently been developed and are now being used in the aged care and agricultural sectors.*
2.3	**Tap into new sources of labour, increase recruitment entry points**	*There are significant reserves of unemployed or under employed labour in the regions which could be available to industries in need of workers now and into the future. This labour needs to be motivated and mobilised in order to meet the labour needs of regionally based employers*
2.4	**Undertake and implement industry based workforce planning**	*Many of the industries that have been within the scope of this study have prepared workforce development plans. The execution of actions in these plans appears to have been variable. A key to the success of sector based workforce planning is establishing effective governance arrangements to drive the implementation of the plans*
2.5	**Develop/ improve training and retention culture in the industry**	*Some industries / employers have not embraced training as legitimate investment. Training and development needs to be regarded as a mechanism to attract, retain and develop workforces rather than an unproductive overhead.*

4. What activities are needed to address the workforce capability and capacity gap in the regions?

The study has identified a range of workforce development activities that can be pursued to help to address the workforce capability and capacity gaps that have been found. Those that have been identified in the various sector workforce development plans and through our consultations, which are more common to all industries in the region are summarised in the table below.

THEME #3: IDENTIFY BEST PRACTICE BUSINESS MODELS TO ADAPT TO WORKFORCE CHANGES		
#	**Workforce development initiatives**	**Rationale**
3.1	**Investigate impediments and options for the JA model to more effectively meet the needs of industry**	*JAs tend to provide job support services for longer term unemployed in regions who may come from disadvantaged backgrounds and do not have adequate employability skills. The funding model that drives the JAs appears to not suit the needs of industry and incentives offered to take on employees are not attractive to industry*
3.2	**Improve access to accommodation and transport services to support training and employment in the regions**	*Accommodation and public transport for workers in regional communities remains a challenge and deterrent to attracting and retaining labour. Examples of employers securing land and constructing accommodation for workers have been found that are illustrative of approaches that industries/ employers may need to adopt*
3.3	**Build innovative business models and entrepreneurial approaches to meeting regional employment requirements**	*Non-traditional models of sourcing, connecting, managing and deploying labour in remote regions with disparate industries may be required outside of more traditional recruitment models within an industry. Innovative labour hire models and regional 'job hub' models (such as Huon Valley Works) may provide inspiration for adopting new approaches to regional employment and development. The feasibility of this model being replicated in other regions should be investigated*
3.4	**Adopt more flexible working arrangements to address seasonality of employment considerations**	*Seasonal demand for workers varies across industries, which creates periods of over supply and under supply of labour. Greater cooperation across industries in regions could smooth out peaks and troughs in demand for labour*
3.5	**Develop the roll of the councils in the regions as facilitators of regional and workforce development**	*The regional councils are leaders and key players in regional development. Councils are also significant employers of labour in the regions in their own right. There would appear to be scope for councils to take on greater roles in advocating, activating and facilitating connection between education and industry in the regions as part of their broader regional development mandate*

Implementation framework

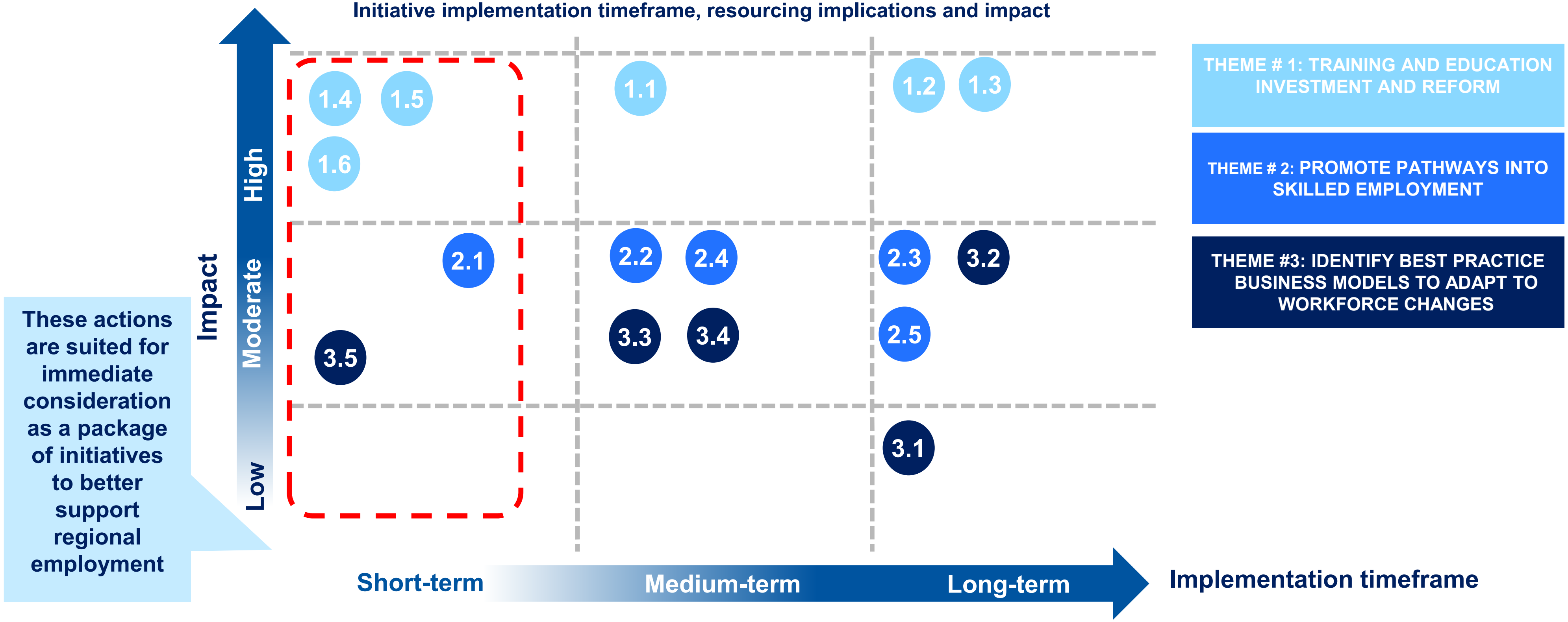
The proposed workforce development initiatives are presented below with a high-level assessment of impact and timeframe. This assessment identifies initiatives that can potentially be implemented (or expanded/ promoted) immediately with less complexity compared to those that would appear to be more complex due to the nature of the stakeholders, systems and process that would require reform. Three categories have been used in relation to implementation time frames:

— Short-term: implementable in the next 6-12 months;

— Medium-term: implementable in the next 2-3 years; and

— Long-term: implementable in 3+ years.

Initiative implementation timeframe, resourcing implications and impact



Section 1: Current regional profile

What is the economic and social profile of the region and how has this changed?

Current regional profile

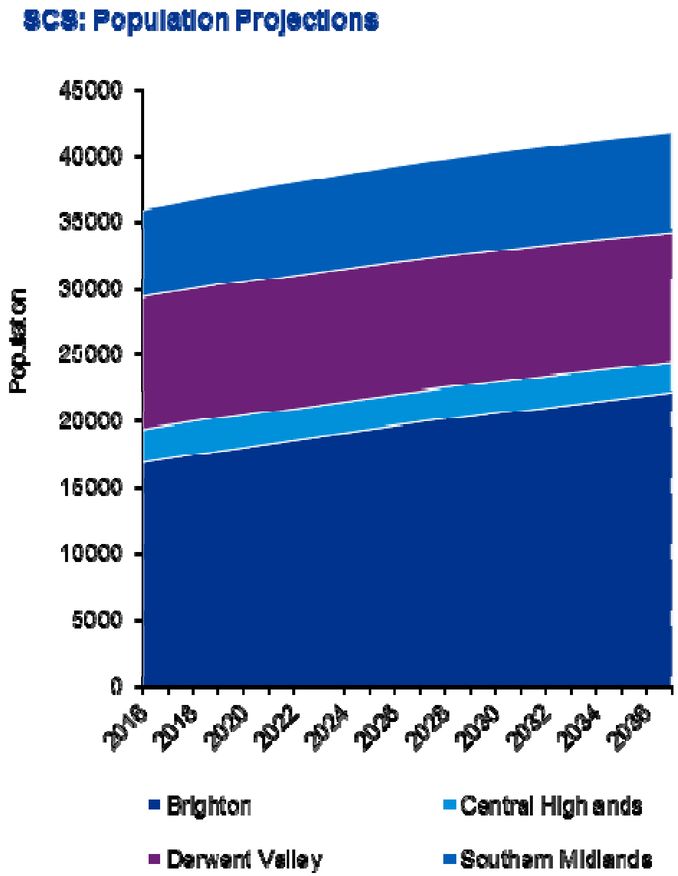
SCS Summary Profile

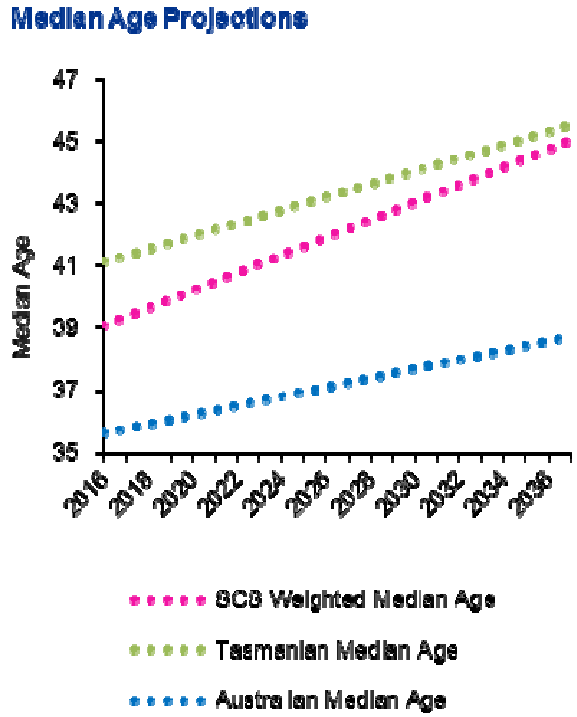
Community Profile				
Demographics	**Brighton**	**Central Highlands**	**Derwent Valley**	**Southern Midlands**
Population	16,010	2,309	10,026	6,278
Area (sqkm)	171	7,982	4,108	2,615
Density (per sqkm)	93.5	0.3	2.4	2.4
Median Age	37	47	42	42
Income Statistics				
Average Income	$44,986	$36,807	$44,335	$42,128
Working Median Age	41	47	44	46
Government Support	32%	33%	35%	29%
Economic Profile				
Gross Regional Product	$326 million	$107 million	$326 million	$154 million
Local Jobs	3,464	695	2,523	1,291
Labour Force (Sept 2016)	7,144	1,064	4,551	3,072
Unemployment Rate (Sept 2016)	10.4%	6.3%	8.2%	3.6%
Socio-economic Index for Areas				
Advantage / Disadvantage Index Rank (TAS/AUS)	1 / 39	6 / 61	4 / 50	13 / 106
Education and Occupation Index Rank (TAS/AUS)	1 / 11	14 / 83	3 / 16	11 /55
Post School Qualifications	43.4%	44.1%	43.0%	42.6%

Population

Population

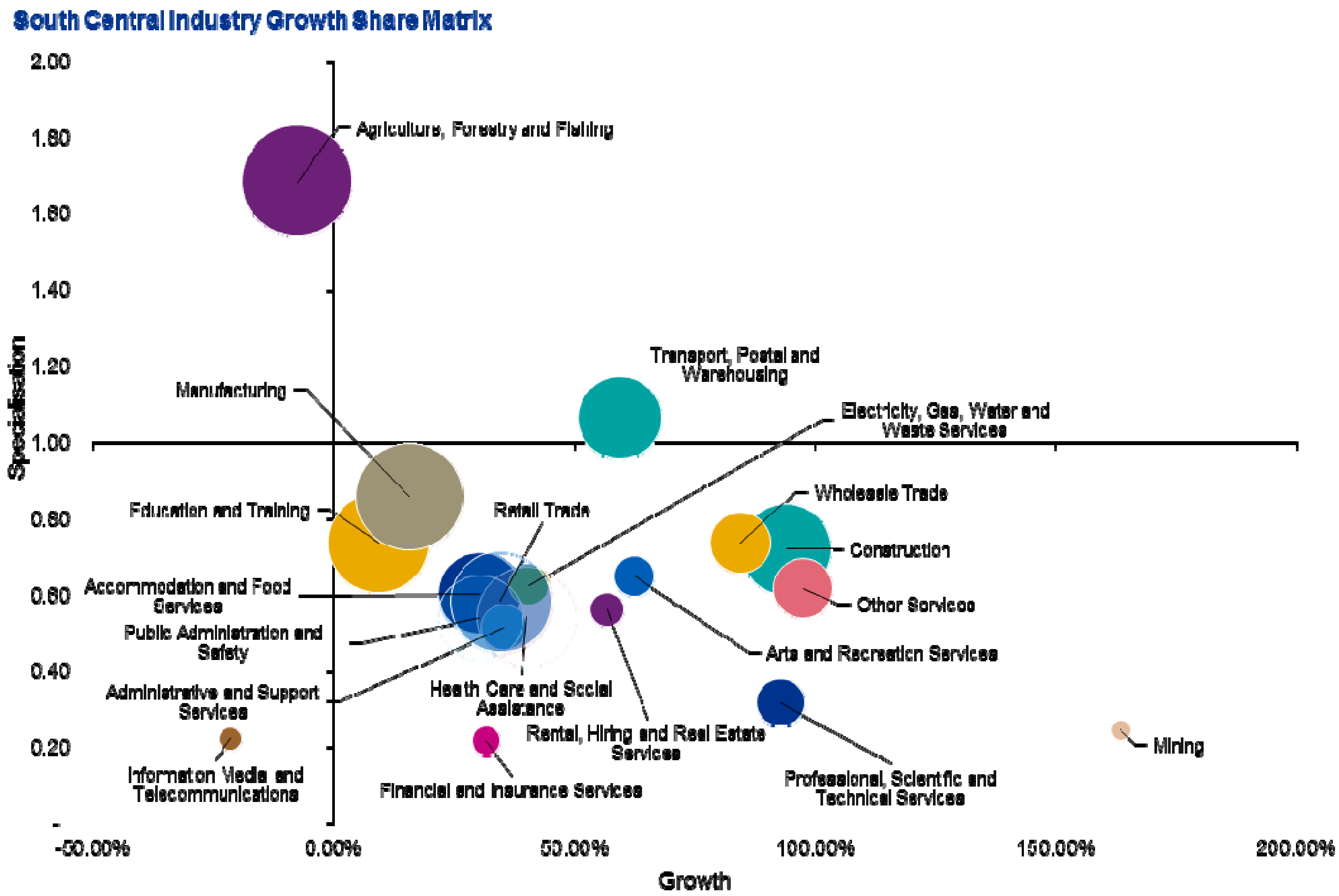
- Brighton has the largest population in the SCS region with 16,010 followed by Derwent Valley with 10,026, Southern Midlands with 6,278 and Central Highlands with 2,309. Brighton has the largest population density with 93.5/sqkm, whilst the remaining councils range from 0.3/sqkm – 2.4/sqkm in population density.
- Brighton has the youngest population with a median age of 37 followed by an equally tied Derwent Valley and Southern Midlands with 42. Central Highlands has the oldest population with a median age of 47.
- Brighton will experience the highest growth of 30.5% with the median age moving from 34 to 40 years. Southern Midlands will experience growth of 13.5% and is aging at the fastest rate with the median age increasing from 44 – 52 years. Derwent Valley will experience a minor decline in population by 1.2% with the median age increasing from 41 to 47 years. Central Highlands will also experience a decline of 6.7% and a median age increase from 47 to 54 years.





Industries

- The industry share matrix depicts the size of the industries (by number of jobs), the level of growth and the degree of specialisation relative to the Tasmanian industry structure.
- The largest industries in SCS are agriculture, forestry and fishing, manufacturing and education and training.
- The industries with the largest level of specialisation include agriculture, forestry and fishing, transport, postal and warehousing and manufacturing
- The industries that have had the largest amount of growth include mining and construction.
- The agriculture, forestry and fishing and information, media and telecommunications industries are the only industries experiencing growth.



Regional profile

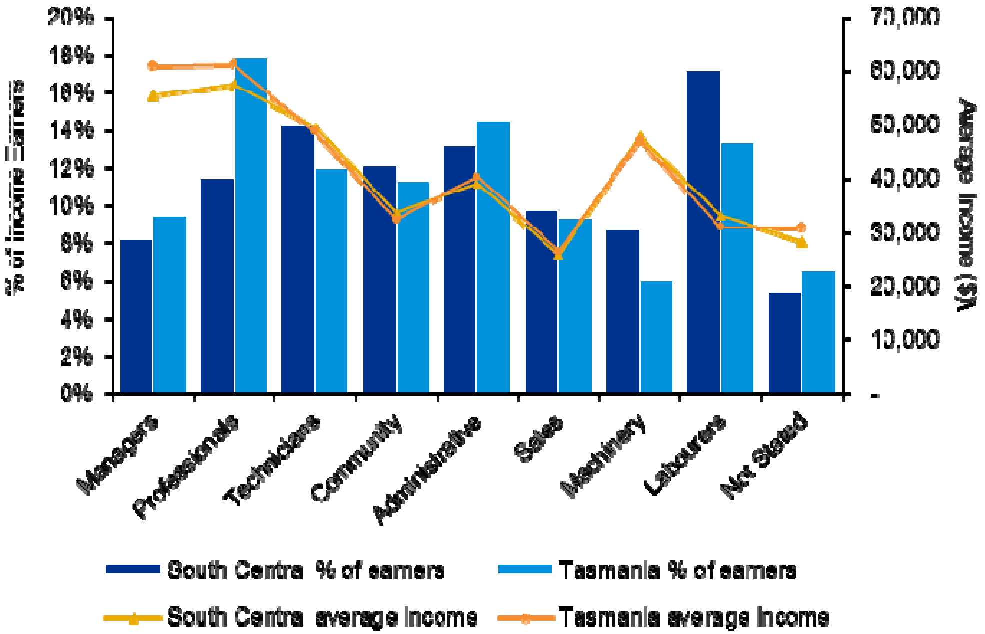
Occupations

Occupations

The graph depicts the percentage of income earners in a given occupation and the average income per income earner per a given occupation for the SCS region. The graph on the right indicates the following:

- There are proportionately less managers, professionals and administrative income earners in SCS than Tasmania
- There is a proportionately larger number of technical, community, sales, machinery and labourer based income earners in comparison to Tasmania
- A large differential in favour of Tasmania shows 18% of Tasmanian income earners are professionals versus SCS's 11%
- The top three occupations in the SCS are labourers with 17%, technicians with 14% and administrative income earners with 13%
- In general the data indicates the income on average is consistent with Tasmania. Two exceptions are the managers and professionals occupations
- For managers the average income for SCS is $55,514 versus Tasmania's $60,824
- For professionals the average income for SCS is $57,522 versus Tasmania's $61,123

Occupations of income earners and average wage by Region



Agriculture

Agriculture

The table to the right presents a summary of agricultural production within the SCS and respective council areas. Note that the latest data for local government areas in relation to agriculture dates to 2011.

The table presents the following findings:

- 28.4% of the SCS region is held for agricultural purposes. This is relatively higher than Tasmania which has 24.3% of the state held for agricultural purposes.
- The SCS area makes up 21.9% of the state.
- The SCS produces 64.1% of the state's cherries, 25% of the state's olives and 22.7% of the state's apricots.
- 12.8% of the state's wine production is derived in the SCS.
- 36.3% of the state's sheep and 21.4% of the state's other livestock is held within the SCS.

Summary of Agricultural Production

	Brighton	Central Highlands	Derwent Valley	Southern Midlands	SCS	Tasmania
% Area held for Agriculture	41.56%	25.90%	3.82%	73.50%	28.4%	24.3%
% Agriculture Area Compared to Tas Total	0.25%	11.74%	6.04%	3.85%	21.9%	100.0%
Fruit and Veg						
Lettuce (kg)	0.0%	0.0%	0.0%	0.0%	0.0%	2,767,919
Peas (kg)	0.0%	0.0%	0.0%	1.1%	1.1%	13,240,632
Potatoes (t)	0.0%	0.0%	1.1%	0.1%	1.2%	251,752
Apricots (kg)	0.0%	0.0%	0.0%	22.7%	22.7%	1,845,540
Cherries (kg)	11.1%	0.2%	42.8%	10.0%	64.1%	3,416,145
Olives (kg)	0.0%	0.0%	25.0%	0.0%	25.0%	71,122
Apples (kg)	0.0%	0.0%	0.9%	0.9%	1.8%	27,253,872
Pears (kg)	0.0%	0.0%	0.0%	0.2%	0.2%	844,908
Walnuts (total trees)	0.0%	0.0%	0.0%	0.0%	0.0%	214,223
Straw berries (kg)	0.0%	0.0%	0.0%	0.0%	0.0%	417,379
Wine						
Wine Production (t)	1.49%	5.40%	1.49%	4.45%	12.8%	7,446
Livestock						
Dairy Cattle (no.)	0.0%	1.1%	0.7%	0.4%	2.1%	222,628
Meat Cattle (no.)	0.2%	2.8%	0.5%	2.4%	5.9%	466,583
Sheep (no.)	0.5%	15.1%	1.0%	19.7%	36.3%	2,344,469
Pigs (no.)	0.1%	0.1%	0.3%	3.0%	3.5%	12,833
Other Livestock (no.)	0.9%	13.7%	3.0%	3.8%	21.4%	13,741

Other Highlights

Tourism

New Norfolk was the most visited location in the year ending September 2016 followed by Derwent Bridge, Oatlands and then Bothwell. All of these locations have experienced growth in the number of visits. New Norfolk had the highest number of nights stayed (September 2016), however, each location experienced its peak in average nights stayed during 2014.

SEIFA

The SEIFA index of relative socio-economic advantage and disadvantage indicates that Southern Midlands is most advantaged council relative to the councils in the SCS. The SCS councils ranked from top to bottom are Southern Midlands, Central Highlands, Derwent Valley and then Brighton. Southern Midlands is ranked slightly under the Tasmanian median whilst the remaining councils rank in the bottom 25% of Tasmania. All councils within the SCS are ranked in Australia's bottom 25%.

The SEIFA index of education and occupations ranks Central Highlands and Southern Midlands in the fifth (41% - 50%) and fourth (31% - 40%) deciles of Tasmania. Derwent Valley and Brighton both rank in the bottom 25% of Tasmania. All of the councils in the SCS rank in the bottom 25% of Australia. All of the councils in the SCS has proportionately less persons that have attained post school qualifications in comparison to Tasmania.

Section 2: Education and jobs support profile

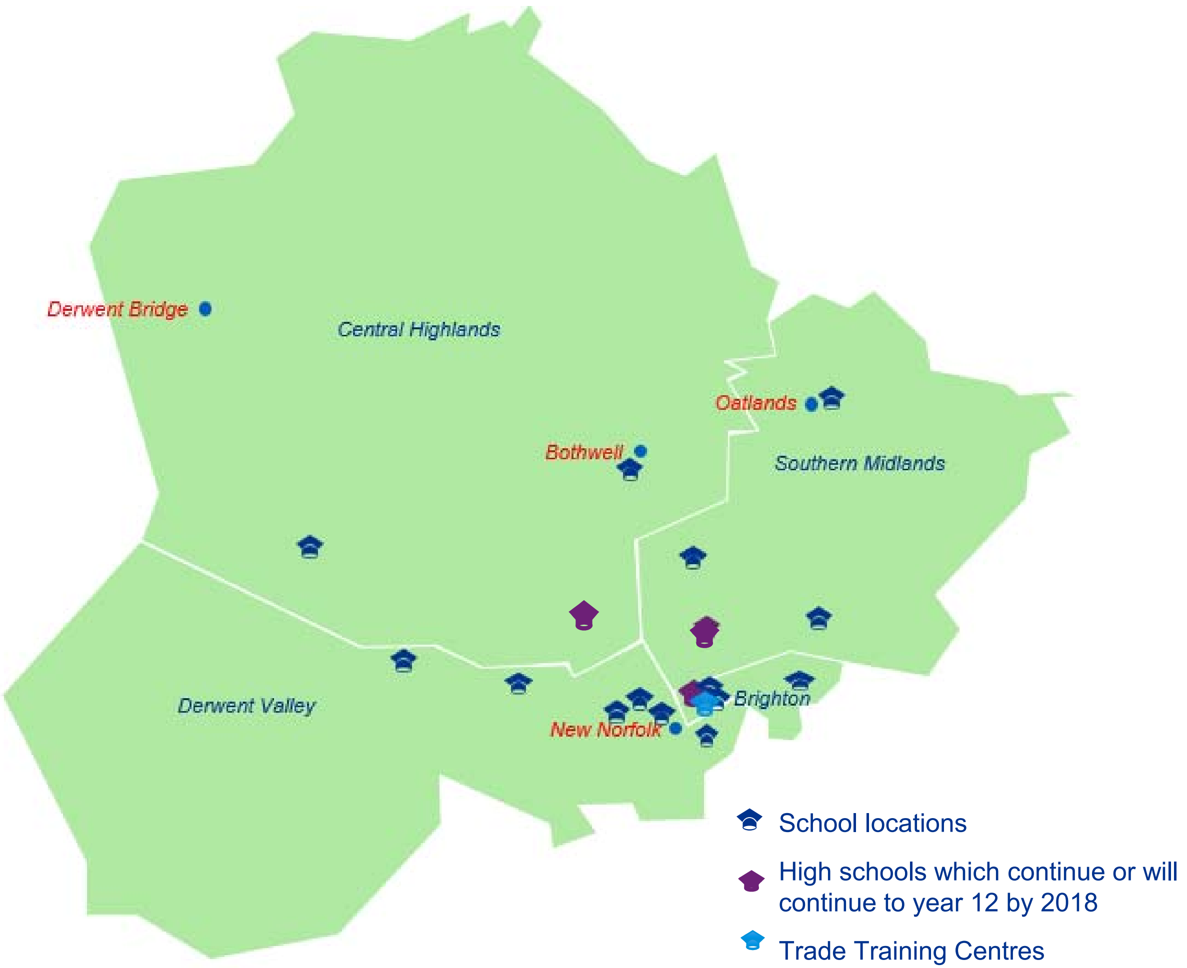
What is the education and jobs support profile?

Summary issues & strategies - education, training and employment

Childcare, primary and secondary education	Trade Training Centres, and VET	Job Actives
Emerging key issues		
1. Some issues around access to childcare for parents seeking employment 2. Design of training programs that balance skills with qualifications 3. Need for education to be more targeted to the need of industry for students at an earlier age 4. Career advisory support to students in secondary may not yet be adequately filled by “MyEducation” and other supports	1. Some courses not being run in the regions due to the costs of delivering training to smaller classes 2. Some perception that TasTAFE has scope to improve its service delivery and reputation 3. A perception that industry sectors receive skill development funding in a fairly ad hoc manner	1. JSAs tend to provide job support services for longer term unemployed in regions who may come from disadvantaged backgrounds and do not have adequate employability skills 2. The funding model that drives the JSA may not suit the needs of industry and incentives offered to take on some employees are not attractive to industry
Emerging opportunities and strategies		
1. Continuing to develop better linkages between education and employment through school-based apprenticeships 2. Continuing to roll-out various other initiatives that improve pre-employment employability skills e.g. Beacon Foundation and Your Town funded programs	1. TasTAFE’s Education Architecture Project, which will better inform its service delivery model going forward 2. Dual enrolment that allows student and adult learners to both enroll in the same course to optimise attendance numbers 3. Further collaboration between TasTAFE and RTOs in delivering training to the regions 4. Continue to fund and develop Trade Training Centres as the key hub for regional education and industry development in the SERDA and SCS regions – Sorell, Triabunna, Nubeena and Bridgewater, building on the exemplar Huon TTC	1. JSAs can play a important role in linking unemployed and under-employed job seekers with training and employment opportunities by further collaboration with RTOs and industry

Education profile

Public education facilities



School	Council Region	Years
Brighton Primary School	Brighton	Primary
Jordan River Learning Federation	Brighton (multiple campuses)	Pre-K to 12
Bridgewater Trade Training Centre	Brighton	Post year 10
Fairview Primary School	Derwent Valley	Primary
Glenora District School	Derwent Valley	K-12
Molesworth Primary School	Derwent Valley	Primary
New Norfolk Primary School	Derwent Valley	Primary
New Norfolk High School	Derwent Valley	7-12
Westerway Primary School	Derwent Valley	Primary
Ouse District School	Central Highlands	Primary
Bothwell District High School	Central Highlands	Primary and Secondary
Bagdad Primary Schools	Southern Midlands	Primary
Kempton Primary School	Southern Midlands	Primary
Campania District School	Southern Midlands	K-12
Oatlands District High School	Southern Midlands	Primary and Secondary

The SCS Region has 15 public schools, a Trade Training Centre at Bridgewater and 4 high schools that will extend to year 12 by 2018

Education profile

VET enrollments

The SCS region had 3,937 enrollments in Vocational Education Training in 2016.

The largest provider of courses was TasTAFE, providing 53% of all courses

The most popular category of study was Community Services, followed by Business Services, and Tourism, Travel, and Hospitality.

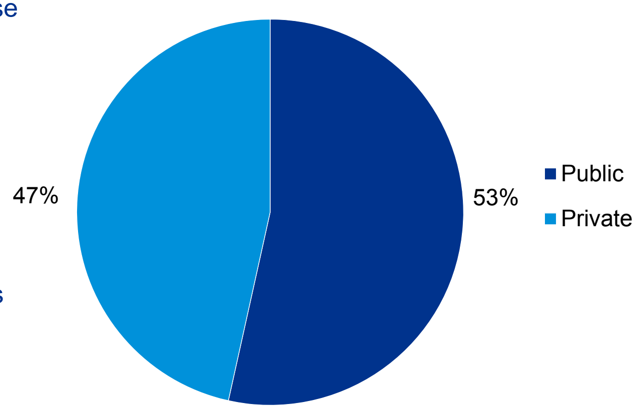
VET Enrollments

The charts to the right present the breakdown of course providers and course areas across the SCS region.

Course providers

- The chart to the right indicates that there is almost a fifty/fifty split between private and public course providers
- 47% of courses are offered by private sector RTOs and the remaining 53% is offered by TasTafe.

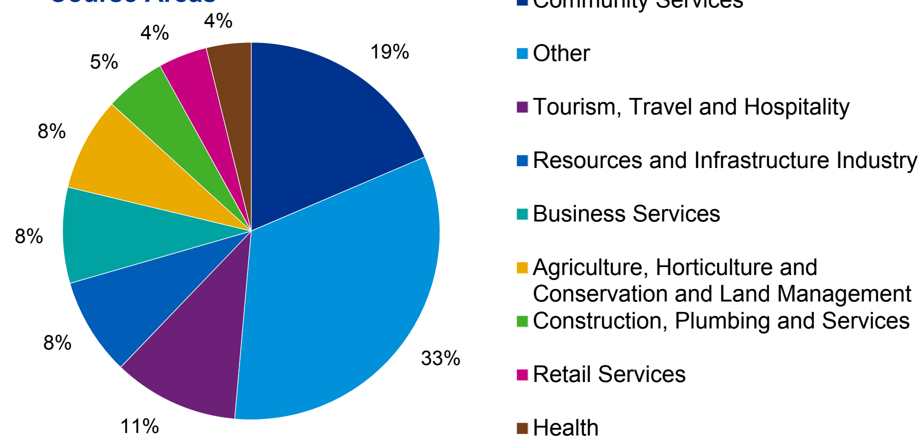
Course Providers



Course Areas

- The most popular category of courses enrolled in is Community Services, with 513 enrollments, from a total of 2762*
- The next popular area was Tourism, Travel, and Hospitality (297) followed by Resources and Infrastructure (231)
- Courses in the 'Other' category include Automotive Retail, Service, and Repair (99), Information and Communications Technology (98), and Transport and Logistics (77).

Course Areas



Excludes "Unknown", "Accredited Courses" and "Non-Accredited Courses" amounting to 1175

Education profile

Bridgewater Trade Training Centre

Qualification courses

- Certificate II Horticulture
- Certificate II Building and Construction
- Certificate II Automotive Vocational Preparation
- Certificate II Horticulture
- Certificate II Business
- Certificate I Hospitality
- Certificate I Engineering
- Certificate I Construction

Short courses/statements of attainment

- First Aid
- Basic Fabrication Skill Set
- Customised Painting
- Bricklaying

TASC courses

- Work Readiness
- Personal Pathway Planning
- Workshop Techniques partnered with Certificate I Construction
- Basic Road Safety

1 – View on arrival

2 – Space for training in plumbing and drainage

3 – Fully equipped commercial kitchen

Primary and secondary education

Our limited consultations found some issues including:

- Some issues around access to childcare for parents seeking employment
- Loss of Pathway Planners in secondary schools has left a void not adequately filled by "MyEducation" and other supports
- Design of training programs that balance skills with qualifications

Key opportunities include:

- Continuing to develop better linkages between education and employment through school-based apprenticeships
- Continuing to roll-out various other initiatives that improve pre-employment employability skills e.g. Beacon Foundation and Your Town funded programs

Issues

- Lack of childcare options and cost can be prohibitive to people wanting to retrain in readiness to re-enter the workforce - only 1 childcare centre in the south east at Midway Point
- The implementation of the roll-out of the early-start in primary schools may impact on the access to childcare
- Year 10 students in particular are not able to do certified training courses; only allowed to do Statements of Attainment
- Developing training programs that cherry pick subjects from a Certificate course could be a quick fix, but could lead to fewer completions and under employment
- Need more support for the 5,000 kids leaving year 12 (1,500 will go onto University, leaving 3,500 that will seek alternatives
- Pathway Planners would continue to be helpful; this gap has been plugged by the Industry Liaison Officer; Sorell could perhaps also use one
- The removal of 60 Career Planners (1:350 students) from high schools has not had a positive impact. MyEducation is not sufficient for many kids and relies on teachers to have the time, interest and knowledge to act as pseudo-career advisers.

Opportunities

- The expansion of year 11/12 at Sorell, Campania and Triabunna schools through the Teganna project is giving students better opportunities to continue VET/ tertiary education in their chosen field and this will hopefully improve retention rates
- The Jordan River Learning Federation (JRLF) comprises 3 primary schools, 1 senior school (7-12), the school farm and the Bridgewater TTC, which collectively span Kinder to Year 12 and beyond. It was established 8 years ago and is overseen by a Board comprising the four Principals. The view is education needs to be targeted for future employment
- Extension of schools to Year 12 could be positive if focus is on attainment, not just retention. JRLF now has 90 students in years 11 and 12 who are doing a combination of TCE and VET subjects which combine to attain a TCE
- The model of school-based apprenticeships is beneficial in terms of youth engagement and learning on-the-job skills while still at school
- MyEducation has been successful and the system does not need additional Pathway Planners; one additional school-based apprenticeship advisor for a region would be a better use of resources. Sorell, Bridgewater and Oatlands High Schools have relationships with Beacon Foundation, which aims to improve employability skills

TasTAFE and Registered Training Organisations

Our limited consultations found some issues including:

- Some courses not being run in the regions due to the costs of delivering training to smaller classes
- Some perception that TasTAFE has scope to improve its service delivery and reputation
- A perception that industry sectors receive skill development funding in a fairly ad hoc manner

Key opportunities include:

- TasTAFE's Education Architecture Project, which will better inform its service delivery model going forward
- Dual enrolment that allows student and adult learners to both enroll in the same course to optimise attendance numbers
- Further collaboration between TasTAFE and RTOs in delivering training to the regions

Issues

- Lack of VET choices in the south east
- Signs of labour and skill shortages in the tourism and hospitality industry; SERDA and SCS have similar challenges to other parts of Tasmania
- Need to offer more skill set type training as opposed to full qualifications (Cert I, II, III, IV) in conjunction with TTCs
- Offer more on the training, on employee premises; need to focus on basis job readiness skills - presentation, timeliness, fitness, communication etc.
- Expectation of unrealistic enrolments for training in rural/ regional areas- TasTAFE expect enrolments to be the same as what they get at their city campuses i.e. 14 +-courses cancelled or not started due to minimum numbers not being met, therefore people miss out on training
- TasTAFE model is block release, which does not suit employers
- TasTAFE in not inclined to run courses with fewer than 12-14 participants. Some other RTOs believe an additional subsidy may be needed to offset costs of delivering programs in regions
- TasTAFE has lost reputation-Drysdale qualifications in particular are no longer valued by the hospitality industry; TasTAFE has 6 commercial kitchens at Drysdale, but is only using two and has historically been disinclined to sub-let these facilities-this may be changing
- Skills Tas have offered a significant amount of funding into programs that have been seen by some as not connected

Opportunities

- Financial assistance for childcare while guardians are participating in training
- Potentially rationalise the number of training providers
- The ultimate solution is dual enrolment i.e. yr 11/12 students and adult learners being funded by DoE and Skills Tas to enrol into programs as a matter of course, rather than as a special arrangement. E.g. in order to deliver an aged care Cert II course, TasTAFE or other RTOs need 12 students to break even (16 will make a profit and 8 will be a loss). If they are unable to fill 12 places with adult learners, they should be able to offer vacancies to year 11/12 students
- TasTAFE and TTC work well together. Some other RTOs also using facilities including GlobalNet, On-Road/ Off-Road. TasTAFE is attempting to approve its competitiveness. Its upcoming Education Architecture Project should help to link training with industry needs which is the current major issue
- RTOs are playing a role in some higher quality specialist areas; e.g. Industry Link has applied to Skills Tas for funding to deliver training in the regions using the Trade Training Centres - 4-5 units, 6 days over 2 weeks, under the banner of 'Hospitality Statewide'. They have used the Huon and Sorell TTC kitchens
- Various initiatives are underway including review of the year 9-12 curriculum, changes to VET Student Loans to lower cost of system, and changes to the national partnership arrangement

Education and jobs support profile

Trade Training Centres

Our limited consultations found some issues including:

- Signs of apathy in regional communities to attend training
- Inter-generational social disadvantage in some regions cannot be turned around quickly
- The TTC have been under-utilsed and not well connected with industry needs, but things are changing

Key opportunities include:

- Continue to fund and develop the TTCs as the key hub for regional education and industry development in the SERDA and SCS regions – Sorell, Triabunna, Nubeena and Bridgewater, building on the exemplar Huon TTC

Issues

- TTCs are awakening after period on no activity – these offer great flexibility to deliver diverse programs and can act as a social hub/community connector
- TTCs currently have limited training spaces, but new classrooms and other infrastructure is being funded
- There have been some public transport issues e.g. between Sorell and Triabunna, but there may be a solution forming
- Largest barrier to supply is the apathy of prospective students e.g. struggled to get 10 to do a 6 day hospitality course at Nubeena. This was Skills Tas funded and was to be delivered by IndustryLink (RTO)
- The SERDA and SCS regions are more generally lower socio-economic, which can drive some inter-generational issues that cannot be easily resolved
- The apathy has resulted in some employers resorting to immigration to source the quantity and quality of skills needed, with a stronger work ethic; e.g. Stewart's Bay lodge was forced to close 2 days per week because can't get staff; the colder months tends to see an increase in the drop-out rate
- Farm School has had a strong VET emphasis but it does not meet the needs of industry. TTCs will increase its current Board of 3 with 5 additional representatives from industry to strengths ties between education and employment
- Still understanding industry needs in terms of demand and supply; have mainly been relying on Industry Liaison Officer in Bridgewater

Opportunities

- There are 12 TTCs in Tasmania and 8 Coordinators; there are 4 TTCs in the SERDA/ SCS regions - Bridgewater, Triabunna, Nubeena and Sorell and 2 Coordinators. Their role is to broker training and manage the training assets/ infrastructure. Buildings were commonwealth funded 5 years ago and the State pays around $1.6M p.a. for recurrent costs, including salaries of the TTC Coordinators. Training programs are funded by a combination of TasTAFE, RTOs and the DoE. The overall model is starting to work well despite some weaknesses
- A new shed has been built at the Sorell TTC to run construction courses. This will target year 11 and 12 students to get Cert II, as industry does not want higher qualifications because of the requirement to pay a higher percentage of the award wage. Students would do 2 days per week at Sorell and 3 days per week at Rosny
- TTCs are increasing with strong management committees forming that have a strong involvement of major employers in the regions
- Personalised model of TCE - VBET and TCE bundled together to get TCE qualification; Bridgewater TTC has appointed an Industry Liaison Officer whose role is to work with employers
- Councils can facilitate linkages between community and industry. A Job Expo role may be reasonable
- The Bridgewater TTC are soon to commence building a café near its kitchen which will provide hands on hospitality training

Job Actives

Our limited consultations found some issues including:

- JSAs tend to provide job support services for long term unemployed in regions who may come from disadvantaged backgrounds and do not have adequate employability skills
- The funding model that drives the JSA does not appear to suit the needs of industry and incentives offered to take on employees are not attractive to industry
- Access to transport and accommodation is an issue for some employees in the regions

Key opportunities include:

- Potential role for Job Actives to act as intermediaries between job seekers and employers

Issues

- Lack of support offered by Job Service Actives (JSA) – not nominating their client base for courses
- Not servicing their clients; only able to fund Cert III clients and above
- The Job active model is flawed - incentives are skewed to get Cert III placements, but should also be funded to get Cert I and II. There is no financial incentive to get employees through just Cert I and II courses
- Even though the main focus is employability, the job active model can provide competence, but not character – must be forged over time if coming from a disadvantaged background
- Access to public transport is a limiting factor for some people in the regions
- Accommodation for workers is an issue for some employees in remote areas
- Employers are more interested in candidates having skills, not qualifications and some Certificate courses are not providing the skills employers need

Opportunities

- Increasing potential role for Job Actives to work as an intermediary between job seeks and employers and RTOs to structure training programs that match employer needs with Job Active client capabilities and training needs

Other matters raised in consultations

Secondary education

1. Beacon Foundation is a national NFP, started in Tasmania by Bill Lawson. It has grown and now has multiple funding sources from Federal Government ($1M), 30 national industry partners/ major employers, donations and State Government. It has now secured funding from the Paul Ramsay Foundation ($10M) and State Government ($5M) to spend $15M over 5 years in Tasmania to improve year 12 retention, which will assist employability skills, provide pathways to TAFE and University and help bridge education and industry sectors. The Collaborative Ed program will target public secondary schools with an ICSCA score of < 1,000 on the My School rankings, only Riverside and Taroona in Tasmania have a score > 1,000. The aim is to conduct 3 years of activities in schools and embed systems and processes that will be self sustaining after Beacon's involvement is concluded. Lessons will be co-designed between teachers and employers –a Collaborative Classroom. Various other programs have been run including Work Readiness, a series of 43 x 1 day programs across Tasmania to improve employability (20 were delivered in the Trade Training Centres)
2. The Beacon-led 'Collective Ed' will see 3 new staff embedded into 6 schools across Tasmania, including Bridgewater (Jordan River Learning Foundation) and Rokeby (Bayview Secondary College). The 3 new staff will comprise of a Teacher Coach, Business Attractor and a Working with Families representative. Tasmanian Building Group Apprenticeship Scheme (David Fagan) has been funded to deliver 12 school-based apprenticeships using a 'block release' model, which is more attractive to employers rather than 2 days per week

Job Active and other employment service providers

1. Your Town provides employment services for young disadvantaged people, collocated with Max Employment in Burnie, Devonport, Launceston, Bridgewater and Glenorchy. They service long term unemployed less than 30 years of age. Your Town is 75% self funded through the Boys Town raffle proceeds, aiming to secure Westpac seed funding to expand this business. It also delivers the Kids Helpline with $1.7M Federal funding but mostly funded by raffles. The Helpline has 130 social workers on the phone 24/7, and Tasmanian children account for 2% of contacts and 3.5K p.a.
2. Your Town's aim is to replicate the work environment on a NFP basis, securing contracts with councils and community housing providers etc for basic jobs such as cutting grass, cleaning, graffiti removal, and recycling. It also involves some private work. University analysis has confirmed a 9:1 social return on investment; the social employment model focuses on basis employability skills and terms of employment usually lasting 3-6 months; they can also offer Cert qualifications and Statements of Attainment, but that is not their focus
3. Work Skills is one of three Job Active providers in southern Tasmania holding five year contracts with the Federal Government to connect unemployed people with jobs and/ or training opportunities. Up to 97% of Work Skills clients are receiving some form of Centrelink payment and approximately 1/3 are long term unemployed. Work Skills's client base varies and is approximately currently 4,000. Work Skills has 5 FTEs working with clients and 4 FTEs working with employers, industry peak bodies and RTOs. Federal funding covers general operating costs and additional 'outcome fees' are paid if a client can be placed into a job. The 'outcome fee' payable is structured so as to reward the Job Active the longer the client remains in employment
4. Huon Valley Works is an innovative, community based employment support provider, located in Geeveston. Huon Valley Works secured financial support from government to fund its establishment through an entity named Tas Works, which is company limited by guarantee. In order to develop a sustainable business model, TasWorks effectively provides a labour hire service, paying a wage to its employees (using an outsourced payroll provider), who are then available to local employers, who in turn pay back TasWorks. It has only been operating for 1-2 years, but in that time, has facilitated the placement of 35 people (13 FTE) into employment, mostly in roles such as fruit picking and entry level labouring with Huon Aquaculture and TaAnn. The Huon Valley Works operation and business model is soon to be the subject of an evaluation by government. It is hoped that Huon Valley Works can prove up' the business model and potentially have this replicated (and tailored) to other locations in Tasmania.

Other matters raised in consultations

Vocational education and training

1. The VET Fee help model was replaced by VET Student Loans to ensure only those serious about completing the course were to apply, and not applicants without the intention of completing the course. Only students doing Diploma courses (beyond Cert IV) can qualify for VET Student Loans, which is very restrictive. Only RTOs with 3 years of history delivering these courses are eligible to attract students with VET Students Loans and there has been a 2 year wait to become an approved VET provider who can train students receiving a loan. This has decreased the number of students and RTOs, and the attempt has been to deliver Skills Tas funded courses with no loans available to students. The key issue is constantly changing Ministers and rules, with the VET sector having 5 Federal Ministers in 6 years over 2 governments
2. Skills Tas offers a Special Skills Fund up to four times per year. RTOs can apply to source funding to deliver training. For some training programs students don't get qualifications but do units of study for which they receive Statements of Attainment that can count towards a Cert II. The aim is to choose specific modules that provide skills employers need rather than qualifications, as Cert I is not valued by industry. Some modules include making coffee, hygiene/ food handling, using a till/ EFTPOS, basic bar work (pouring beers) etc.
3. The VET sector in Tasmania receives a state government subsidy of $110M p.a., of which TasTAFE receives approximately $90M. Some other privately owned/ operated RTOs believe TasTAFE has some inherent constraints - teacher holidays, higher wages, limits to contact hours of 15 per week, a 35 hour work and may not always deliver the training that students and industry require. For example, the Cert III Commercial Cookery apprenticeship brings students from disparate employers together e.g. Grand Chancellor and Bicheno RSL. Some of the training is too high end and the regional students drop out/ feel inadequate/ don't get to apply skills learnt in the workplace. There may be scope to improve completion rates for regional students by changing to a new course, for example a Cert III in Catering Operations. After 2 years, students are qualified as a Cook and avoid the 6 high-end subjects that will often not be required in the regions. Students that wish to continue can become a Chef. This would need to be put on a National Register by Skills Tas to gain national acceptance for the qualification
4. Under the new Education Act, TasTAFE can register as a school and deliver Year 11 and 12 TQA subjects (mainly literacy and numeracy) as well as vocational skills courses, so that a student could come out of year 12 with a Cert II qualification

School based apprenticeships

1. There are 3 types of apprenticeships-post year 10/12 full-time, post-year 10/12 part-time, and school-based, up to 15 hours (2 days) maximum at work during school terms and longer during school holidays, and the other 3 days at school. This model of school-based apprenticeships is beneficial in terms of youth engagement and learning on-the-job skills while still at school. Students are paid as per the apprenticeship award i.e. 55% of award, but employers can pay more. This model get education and industry working better together rather than separately. Students complete year 12 with Cert III and can then work full time or transition to additional studies with VET or University. The student's contract (see below) is cancelled if school attendance drops
2. School-based apprenticeships did not have much success as a model prior to 2011; but since then DoE has been working hard to drive this model to build further student engagement with education. The paperwork is could be seen as a little daunting, involving a 5-way contract - employer, employee, training provider (RTO), parent, school
3. Skills Tas registers the contracts as above, and in 2016, there were 815 contracted school-based apprenticeships in place - around 600 government school and 200 independent school. In 2015-16, 73% of school-based apprentices were completed compared to 54% nationally, so completion rate in Tasmania is quite high. The model fits well in regional schools that have extended to year 12. Stornaway have a strong school-based apprenticeship model with some involvement from the Beacon Foundation

Section 3: Current state

What is the region's current workforce capability and capacity?

Current state

Common current workforce issues now

Common current workforce issues	Tourism and hospitality	Building and construction	Aged care, disability	Transport and logistics	Dairy	Fruit	Wine	Salmon
High demand for industry outputs/ services	■	■	■	■				
Ageing workforce	■			■			■	
Low employability skills			■	■		■		■
Industry attractiveness as career	■			■	■	■	■	■
Attractiveness for more highly skilled labour						■	■	
Seasonality of demand for labour	■					■	■	
Uncoordinated approach by industry					■			
Training/ development pathways/ programs	■	■				■	■	■
High reliance on part-time & casual labour			■			■		
High reliance on locally-based workers			■					
Difficulty attracting labour to regions	■				■			■
Competition from other industries for labour		■				■		■
Singular gender focus of workers	**Female**	**Male**	**Female**					**Male**
Access to worker accommodation	■					■		
Official skill shortages (Australian Government Department of Employment, Tasmania, 2016)	Chefs	Bricklayers Plasterers	Registered nurses	Drivers, mechanics, engineers				

Current state

What are the region's current workforce capability and capacity issues?

Tourism and hospitality	Building and construction	Aged care	Disability services	Transport and logistics
— Various labour supply issues currently affecting the industry – peak seasons, inadequate training programs, industry not seen as a career — Various skills issues and shortages currently affecting the industry - Lack of specific skills to support emerging markets - Need to improve partnerships between education, training providers and the industry — Difficulty attracting labour to regional areas — Improving access to affordable accommodation — Reducing transport barriers to employment — Current skills shortages – Chefs	— An ageing workforce may see the industry lose 10% of the workforce by 2020 and a further 15% over the next 15-20 years — The industry responds to demand which causes employment levels to fluctuate over short periods — Access to trade training and the four years required to be qualified — Non-completions of apprenticeships — Competition from other industries — Attracting females to the industry in general — Shortage of skilled workers who are able to perform conservation work to maintain heritage estates — Current skills shortages – bricklayers, plasterers	— An ageing population in the regions — The attractiveness of the industry to employees, especially males — The ageing of the workforce — The low employability skills for many seeking lower level positions, due to broader socio-economic disadvantage in the regions — Generally tight funding to the sector and need to embrace new technologies to improve labour efficiency — Some current skills shortages – registered nurses	— There are two primary issues facing the workforce in the disability care sector. These are: - Difficulty in Recruiting - Difficulty in Retaining	— An ageing workforce and encouraging young people to choose a career path in the industry — Large growth in demand due to online shopping, and agricultural sector expansion — Deployment of new technology is changing skill needs — Finding ways to respond to fast changing and developing supply chains — Changing the perception of workforce development — Improving the image of the industry in order to attract more workers — Current skills shortages – multi combination vehicle drivers, diesel mechanics, rail engineers, trainers and assessors, bus drivers
Significant current issues	**Moderate current issues**	**Moderate current issues**	**Moderate current issues**	**Significant current issues**

What are the region's current workforce capability and capacity issues?

Dairy	Fruit	Wine	Salmon
— A general shortage of labour at all levels — Lack of interest and/or awareness of jobs from locals — Shortage of high-caliber managers to manage farms — No coordinated approach to labour recruitment across the industry — Difficulty attracting labour to more remote regions	— Shortage of business management and supervisory skills — Challenges with recruitment and retention due to the seasonality of the work and the wages on offer — Competition for scare labour in the regions from other industries — Lack of knowledge of career pathways — The image of the industry is not attractive to employees — The access to training programs and resources in the regions — Quality of local labour is not adequate; driving a need for immigrant labour	— Attraction and retention of highly skilled labour — Providing career pathways — Ageing workforce — Yield variability and the variable demand for labour this creates — No specific viticulture training qualifications run in Tasmania — The structure of the current structure of training requires that trainees work a minimum of 20 hours per week every week does not suit industry needs	— Competition for workers amongst other industries and sectors — Industry attractiveness and appeal — Superior wages on offer in competing sectors e.g. oil and gas — A continually changing regulatory environment makes workforce planning more difficult — Flexible, cost effective and accessible training to regional areas — Reduce quality of candidates seeking roles in the industry — The remoteness of the jobs, unsociable working hours and access to accommodation — Retention of aquaculture graduates in the state — Male-orientated industry
Moderate current issues	**Significant current issues**	**Moderate current issues**	**Significant current issues**

Tourism and hospitality

Key workforce issues facing the tourism and hospitality sector centre around:

- Sourcing an adequate supply of labour
- Seasonal demand and the casual nature of the labour
- Competition from other industries and growth in demand for labour centred in Hobart
- Skills deficiencies and inadequate training options
- A past training focus on qualifications rather than skills
- Attraction of labour to the regions influenced by needs for accommodation and access to public transport
- Needing to look interstate for labour to fill higher end positions in both urban and regional locations

Current workforce issues/challenges

Labour Supply Challenges

- Tapping into new labour sources within the community
- Attracting additional workers during peak seasonal periods
- Improving the effectiveness of government employment programs for the industry
- Understanding the regional impact of projected visitor growth
- Improving the perceptions of choosing the hospitality/tourism as a career choice

The most difficult jobs to fill are Chefs, Cooks, Bakers and Pastry Cooks, Food trades assistants, Sales staff and Team leaders

Lack of Skills in the industry's workforce

- Lack of skills of employees, especially in customer service
- Training programs aren't aligned with industry needs
- Lack of specific skills to support emerging markets
- The partnerships between education and training providers and the industry need to be stronger

Attracting labour to regional areas – This is problematic when attempting to attract workers who have families because it can be difficult for spouses to find employment in the region.

Improving access to affordable accommodation – limited supply of affordable accommodation in some regional areas.

Reducing transport barriers to employment – Poor public transport services in regional areas acts as a barrier to the industry attracting workers.

Matters raised in consultations

- Massive growth in visitors, but workforce numbers and skills haven't kept pace
- Other industries competing for scarce labour; Hobart competing for labour i.e. 1,300 new beds in Hobart is 500-600 new jobs required
- Seasonality is still an issue, though better than previous years; larger employers are focussed on attraction, retention and skills
- Problem has been 15 years in the making; the industry doesn't need staff with qualifications, it needs people with skills and a decent attitude to work; too much fixation on pathways; accredited training can be too expensive for businesses
- Cert II qualification is not valued by industry; the qualification is not valuable if businesses then need to retrain the staff; issues for the regions are quite similar to other parts of Tasmania – perhaps higher seasonal fluctuations, more reliance on casuals, 'backpackers', those on tourist visas, etc.
- Regional areas seem to make do and Federal will find a way to staff its new development; access to transport is an issue in the regions
- Federal has 1,900 staff now and that will increase to over 2,000 with Mac1 coming online; 55% are female and that will probably increase to 60%. Trying to recruit and promote internally, but need to look interstate and overseas for higher end positions e.g. senior chefs, front-of-house etc.

Source: Tasmanian Tourism and Hospitality Industry Workforce Development Plan, November 2016, pg. 4-7

Building and construction

Key workforce issues facing building and construction sector centre around:

- An ageing workforce with a significant reduction over the next 10-15 years
- Growing reluctance to take on apprentices along with attracting and retaining apprentices
- The costs and structure of the training and apprenticeship model
- The industry mainly attracting males only, and completion from other industries
- Changing technologies affecting traditional building methods

Current workforce issues

- Workforce planning must start well in advance due to the aging workforce. The industry may lose 10% of the workforce by 2020 and a further 15% over the next 15-20 years
- Failing to have replacement workers will have significant implications on the ability to meet community expectations in terms of availability, quality, cost and productivity
- The age profile of the industry underscores many issues as disincentives to recruit exacerbate the winding down of business ambition prior to retirement
- The industry is highly responsive to demand which causes employment levels to fluctuate over short periods
- To access trade training you must be employed. The system currently provides for trade training beyond a certificate II level until employment is achieved
- Trade and other qualifications in the industry have long lead times with qualifications taking four years or more to attain
- There is a significant wage competition between industries for young people (e.g. call centres, hospitality, age care) and competition between apprenticeships and tertiary education
- Non-completions of apprenticeships are still a concern (14% of number in training 2014/15)
- There is a need to market employment of females both in schools and to the industry in general
- There are concerns whether the industry has skilled workers who are able to perform conservation work to maintain heritage estates

Source: Workforce Development Plan 2016-2020 Building and Construction Industry, TBCITB, pg 10-15

Matters raised in consultations

- Smaller businesses showing some reluctance to take on apprentices due to red tape, risk of workflow, ageing and risk averse business owners
- There will be mass exodus of workforce, with 40% of current supply gone in 10-15 years as Baby Boomers reach retirement
- In the long run changing technology will impact the industry - robotics, off-site construction/ pre-fabrication etc.
- Statewide and regions possess similar issues; availability of workforce may be more of a problem in regions, which can impact on cost, timeliness and quality of work
- Mobility potentially increases leakage of income from the regions; cyclical nature of the industry demands some flexibility e.g. lost 300 apprentices after the School Funding program ceased in 2013/14
- The industry responds to demand and is very mobile; the 10 year rolling average is 18,500 workers in the industry. The 18,500 comprises 4,000 Civil, 10,000 (55% trades- carpenter, plumbers, electrician, painters, plasterers, brick layers etc), and 4,500 Other (managers, finance, administration HR etc). The peaks was 22,500 in 2010 and low was 17,700 in 2013/14
- Currently at 22,300 due to many major projects: RHH, new hotels, UTas, civil roadworks in Midlands

Disability services

Key workforce issues facing the disability sector centre around:

- Recruiting of staff at all levels
- Retention of staff, mainly leaders, managers and volunteers

Current workforce issues/challenges

- There are two primary issues facing the workforce in the disability care sector. These are:
  - Difficulty in Recruiting
  - Difficulty in Retaining
- Difficulty in Recruiting - The areas that were the most difficult to recruit staff in were:
  - Leaders and managers – 60%
  - Permanent allied health staff – 50%
  - Trustees, directors and management committee members – 47%
  - Volunteers – 45%
  - Permanent direct support staff – 44%
  - Casual staff – 35%
- Difficulty in Retaining - The areas that were the most difficult to retain staff in were:
  - Volunteers – 33%
  - Leaders and managers – 27%
  - Casual staff – 21%
  - Trustees, directors and management committee members – 18%
  - Permanent allied health staff – 9%
  - Permanent direct support staff – 9%

Source: Tasmanian Disability Workforce Strategy and Action Plan, NDS, February 2016, pg 14 (Table 7)

Matters raised in consultations

- Anecdotal comments passed about quality of applicants' skills, particularly soft skills
- Government regulated price for services provided to people with a disability and uncertainty about demand for services is a constraint on employment; lower risk for employers to use casual/ part-time, but consumers prefer to build longer term relationships with care givers
- Increased loading being given to provide care in regions. Government regulated prices have no loading for staff training, whereas the Case Based funding did include a component for staff training. Employers are therefore now applying to Skills Tas to source subsidised training

Aged care

Key workforce issues facing the aged care sector centre around:

- An ageing population in the regions
- The attractiveness of the industry to employees, especially males
- The ageing of the workforce
- The low employability skills for many seeking lower level positions, due to broader socio-economic disadvantage in the regions
- Generally tight funding to the sector and need to embrace new technologies to improve labour efficiency

Current workforce issues

- The aged care sector has faced similar challenges in recent years to the challenges that the roll out of the NDIS present to the disability sector
- The aged care sector's 'Developing Tomorrow's Workforce Today – A Workforce Planning & Development Support Model Project' has been very successful and some of the same strategies could potentially be used to develop the required number of workers with appropriate skills to the disability care sector
- Regions don't appear to have any greater difficulties than urban areas: changing business models in aged care; ageing work force
- Need to change perception of aged care industry to one that is diverse and offers career paths
- Competition from other industries and small pool of candidates. ACST has done some work with Migrant Resource Centre, but no need to import labour at this stage
- No obvious supply issues. TasTAFE are doing a good job training Aged and Community Care Cert 3 level staff for carer roles. UTas equally doing a good job with nurses, though some are not ready for the job in the regions and need more hands-on time; same challenges getting nurses into metropolitan hospitals

Matters raised in consultations

- Difficulty sourcing RNs ENs, Managers, Chefs. Quality of applicants tend to look sufficient on paper but often come from difficult backgrounds (domestic violence, substance abuse), so issues are often seen with a lack of personal presentation, timeliness. Staff are often coming off a low skill base, so RTOs can't always be blamed
- Difficulty attracting RNs, and more of these are needed due to increasing acuity of residents; need to up skill from basic carer level. They need more flexibility in industrial environments to expand the role of carer. The pool of applicants of RNs is getting smaller and the quality is average
- Squeezed to deliver more with less; increased use of technology; need for quality staff with high clinical care; increased client choice, therefore need staff to have a consumer focus; increased outreach services; higher level of fully supported clients (i.e. don't have own capital) due to demographics of the region;
- Workforce is generally 40+, so ageing will be an issue; graduate nurses lack hands-on experience, and so will only recruit those who have had 6-12 months elsewhere developing their practical skills; need to draw staff from broad southern region, so have developed shift structure to suit "drive-in, drive out" model; also have access to 7 UTas owned beds over 2 houses to accommodate staff sleeping over; no quality issues as fairly strict DHHS recruitment provides adequate controls over quality
- Similar issues are felt in Ouse, New Norfolk and Tasman, but those facilities are smaller and so problems are smaller

Source: Developing Tomorrow's Workforce Today – A Workforce Planning & Development Support Model, December 2012

Transport and logistics

Key workforce issues facing the transport and logistics sector centre around:

- An ageing workforce
- Growth in demand for movement of goods
- Industry expansion driven by growing agricultural sector
- The attractiveness of the industry as a career
- The low profile of the industry as a career
- The unsociable shifts when the industry must work 24x7
- Low employability skills of prospective new entrants

Current workforce issues

- Meeting the requirements of a large growth in demand due to factors such as online shopping
- Finding ways to deal with an aging workforce and encourage young people to choose a career path in the industry
- Diversifying the workforce so as to provide advantages such as new recruitment pipelines
- Deployment of new technology
- The increased burden that compliance provides
- Finding ways to respond to fast changing and developing supply chains
- Continuation of mergers, acquisitions and consolidation of operators
- Changing the perception of workforce development so it is viewed as an investment rather that expenditure
- Finding ways to improve the image of the industry in order to attract more workers
- In Tasmania these issues make it very challenging to fill a number of job opportunities such as:
  - Multi combination vehicle drivers
  - Diesel mechanics
  - Rail engineers
  - Trainers and assessors
  - Passenger bus drivers

Matters raised in consultations

- Workforce is ageing – SRT mid-40s, TOLL mid-50s; jobs and work force are pretty tough and not attractive to many
- Ageing workforce and younger people not attracted to the industry due to lack of interest and industry profile
- High public liability costs
- Industry has a bad reputation-lack of recognition for career opportunities
- T&L is a service industry that other industries rely on; it is business to business – not business to consumer
- Doesn't advertise so less recognition leads to less interest; hard to change image
- Very blue collar; industry is growing; SRT focus is on food transport, this sector is growing as part of Food Bowl strategy; new emerging market in China, horticulture and aquaculture
- Very shallow pool of candidates; poor quality, skills, literacy, presentation; have struggled to fill Branch Manager roles at $120K
- Demand is leading to poaching of staff; SRT constantly recruiting for workers for afternoon 3-11 and night 11-7 shifts; driving and warehousing is a 24/7 industry
- Losing people to civil construction industry; staff shortage has been saved by the down turn of the forestry industry to get B-Double drivers
- There is a current acute truck driver shortage

Source: Tasmanian Transport and Logistics Industry Workforce Plan 2015-2018, August 2015, pg 1-2

Dairy

Key workforce issues facing the dairy industry centre around:

- A general shortage of labour at all levels
- Lack of interest and/or awareness of jobs from locals
- Shortage of high-caliber managers to manage farms
- No coordinated approach to labour recruitment across the industry
- Difficulty attracting labour to more remote regions

Current workforce issues

- Lack of irrigation in some key production areas
- Rising costs of key inputs – water, electricity, gas and labour
- Volatility in 'flow on cost price squeeze 'and prices on the international dairy commodity market means stakeholders and farmers hesitant to entering the industry
- Genetically Modified (GM) pasture varieties for use on dairy farms will be ready for commercialisation within the next five years. Jurisdictions able to leverage GM pasture technologies will obtain a productivity advantage over areas where farmers are prevented from using this technology.
- High debt levels and limited business and financial management skills of some producers impact on their capacity to manage volatility and respond to opportunities.
- Impact of intensive farming procedures on the environment
- High entry costs (land) and negative perceptions of dairy farming has caused a limited number of individuals/groups entering the industry and a diminished workforce available.
- Shortage of high-calibre managers able to manage farms on behalf of or in partnership with investors
- High growth rates bring financial, environmental and animal welfare risks that need to be carefully managed
- Shortage of quality trained farm management and labour
- Substitute products for dairy is emerging as a potential risk in the medium to long run. New innovative products are being released (mainly international market) which could eventually cause significant barriers for dairy operators.

Source: Food and Agriculture – Dairy, Sector Summary 2014, Department of State Growth

Matters raised in consultations

- There is not an intensive or large dairy industry in the SCS or SERDA regions aside from around 15 dairy farms, mainly in the Derwent Valley
- Generally looking to attract more people to dairy and more local staff
- There are skill shortages in the industry. Labour often comes from 'backpackers' or 457 visas, poaching from other farmers, and staff from New Zealand. More opportunities for local people if they want to look at dairy
- Support services such as agronomy, irrigation, equipment supplies and maintenance, rely on those farms from the north in order to remain viable
- Individual farmers manage their own supply of labour and being closer to a municipal centre makes the roles more attractive

Current state

Fruit

Key workforce issues facing the fruit industry centre around:

- Shortage of business management and supervisory skills
- Challenges with recruitment and retention due to the seasonality of the work and the wages on offer
- Competition for scarce labour in the regions from other industries
- Lack of knowledge of career pathways
- The image of the industry is not attractive to employees
- The access to training programs and resources in the regions
- Quality of local labour is not adequate, there is a driving need for immigrant labour

Current workforce issues

- The industry is shifting towards higher skill requirements, particularly in terms of managing, leading and innovating. Evidence suggests there there is a genuine concern by small business operators that they do not possess the necessary business management skills to help their business grow
- Worker recruitment and retention
  - The key challenges in retaining workers reported by firms in the fruit industry involve the seasonal nature of the work and the salaries/wages
  - Concern amongst industry operators that there is a need to improve the ‘image’ of the industry and increase the attractiveness/appeal of the job
- Constantly changing production requirements and market conditions e.g. ’backpacker’ tax, trade agreements, demand for exports
- Competition for labour - higher wages offered in different industries for job roles with transferable skills
- Lack of career pathways
  - School leavers contemplating a career have grown up with an industry that has hit the headlines for all the wrong reasons
  - Information about opportunities for careers in agriculture is often lacking, unfocused, or not up to date
  - Access to resources, programs and training systems seems complex and difficult

Source: Skills Needs Analysis for the Tasmanian Fruit Industry 2014, AAgriFood, pg 6, 8, 11, 12

Matters raised in consultations

- There is a critical National and Tasmanian shortage in the manager and supervisory positions between the low skilled pickers/packers and the farm owners
- The fruit industry could put on 6 Orchard Managers today and 18-20 at the supervisory levels
- The Orchard Manager job pays around $120k, plus car, plus accommodation, so should be attractive
- Illiteracy remains a common concern for many still in the industry
- Industry has not been seen as offering a career path, but after the picker and packer jobs, there a jobs at Leading Hand, Supervisor, Assistant Manager and Orchard Manager levels that can offer a career locally, nationally and overseas
- Industry prefers to use local labour as the first option, but when can't source sufficient numbers, look elsewhere
- Some challenges getting local labour resulting in needing to recruit from local migrant groups, Pacific Islander seasonal workers and ‘backpackers’ (in this order)
- Some local workers are just not adequate e.g. a local JA placed 5 local workers onto a strawberry farm and these workers didn't last three weeks

Current state

Wine

Key workforce issues facing the wine industry centre around:

- Attraction and retention of highly skilled labour
- Providing career pathways
- Ageing workforce
- Yield variability and the variable demand for labour this creates
- No specific viticulture training qualifications run in Tasmania
- The structure of the current structure of training requires that trainees work a minimum of 20 hours per week every week does not suit industry needs

Current workforce issues*

- 58% of the workforce is seasonal. The seasonal workforce is made up of 62% female and 37% male. 24% of seasonal workers are employed through an agency. Those that employ seasonal workers through an agency said they represent 47% of their seasonal workforce
- Access to water and water security (in some regional areas)
- Tasmania is a small – scale and high cost producer and most compete on the basis of quality
- Attraction and retention of highly skilled labour
- Providing career pathways
- Ageing workforce
- High freight costs (chemicals, empty bottles and other components that need to be imported)
- Yield variability associated with cool climate viticulture
- No specific viticulture training qualifications run in Tasmania
- Flexible Working Arrangements – the current structure of training requires that trainees work a minimum of 20 hours per week every week.
- This does not factor in the busy periods when employees are working longer hours, such as picking, or when there are quiet periods at the worksite, such as post vintage

**The wine industry's key contacts consider that their industry's workforce plan was comprehensive and nothing further could be added through additional consultation*

Source: Tasmanian Wine Sector Development Plan, June 2013

Current state

Salmon

Key workforce issues facing the salmon industry centre around:

- Competition for workers amongst other industries and sectors
- Industry attractiveness and appeal
- Superior wages on offer in competing sectors e.g. oil and gas
- A continually changing regulatory environment makes workforce planning more difficult
- Flexible, cost effective and accessible training to regional areas
- Reduce quality of candidates seeking roles in the industry
- The remoteness of the jobs, unsociable working hours and access to accommodation
- Retention of aquaculture graduates in the state
- Male orientated industry

Current workforce issues/ challenges

- Limited access to new farm sites in existing marine farming development areas
- Balancing industry expansion with environmental sustainability and community acceptance
- Production growth needs to be carefully planned and matched to market demand growth
- Reduction in port access or sea freight services to the mainland
- Potential biosecurity and fish health risks
- Competition for workers amongst other industries and sectors
- Workers are not tied to the industry, meaning that depending on their level of training, they can transfer to other industries i.e. oil and gas, that are higher paid
- Continuing difficulties with government frameworks and regulation aimed at ensuring long term sustainability
- As global aquaculture production increases, access to sustainable sources of fish protein and oil for feed is becoming an issue. (Leading to research and development in alternative food sources)
- Flexible, cost effective and accessible training to regional areas
- Industry attractiveness and appeal
- Workforce strength and level of training held

Matters raised in consultations

- Farming dynamics are placing uncertainty on industry relating to environmental impact. Social media and media drive the messages. The impact to the workforce has been that environmental and sustainability credentials are up, there is a declining wild catch, and the farming workforce is up
- There is a skills gap in aquaculture divers who usually have to get those staff from outside local area. The rest of the workforce can usually be sourced locally
- Staff need to be trained for relevant qualifications such as boat tickets
- The quantity of candidates has declined. Two to three years ago the construction industry contracted and there were more candidates but now that it has taken off again the pool is smaller
- The isolation of some locations and working hours can create challenges in sourcing staff
- Some areas can present challenges for employees in finding suitable accommodation
- Diversity is a challenge in the industry; it is quite male dominated
- Aquaculture graduates often leave the state immediately or after two or three years here, or move into fisheries

Source: Tasmanian Seafood Industry Workforce Plan, April 2013

KPMG

Section 4 Future state

What workforce capability and capacity is required to meet the future needs of the region?

Future state

Common drivers of future workforce capability and capacity

Common drivers of future workforce capability and capacity	Tourism and hospitality	Building and construction	Aged care, disability	Transport and logistics	Dairy	Fruit	Wine	Salmon
Growing demand for industry products and services	■	■	■	■		■	■	■
External market/ environmental factors create uncertainty in work force planning					■			■
Micro-business industry structure requires structured training	■					■	■	
Workforce planning guided by well formed industry plans and targeted programs	■	■	■	■				
Ageing workforce requires recruitment and retention focus		■	■	■		■		
Closer connection between industry needs and education/ training	■			■	■	■	■	■
Increasing part-time and casual labour likely to continue	■	■	■			■	■	
Ongoing high reliance on locally-based, regional workers	■		■		■	■		■
Seasonality of demand for labour likely to continue	■					■	■	
Potential for some industry consolidation, succession planning & overseas ownership						■		
Changing technologies is changing jobs and skills required		■		■				■
Recruitment of labour from interstate will continue to fill gaps	■	■				■		

What are the region's required workforce capability and capacity issues?

Tourism and hospitality	Building and construction	Aged care	Disability services	Transport and logistics
— The tourism and hospitality industry will experience growth driven by an additional 432,000 visitors by 2020 — The industry has very few large employers that deliver structured training and many more micro businesses that rely on RTO based training — The projected growth has driven government and industry to undertake workforce development planning to address looming challenges — Workforce supply and workforce quality issues in the regions are likely for the foreseeable future, though various industry interventions seek to minimise these challenges — New developments in the regions and competition for labour in Hobart's tourism sector will present challenges — A 6,000 increase in employees is predicted statewide, which will have a proportional impact in the SERDA and SCS regions	— Activity levels in the civil and construction industries will grow over the coming years with the improved economic conditions — The ageing of the workforce will lead to labour supply issues — Apprenticeship numbers have grown but are not back to the 2010 peak, creating new labour supply issues — Traditional apprenticeship models are becoming less attractive to the ageing industry and may affect labour demand and supply — Changing technologies and work safety focus will drive industry reforms — The low attraction of females constrains the potential supply of labour by 50% — High labour mobility in the industry, including attraction of labour from interstate will help to mitigate future workforce risks	— The ageing of the Tasmanian population means that more employees will be required in aged care into the future — The aged care sector has developed its own multiple strategies and programs to respond to increasing demand — A trend to ageing at home with support packages will require labour to be more mobile into the future — Care and support roles are often filled by regionally based staff, which appears to be limiting pressure for sourcing labour into the sector — Structured pathways are in place to bring nurses into the industry, though there is competition from other medical careers that may be more attractive — Motivations of millennials are likely to favour employment in this sector	— The roll-out of the NDIS in Tasmania will be fully operational by July 2019 — The implementation will mean that more disability workers will be required in regional areas — The sector has been working on a number of initiatives to attract labour — The sector is yet to significantly progress its first workforce development plan — The growth in demand for services may be in proportion to current demand in the regions, though regional level demand data is not available — Around 60% of the future workforce will be part time/ casual which may suit workers raising families, and be better suited to females	— The Tasmanian workforce in this sector is ageing — Passenger movements and freight volumes are expected to continue to increase, driven by factors including demand for Tasmanian food in China — Changing technologies may reduce jobs in the longer term — Jobs in local major employers in transport and logistics are likely to grow in line with past growth trends
Significant future issues	**Moderate future issues**	**Moderate future issues**	**Moderate future issues**	**Significant future issues**

Future state

What are the region's current workforce capability and capacity issues?

Dairy	Fruit	Wine	Salmon
— Tasmania remains a key player in the national dairy industry as the third largest producer of milk at almost 10% of the nation's milk output — Despite the growth in demand, price volatility can lead to dramatic shits in demand, producer profitability and demand for labour — Total labour demand for the industry has not changed and this may continue in the foreseeable future — The profile of the industry and its seasonal nature will remain an issue	— The growth in production expected by the fruit industry is likely to drive an increase in demand for skills and labour — The industry and larger businesses within the industry are seeking more managerial-type roles and leadership positions. — Demand for foreign labour to cover 50% of labour requirements will continue — Growth is likely to be significantly driven by investment from Chinese and Japanese interests — Quality requirements will drive ongoing investment in people and processes; mechanisation may reduce demand for labour — The TasAgJobs portal is a key initiative to link job hunters with vacancies	— The strong growth in demand for Tasmanian wine is expected to continue, driven by product quality and a warming climate — The strong reputation of Tasmanian wine has led to an increase in investment over the past years and is expected to continue to attract new entrants — The high dependence on a season workforce (up to almost 60%) is likely to continue — Growth in winery tourism may drive demand for additional labour to work on cellar-doors, all year round	— The Tasmanian salmon industry's competitive advantages are expected to remain for the foreseeable future — Demand for labour is expected to continue to increase driven by ongoing expansion of the industry — Government support for the industry remains strong though environmental standards will always need to be met — There is likely to be immediate demand for 70 new jobs in the region — It is hoped that many will be sourced from the regional communities
Moderate future issues	Significant future issues	Significant future issues	Significant future issues

Tourism and hospitality

Sector Forces/Trends

- Tasmanian tourism and hospitality is experiencing significant expansion and diversification
- The industry is experiencing sustained growth and record numbers of visitors and record spending
  - There were 1.15 million visitors to Tasmania in 2014-15 which was an 8 percent increase on the previous year
- These trends for high growth are projected to continue
  - It is estimated that visitor numbers could increase by an additional 432,000 by the year 2020
- Tourism in Tasmania directly and indirectly contributes around $2.55 billion or 9.9% to Gross State Product with a direct contribution of $1.17 billion (around 4.6%) and an indirect contribution of a further $1.38 billion (around 5.3%)
- Tasmania's tourism industry is made up of around 2100 separate businesses and directly and indirectly supports around 36 700 jobs in Tasmania or about 15.3% of total Tasmanian employment
- Given the importance of the tourism/hospitality industry to the growth of Tasmania's economy there has been and still is a close working relationship between these industries and the Tasmanian Government.

Sources: Tasmanian Tourism and Hospitality Industry Workforce Development Plan, November 2016, pg ii and http://www.tourismtasmania.com.au/about

- The tourism and hospitality industry will experience growth driven by an additional 432,000 visitors by 2020
- The industry has very few large employers that deliver structured training and many more micro businesses that rely on RTO based training
- The projected growth has driven government and industry to undertake workforce development planning to address looming challenges

Matters raised in consultation

- Both quality and quantity issues will be significant now and into the future based on T21 growth projections
- Tourism will increase in the south east with new developments coming on line in Port Arthur and Triabunna
- Skills not adequate for some small operators; regional operators have trouble attracting labour e.g 1000 Lakes Lodge
- Access to transport is an issue on the east coast;
- Expansion of Hobart accommodation (1,500 rooms over next 3 years) will draw labour to the city
- Tourism still not seen as a career - just a series of casual jobs
- Employees in the industry will need to increase from 22,000 now to 28-30,000 by 2020

- Workforce supply and workforce quality issues in the regions are likely for the foreseeable future, though various industry interventions seek to minimise these challenges
- New developments in the regions and competition for labour in Hobart's tourism sector will present challenges
- A 6,000 increase in employees is predicted statewide, which will have a proportional impact in the SERDA and SCS regions

Building and construction

Sector Forces/Trends

- The building and construction industry provides 10% of Tasmania's fulltime workforce. It provides the essential infrastructure that other industries need
- As at August 2016 the industry has currently employed 18,600 which equates to an 18% increase in comparison to August 2014
- Of the 18,600, it is predicted that 4,100 people will make up the civil construction workforce
- Activity levels within the industry are expected to improve in the next two years. This is evidenced with an expected growth in turnover from $2.38 billion in 2014/15 to $2.45 billion in 2016/17 and $2.38B in 2017/18
- The industry employed 1,195 apprentices in 2014/15 which is a 6% increase from the previous year. However, this figure is still below the highs of 2010
- Whilst work safety is improving, it remains a key focus for the industry as 7% of the states lost time injuries relates to construction and building
- The industry has variation in qualification levels. ABS data indicates that licensed trades have high qualification rates whilst finishing trades have low level
- The workforce is predominantly male with 88% of employment being male nationwide. 98% of apprentices in Tasmania are male (94% nationwide)
- Technology has advanced in the industry through Building Information Modelling which help with designing, creating and maintaining assets. Off-site construction is also growing within the industry with modular designs

Source: Workforce Development Plan 2016-2020 Building and Construction Industry, TBCITB, pg 7,8,15,30

- Activity levels in the civil and construction industres will grow over the coming years with the improved economic conditions
- Apprenticeship numbers have grown but are not back to the 2010 peak, creating new labour supply issues
- Changing technologies and work safety focus will drive industry reforms

Matters raised in consultation

- The workforce is generally ageing e.g. of the 62 registered building surveyors, 2/3 are older than 50
- It has generally been a long lead time of 4 years to complete an apprenticeship. There is some movement towards a competency based approach to reduce the timeline
- There is no regional level data on demand and supply (18,500), but this is being looked into
- The replacement rate for apprentices requires 150 carpenters per year; 600 - 30% - over the 4 years of an apprenticeship and 15% of the existing workforce in other trades; current supply is adequate across all the trades
- There may be shortages because of industry tendency to only employ males i.e. of the 20,000 of year 10 students in Tasmania roughly 50% are boys and 50% are girls, leaving 10,000 prospective apprentices, 3,500 do TCE leaving 6,500 prospects, but competition will come from other industries
- General outlook in short-to medium term is strong due to signs of population growth, tourism growth, some regional tourism initiatives; building and construction is a more mature industry perhaps compared to hospitality
- Still some room for growth in labour supply and improved skills. Some reports of low employability skills pre-apprenticeship
- High labour mobility in the industry, including attraction of labour from interstate will help to mitigate future workforce risks

- The ageing of the workforce will lead to labour supply issues
- Traditional apprenticeship models are becoming less attractive to the ageing industry and may affect labour demand and supply
- The low attraction of females constrains potential supply by 50%
- High labour mobility in the industry, including attraction of labour from interstate will help to mitigate future workforce risks

Aged care services

Sector Forces/Trends

- Tasmania has an aging population meaning that more employees will be required in aged care in the future
  - In June 2011 the median age for the Tasmanian population was 40.4 years
  - Since 2001 Tasmania has overtaken South Australia to have the oldest median age of any state or territory
  - Over that 10 year period Tasmania also had the highest increase in the median age of 3.2 years
  - The East Coast had the highest median age. The three areas with the highest median age were Tiabunna-Bicheno (52.8 years), Forestier-Tasman (50.6 years), St Helens-Scamander (49.8)
- From 2001-11 the percentage of the population aged over 65 increased from 13.8% to 16.1%
- The aged care sector implemented a plan called 'Developing Tomorrow's Workforce Today – A Workforce Planning & Development Support Model Project'. This plan was implemented to work towards achieving outcomes that are associated with 5 key actions - Workforce planning, Brokerage (Workforce Planning and Development Support Service) Service, Capability and capacity building, Learning and Development Networks, and Skilling and developing our workforce
- The project has made the aged care service sector in Tasmania more aware the workforce demographics now and into the future and the skills and requirements associated with the workforce.

Source: Developing Tomorrow's Workforce Today – A Workforce Planning & Development Support Model, December 2012

- The ageing of the Tasmanian population means that more employees will be required in aged care into the future
- The aged care sector has developed its own multiple strategies and programs to respond to increasing demand
- A trend to ageing at home with support packages will require labour to be more mobile into the future

Matters raised in consultation

- Labour tends to be attracted from local or neighbouring regions; more local = more reliable
- 30 - 40 new graduate nurses will start in the sector each year; mainly targeting young people; aged care sector is the second highest employer of nurses only behind the THS
- 40% of workforce in by 2020 will be 'millennials' - want flexible work, not a career for life, more motivated by non-monetary drivers
- ACST has been very active in supporting sector; actions in 2011 sector plan have all be completed and surpassed. A new sector workforce development action plan has been prepared (not Skills Tas funded and not on their website)
- Employment information sessions have been run by ACST- 300 applicants reduced to 100 stronger candidates. Employment Hub is operational - a web-based portal accessible to employers and employees to match demand with supply - 6 years to develop to this stage; many other specific programs e.g. Joining the Dots linked RTOs with JAs; New Direction Program provides on the job learning; Industry Awareness Days
- Key employers in the region have indicated:
  - Master Plan aims to expand by 9 beds from current 107 - this would not have a major impact on staff. ILU expansion may increase demand for home care
  - Aiming to business grow by almost 50% over next 3-5 years, up to 250 staff

- Care and support roles are often filled by regionally based staff, which appears to be limiting pressure for sourcing labour into the sector
- Structured pathways are in place to bring nurses into the industry, though there is completion from other medical careers that may be more attractive
- Motivations of 'millenials' are likely to favour employment in this sector

*http://www.abs.gov.au/ausstats/abs@.nsf/Products/3235.0~2011~Main+Features~Tasmania?OpenDocument

Future state

Disability services

Sector Forces/Trends

- The state is currently rolling out the national disability insurance scheme (NDIS) with it expected to be fully operational by July 2019
  - The NDIS is being progressively rolled out in age group brackets
  - When the scheme is fully implemented it is expected to cover over 10,500 Tasmanian's with disability - https://ndis.gov.au/about-us/our-sites/TAS.html
- The NDIS is intended to help people who have a permanent and significant disability that means they need assistance with every day activities
- Once a person receives support under the NDIS they may either maintain their current support arrangements or change to new ones so long as they are allowed under the NDIS legislation
- The implementation of the NDIS around the whole of the state will mean that more disability workers will be required in regional areas
- The implementation of the NDIS is predicted to provide good employment opportunities for Tasmania
- There are 216 agencies registered to provide services under the NDIS. These include providers such as taxi services, local governments and fitness centres

Sources: https://ndis.gov.au/about-us/our-sites/TAS.html
Tasmanian Disability Workforce Strategy and Action Plan, February 2016

- The roll-out of the NDIS in Tasmania will be fully operational by July 2019
- The implementation will mean that more disability workers will be required in regional areas
- The sector has been working on a number of initiatives to attract labour

Matters raised in consultations

- None of the regional-specific actions in the Sector Plan have been systematically progressed at this stage. Plan will be updated in February 2017 after first year
- General growth in demand but it is patchy depending on the region/location of consumers
- Apart from ABS, no data is available on location of people with disability by region, but would expect to be broadly in line with distribution of population more generally
- The NDIS Market Position Statement for Tasmania estimates an increase in employment that comprises 40% part-time, 40% casual and 20% full-time
- The increasing reliance on part-time and casual jobs in the industry is likely to suit older working parents, who are also raising families
- The sector is likely to continue to attract a higher percentage of female workers
- NDIA is undertaking more market demand and labour supply analysis - Speak to Chris Oppert at NDIS and look at Market Position Statement for Tasmania on NDIS website;

- The sector is yet to significantly progress its first workforce development plan
- The growth in demand for services may be in proportion to current demand in the regions, though regional level demand data is not available
- Around 60% of the future workforce will be part time/ casual which may suit workers raising families, and better suited to females

Transport and logistics

Sector Forces/Trends

— Tasmania has a large transport industry, consisting of 1,356 businesses and 12,800 people.

— From June 2013 to June 2014 the transport, postal and warehousing sector contributed over $1.5 billion to gross state product (6.1%)

— As a general trend, the Tasmanian workforce in this sector is ageing.

— Freight volumes have nearly tripled over the past three decades

— Passenger movements through airports have more than quadrupled in the same time

— In recent years the demand for movement of freight and people has grown. This change has also caused the size of vehicles, ships and planes to increase

— Technology is beginning to be developed that allows autonomous driverless transport systems which may deter some from entering the industry

— Nanotechnology may also play a role in achieving real-time control of the supply chain. The sophisticated tracking devices can record temperature and condition of goods throughout the entire logistics chain

— Transport companies are looking to reduce their energy consumption and the associated costs

— Large opportunities for growth are expected with the continued expansion of Asian countries that rely on Australia for food supply

— The growth in online shopping has had a negative impact on transport businesses that service traditional shops

Source: Tasmanian Transport & Logistics Industry Workforce Plan 2015 – 2018, August 2015, pg 1, 7, 39

— The Tasmanian workforce in this sector is ageing

— Passenger movements and freight volumes are expected to continue to increase, driven by factors including demand for Tasmanian food in China

— Changing technologies may reduce jobs in the longer term

Matters raised in consultation

— Fairly steady growth but nothing outside normal trend

— Workforce is ageing and the industry is would appear to be not attractive to current generations that will fill the jobs of the future

— This sector is growing as part of Food Bowl strategy

— New emerging market in China, horticulture and aquaculture will be facilitated by airport expansion

— Statewide SRT aims to grow from 215 to 320 staff; there are 115 in Brighton and this will grow in proportion

— Jobs in local major employers in transport and logistics are likely to grow in line with past growth trends

http://www.skills.tas.gov.au/__data/assets/pdf_file/0008/123794/Tasmanian_Transport_and_Logistics_Industry_Workforce_Plan_2015-2018.pdf

Dairy

Sector Forces/Trends

- Tasmania's milk production costs are consistently lower than most other Australian dairy regions, resulting in higher returns on capital invested. This has driven the industry growth over the last two decades.
- Tasmania is the third largest dairy producer, accounting for 8.3% of the nation's milk output. In the ten years to 2011-12, Tasmanian milk production grew by around 22%
- National trend towards fewer but larger farms. With the largest average herd size in the country at 367 (2014)
- Economic growth and changing diets in China and other emerging economies saw global dairy exports grow from eight million to 11 million tonnes per annum between 2000 and 2012
- The dairy sector is growing in response to increasing international and domestic market demand, but producers (farmers), particularly those that are highly geared, must be able to manage the price volatility on the international dairy commodity market
- 5 to 10% of dairy farm operators are on the market to sell
- The Tasmanian dairy industry continues to have small training culture and is not a significant user of formal, structured tertiary or vocational training. Statistics point out that there has in fact been a reduction in the take up of accredited training by dairy farmers over the period between 2002 and 2006.
- A climatically favourable season in 2013/2014 saw milk prices reach a near record high with industry experts expecting it to continue into the medium term, though price volatility remains a risk

Source: Food and Agriculture – Dairy, Sector Summary 2014, Department of State Growth

- Tasmania remains a key player in the national dairy industry as the third largest producer of milk at almost 10% of the nation's milk output
- Despite the growth in demand, price volatility can lead to dramatic shits in demand, producer profitability and demand for labour

Matters raised in consultations

- The labour force needs for dairy in Tasmania have not changed significantly in recent years
- There is not a high profile for Dairy Industry careers
- The seasonal nature of the work can be an issue
- The Agriskills Program run by TFGA is looking at what can be done for agriculture in terms of skill development

- Total labour demand for the industry has not changed and this may continue in the foreseeable future
- The profile of the industry and its seasonal nature will remain an issue

Future state

Fruit

Sector Forces/Trends

- The growth in production expected by the fruit industry is likely to drive an increase in demand for skills and labour. Due to the fact that skilled labour was flagged as a key challenge and not the availability of labour more generally, this indicates that the level of skilled workers will be a key determinant in the industries growth expectations. Tasmania is becoming one of the highest cost producers in the world, having a significant effect on labour costs
- Over the last five years, evidence suggests that the industry and larger businesses within the industry are seeking more managerial type roles and leadership positions. Larger businesses indicate a greater need for occupational related licenses and qualifications (skilled labour)
- The percentage of foreign workers within the industry still accounts for nearly half of the workforce (46% in 2011). Employment of 'backpackers' and the taxation requirements has been an ongoing topic of discussion over the last five years. The industry reliance and growing demand for backpackers for its seasonal workforce, means that any changes in visa arrangements and tax legislation can cause confusion. The 15% flat rate backpackers tax effective 1 Jan 2017
- The increased expectation for a greater demand in the fruit industry workforce has meant that there will be a bigger push for an effective collaboration between industry, training systems and the government
- There is greater use of social media and labour hire/recruitment companies for recruitment of seasonal staff in the berry and summer stone fruit sectors
- Growth expectations were strongest with large fruit businesses and especially those strongest for those businesses involved with cherries or berries. Growth expectations were strongest in the northern and southern regions

Source: Skills Needs Analysis for the Tasmanian Fruit Industry 2014, AgriFood

- The growth in production expected by the fruit industry is likely to drive an increase in demand for skills and labour
- The industry and larger businesses within the industry are seeking more managerial type roles and leadership positions
- Demand for foreign labour to cover 50% of labour requirements will continue

Matters raised in consultation

- There has been a significant expansion of Chinese and Japanese owned farms in the regions e.g. in the Coal River Valley, Coal Valley Orchards and Red Knight are growing cherries, apples, stone fruit and in the Derwent Valley, Styx River Cherries, Wandin Valley; there is also a new 290HA farm near Bagdad, with 10HA already planted in cherries for export to China
- Increasingly high focus on quality assurance to meet very rigid trade requirements covered in bilateral agreements
- Integrated pest management is increasing to use more natural methods to manage disease and pests, which could drive additional demand for labour
- There is growing mechanisation in the industry - packing machines, robotic harvesting etc. which is and may continue to reduce demand for workers
- FGT completed a Skills Needs analysis in 2014; work will soon commence on a sector workforce development plan
- Currently FGT with support from other industries (i.e. Dairy Tas, Wine Tas, RDA Tas and the SCS Councils) have developed the TasAgJobs portal that allows employers to post vacancies and allows job seekers to apply for jobs; the portal will be expanded to also include training opportunities

- Growth is likely to be significantly driven by investment from Chinese and Japanese interests
- Quality requirements will drive ongoing investment in people and processes; mechanization may reduce demand for labour
- The TasAgJobs portal is a key initiative to link job hunters with vacancies

http://www.northqueenslandregister.com.au/story/4406716/administering-the-new-backpacker-tax/

Future state

Wine

Sector Forces/Trends

— The growing recognition of Tasmania's wine through independent wine shows, public events and various awards, has seen the demand for Tasmanian wines 'outstrip' supply and prices for both grapes and wine amongst the highest in Australia

— Value of Tasmanian wine sales is growing at an estimated rate of 11.1% per year

— The strong reputation of Tasmanian wine has led to an increase in investment over the past years and is expected to continue to attract new entrants

— Global recognition of the quality of Tasmanian wines has continued to provide economic growth for the industry, with net investments in the industry rising

— The value per litre of Tasmanian wine exported is almost four times the national average, and Tasmanian wines represent 6% of Australia's overall premium wine sales

— Over the last five years to 2013, average annual production in Tasmania has been approximately 8000 tonnes of grapes. With an average purchase price per tonne of $2,393

— Tasmanian wine industry has however a continued dependence on a seasonal workforce. With 58% (2013) of workers being seasonal

— Given the impact of climate change, some areas of mainland Australia may be unsuitable for wine grape production in the future. Growing global demand for cool climate wine styles (Tasmanian wines), and that of climate change may provide greater growth in demand for Tasmanian wine products.

— Push towards attracting winery visitation and building winery tourism in Tasmania By the end of 2015-16, the industry expects the Tasmanian grape-bearing area to increase from 1538 hectares in 2013, to 2000-2500 ha.

— The top three job groups employed that are expected to increase are: 1. Vineyard worker (40%), 2. Cellar door (27%), 3. Cellar hand (13%)

— The top three job groups employed that are expected to stay the same are: 1. Vineyard Manager/Leading Hand (46%), 2. Viticulturist (43%), 3. Vineyard worker (39%)

— The top three job groups employed that are likely to decrease are: 1. Vineyard worker (9%), 2. Viticulturist (6%), 3. Vineyard manager/leading hand – cellar door – laboratory staff – other (information not supplied) (4%)

Sources: Tasmanian Wine Sector Development Plan, June 2013
Food and Agriculture – wine Sector Summary 2014, Department of State Growth

— The strong growth in demand for Tasmanian wines is expected to continue, driven by product quality and a warming climate

— The strong reputation of Tasmanian wine has led to an increase in investment over the past years and is expected to continue to attract new entrants

— The high dependence on a season workforce (up to almost 60%) is likely to continue

— Growth in winery tourism may drive demand for additional labour to work on cellar-doors, all year round

Section 5 Strategies and actions

What workforce development activities are needed to address the workforce capability and capacity gap?

Summary of initiatives

The study has identified a range of workforce development activities that can be pursued to help to address the workforce capability and capacity gaps that have been found. Those that have been identified in Section 2 are summarised in the Table below

THEME #1: TRAINING AND EDUCATION INVESTMENT AND REFORM		
#	**Workforce development initiatives**	**Rationale**
1.1	**Strengthen education and industry links/ align training to industry needs**	*Some courses have not equipped students to be job ready due to the structure and content of the course or the methods and quality of delivery. Education and skills training has not necessarily aligned with industry needs. The co-design of both Certificate level courses, courses that deliver Statements of Attainment and other short courses need to match job requirements*
1.2	**Ensure a responsive and contemporary TasTAFE that meets industry needs**	*TasTAFE is the single largest player in vocational education and training. Its performance has attracted mixed reviews and notwithstanding the gains now being made, there would appear to be further upside. TasTAFE's Education Architecture Project should better inform its service delivery model going forward*
1.3	**Improve delivery of training to regional communities to develop their workforces**	*TasTAFE and the smaller RTOs have scope to continue expand the delivery of course in regional communities. Issues associated with the cost of training and smaller class sizes should not be impediments to the provision of training in region. Structural and funding limitations that inhibit dual enrolment (which allows student and adult learners to both enroll in the same course to optimise attendance numbers) need to be addressed*
1.4	**Continuing to develop better linkages between education and employment through school-based apprenticeships**	*School based apprenticeships require students to complete TCE while concurrently gaining on-the-job skills through placement with employers. This form of education and training is gathering momentum and would appear to have particular application to the skills needed in the growth industries of the regions*
1.5	**Continue to roll-out various other initiatives that improve pre-employment and employability skills**	*Low employability skills for too many candidates has been reported. Prospective workers still at school that come from disadvantaged backgrounds and longer term unemployed need further support to develop basic skills that would allow them to be considered by prospective employers e.g. Beacon Foundation and Your Town funded programs*
1.6	**The Trade Training Centres can play an even greater roll as the hub for regional skill development**	*The Trade Training Centre had been dormant for some years before being structurally aligned and settled in DoE. Momentum in these centres is now building, with the Huon being held out as an exemplar, which is now being followed by Bridgewater and Sorell. Given their positioning in the regions and their abundance of space on which to expand, these can play an even greater role going forward as the hub of trade training for industries operating in the regions*

Summary of initiatives

The study has identified a range of workforce development activities that can be pursued to help to address the workforce capability and capacity gaps that have been found. Those that have been identified in the various sector workforce development plans and through our consultations, which are more common to all industries in the region are summarised in the table below.

THEME #2: PROMOTE PATHWAYS INTO SKILLED EMPLOYMENT		
#	**Workforce development initiatives**	**Rationale**
2.1	**Promote each industry as a career in a competitive market for labour**	*Many industries are not seen as offering a career. Rather some industries are seen as offering 'stop-gap' employment while waiting or being educated for other jobs. There are many industries with significant levels of lower-middle management that offer a genuine career path between the owner/ operator and the entry level/ low skilled jobs*
2.2	**Develop career maps/ portals to match employee and industry needs**	*Career maps and electronic portals can more easily connect prospective employees with employers. Hubs such as these have recently been developed and are now being used in the aged care and agricultural sectors.*
2.3	**Tap into new sources of labour, increase recruitment entry points**	*There are significant reserves of unemployed or under employed labour in the regions which could be available to industries in need of workers now and into the future. This labour needs to be motivated and mobilised in order to meet the labour needs of regionally based employers*
2.4	**Undertake and implement industry based workforce planning**	*Many of the industries that have been within the scope of this study have prepared workforce development plans. The execution of actions in these plans appears to have been variable. A key to the success of sector based workforce planning is establishing effective governance arrangements to drive the implementation of the plans*
2.5	**Develop/ improve training and retention culture in the industry**	*Some industries / employers have not embraced training as legitimate investment. Training and development needs to be regarded as a mechanism to attract, retain and develop workforces rather than an unproductive overhead.*

Summary of initiatives

The study has identified a range of workforce development activities that can be pursued to help to address the workforce capability and capacity gaps that have been found. Those that have been identified in the various sector workforce development plans and through our consultations, which are more common to all industries in the region are summarised in the table below.

THEME #3: IDENTIFY BEST PRACTICE BUSINESS MODELS TO ADAPT TO WORKFORCE CHANGES		
#	Workforce development initiatives	Rationale
3.1	**Investigate impediments and options for the JA model to more effectively meet the needs of industry**	*JAs tend to provide job support services for longer term unemployed in regions who may come from disadvantaged backgrounds and do not have adequate employability skills. The funding model that drives the JAs appears to not suit the needs of industry and incentives offered to take on employees are not attractive to industry*
3.2	**Improve access to accommodation and transport services to support training and employment in the regions**	*Accommodation and public transport for workers in regional communities remains a challenge and deterrent to attracting and retaining labour. Examples of employers securing land and constructing accommodation for workers have been found that are illustrative of approaches that industries/ employers may need to adopt*
3.3	**Build innovative business models and entrepreneurial approaches to meeting regional employment requirements**	*Non-traditional models of sourcing, connecting, managing and deploying labour in remote regions with disparate industries may be required outside of more traditional recruitment models within an industry. Innovative labour hire models and regional 'job hub' models (such as Huon Works) may provide inspiration for adopting new approaches to regional employment and development. The feasibility of this model being replicated in other regions should be investigated*
3.4	**Adopt more flexible working arrangements to address seasonality of employment considerations**	*Seasonal demand for workers varies across industries, which creates periods of over supply and under supply of labour. Greater cooperation across industries in regions could smooth out peaks and troughs in demand for labour*
3.5	**Develop the roll of the councils in the regions as facilitators of regional and workforce development**	*The regional councils are leaders and key players in regional development. Councils are also significant employers of labour in the regions in their own right. There would appear to scope for councils to take on greater roles in advocating, activating and facilitating connection between education and industry in the regions as part of their broader regional development mandate*

Implementation framework

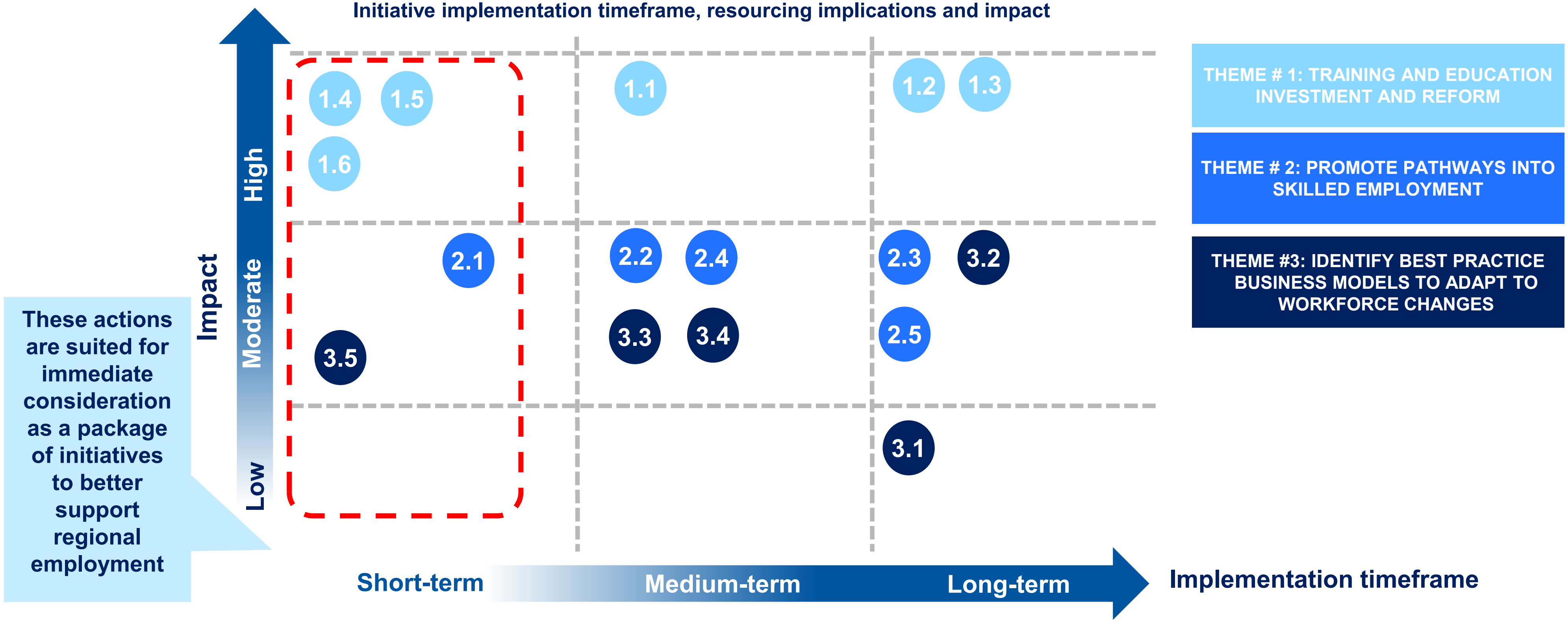
The proposed workforce development initiatives are presented below with a high-level assessment of impact and timeframe. This assessment identifies initiatives that can potentially be implemented (or expanded/ promoted) immediately with less complexity compared to those that would appear to be more complex due to the nature of the stakeholders, systems and process that would require reform. Three categories have been used in relation to implementation time frames:

— Short-term: implementable in the next 6-12 months;

— Medium-term: implementable in the next 2-3 years; and

— Long-term: implementable in 3+ years.

Initiative implementation timeframe, resourcing implications and impact



Strategies and actions

Industry workforce development plan common strategies

Strategy	Tourism and hospitality	Aged care, disability	Building and construction	Transport and logistics	Dairy	Fruit	Wine
1. Promote the industry as a career in a competitive market for labour							
2. Develop a career map/ portal to match employee and industry needs							
3. Tap into new sources of labour, increase recruitment entry points							
4. Strengthen education and industry links/ align training to industry needs							
5. Develop/ improve training culture in the industry							
6. Undertake and implement industry based workforce planning							
7. Improve quality of training courses/ encourage high quality providers							
8. Ensure a responsive and contemporary TasTAFE meets industry needs							
9. Improve delivery of training to regional communities to develop workforces							
10. Improve access to accommodation and transport							
11. Build business capability, management skills, entrepreneurial spirit and adaptation							
12. Adopt more flexible working arrangements/ seasonality considerations							

Tourism and hospitality

Challenges include:

- Access to child care for older people
- Sourcing career advice tailored to student needs and preference
- Attracting new workers to the industry who are job ready
- The structure of VET training in this industry and the low completion rates
- The business and funding models of the Job Active Network may not deliver appropriately skilled candidates to the sector

Opportunities include:

- Ongoing roll-out of targeted industry awareness and recruitment programs
- Expansion of school based apprenticeships and training structured to better meet industry needs
- Establish Sorell as a COE for tourism industry training

Systemic challenges

- Childcare may be an issue affecting older people wishing to enter the industry
- Years 8-10 are only teaching traditional subjects with nothing tailored for the industries in the regions; need improved career pathway planning; public transport also a problem in the regions
- MyEducation has been slow to ramp up and gain acceptance
- TasTAFE receives $8.5M of funding to provide training to 87% of students entering the industry. Total training pool is around $10-11M. Drysdale is no longer providing high-end training. TasTAFE unresponsive and too diversified, and has lower reputation by the industry as students are not job ready
- Main RTOs are IndustryLink, Outside the Square and MEGT and TasTAFE; Cert II is not valued by the industry; 50% drop out rate from RTOs
- Some difficulties facing Job Actives e.g. MAX Employment tried to place "12 unemployables"; employers don't trust the Job Actives because of their funding models- are paid to place/ complete kids who aren't job ready and are paid more if kids have Cert III; employers not attracted by offers of bonus payment to take difficult kids
- UTas has no significant relevance to the sector. An Associate Degree may assist if it gets up and running

Opportunities

- Need shorter and sharper skills based courses e.g. AHA has supported 1-2 hour video based training for 1-2 hours per day, that can be based at the venue; also should focus on school based apprenticeships for students from year 10 onwards involving 1-2 days per week in the venue and 3-4 days per week at school-complete year 12 as a 2 year apprentice – attach students to a venue; design curriculum to Cert III and IV
- Make Sorell the Centre of Excellence for tourism related skills training - High School, Trade training etc. See Byron Bay model; use the DAPs to drive change in the regions, change education focus in the regions to be more industry focussed; offer traineeships with experiences that can be gained from multiple employers with different star ratings
- Councils have a role in implementation of the Destination Action Plans (DAPs); focus is on innovation and infrastructure, but there are actions around improving the visitor experience, which can be the connection to improved training etc; also support award programs e.g. Southern Stars (last year only 1 council nominated); councils can also play role through their economic development bodies e.g. DVC
- Various workforce development initiatives have been put in place e.g. Career Start, Ambassador Program; The "Ambassador Fleet" involves 23-24 year old industry representatives speaking to school groups at primary and secondary levels; also working with Beacon Foundation and White Lion in schools targeting disengaged youth; Break O'Day and State Growth are working on a concept to develop a not-for-profit labour hire model across industries; need more cooperation between industries in a region to taking advantage of seasonality

Building and construction

Challenges include:

- Tailored career advice to prospective workers
- A systemic shift away from the traditional apprenticeship models
- An effective training monopoly for TasTAFE
- Trade Training Centres are still coming up to speed

Opportunities include:

- Implementation of the TBCITB's new Workforce Development Plan
- Ongoing training by building associations to their members
- Pre-employment training to improve employability skills
- Extension of labour hire models, subject to the pilot being successful

Systemic challenges

- Loss of Career Pathway planners in state system has not been good for the industry
- The days of every builder having an apprentice are gone
- TasTAFE has a virtual monopoly but are doing a good job. A small number of RTO deliver more specialist training for higher risk activities
- UTas doesn't offer building qualifications. Tasmanian students seeking a tertiary qualification go through University of Newcastle. UTas does offer higher level courses in engineering and architecture, which form part of the industry more generally
- Trade Training Centres could do more in pre-employment programs to improve the quality/ awareness of year 11/12 students considering apprenticeships

Strengths and opportunities

- The Tasmanian Building & Construction Industry Training Board (TBCITB) recognises that maintaining a well trained core workforce is in the public interest and fundamental to the development plans of others. The Workforce Development Plan 2016 – 2020 aims to achieve this goal
- HIA, MBA, TIBA all deliver training to their members supported by TBCITB funding, which is thought to be effective
- Currently negotiating the Youth Build Program - an agreement between the HI, Claremont College and four feeder high schools- to encourage students to undertake pre-employment courses before leaving years 11/12 - funded by DOE, HIA, TBCITB and Claremont College, integrates Cert II with other pre-employment and soft skills development; Skills Tas is funding a work-readiness pilot program targeting longer term unemployed and disadvantaged people
- A clear, long term Infrastructure Plan for Tasmania would assist the industry to plan for future work flow
- Some signs of employment innovation could be extended to involve councils e.g. TIBA has involvement in model where Work and Training (Group Training organisation) pays students wages, does paperwork etc and bills the business for access to the labour- this model has attracted 10 apprentices, increasing to 20 soon. It provides a model where groups of SMEs can share an apprentice and councils could take on the TIBA role

Aged care

Challenges include:

- Public transport in regional areas
- Career advice in secondary schools

Opportunities include:

- Building on relationships with RTOs and JobActives to improve employability skills
- Portability of skills between human service and other service industries such as tourism
- Career expos where they are well coordinated

Systemic challenges

- Much harder to deal with the schools and secondary colleges without the Career Advisor roles; schools sometimes want involvement in school career expos but there are too many to support all
- Public transport is a big issue in the regions, that cuts across all links in the chain

Strengths and opportunities

- Aged care sector has good relationships with JobActives and RTOs – see Aged Services Innovation Network as an example of multi-party collaboration
- RTOs weren't reliable 6 years ago but are much better now; there are 10 good RTOs servicing the aged care sector
- Working with RTOs to improve quality in basis employability skills; Cert II I Health Support Services can cover catering, cleaning, maintenance in order to attract new entrants
- Scope for sharing labour between industries e.g. catering staff can also work in tourism and hospitality; many programs e.g. Hub, Reverse marketing and Industry Awareness programs have been successful
- Career expos have worked well, but don't occur anymore - these could recommence in the regions if the cost/ benefit makes sense; sector has not engaged with councils and its hard to see a role for councils, though understand regional development role

Disability services

Challenges include:

- Generic training not sufficiently tailored or hands-on
- Public transport in regional areas
- Career advice in secondary schools

Opportunities include:

- Building on relationships with RTOs and JobActives to improve employability skills
- Portability of skills between human service and other service industries such as tourism
- Strategic relationships between micro-regional businesses and more significant industry players

Systemic challenges

- Cert III Individual Support (covers aged, disability, health etc.) has been too "off the shelf" and not providing sufficient hands-on at early stages of employment
- Industry will need more allied health employees, but UTas has scope to further develop course in this area
- Project Able is providing awareness of careers to Year 11 and 12; Ticket to Work is a pathway for year 11 and students with a disability

Strengths and opportunities

- TasTAFE looking to provide more training in the regions; Huon Works in Geeveston could be applicable in the SERDA/ SCS regions
- Training Quality Network Round table has engaged with job Active, but this is early days. This is an effort by industry to shape training to better suit industry needs
- JobsAbility Program launched in November 2016 aims to increase employment of people with a disability
- Scope for sole/ small disability providers in regions to set up business and partner with more significant employers e.g Storm Disability in St Helens partners with a north-west coast service provider
- Potential to adopt labour-hire company model with TasICT involvement in developing back-end systems

Transport and logistics

Challenges include:

- Getting employers to invest more in training
- Attracting new prospective employees to industry led recruitment and training programs
- The variable success achieved through the Job Active services
- The high cost and opportunity cost of training in the industry

Opportunities include:

- Further roll-out of the workforce development plan
- Greater uptake for school-based apprenticeships
- Potential roles for councils in the regions to support joint education/ industry initiatives

Systemic challenges

- Employers need to invest more in training
- No local RTOs provide training; have to use interstate firms TransQual for forklift training. TasTAFE have no specialist courses for Cert II and III, only generic modules
- Some Skills Tas funded Job Ready programs providing Cert 2 and 3, with work placement, have had varying success running 3-4 times each year for 5-9 people; in August a 2-week intensive program for B-Double drivers was run, which attracted 5-6 people
- Varying success with job Actives - candidates are usually not good enough and bonus $10k payments to place longer term unemployed are not worth the trouble
- Training is very costly for truck drivers because of doubling up and lost productivity and risk management issues; have had nothing to do with the Trade Training centre, they had never heard of it

Strengths and opportunities

- Most of the actions in the sector plan are being implemented to good effect. School Bus driver apprenticeships "Careers on the Move" has worked well
- Another program exposed trainees to port, rail and truck related jobs and increased awareness of wide range of options in the industry; have almost completed Top 10 Jobs of the future and identified the education and training pathways to fill these jobs
- DECCA and TransTrain provide most training to the sector and do a good job
- Industry has developed Careers on the Move-a promotional video targeting years 8-10
- DoE has been targeting school based apprenticeships; industry needs to market itself better. Careers on the Move - 3 day program, select 20 kids covering road, rail, TT-Line and warehouse - up to 70 different careers with 4-5 rounds of program run each year
- TasTAFE provide more administrative and clerical training; need more apprenticeship programs
- Will need to do more 1:1 fast track work experience placements
- Councils can work closer with schools in regions to promote the industry, a Beacon-Foundation like role; mini job expos

Dairy

Challenges include:

- Attracting interest to undertake education before entering the industry
- The northern focus of the industry and the need to expand training to support the southern region

Opportunities include:

- Programs with schools to introduce dairy as a career
- Broader engagement across agricultural industries rather than operating as silos
- Courses being offered by UTas to support the industry

Systemic challenges

- The agricultural sector is doing more, sometimes in conjunction with the University, to get into schools and let people know what the industry is looking for
- UTas ran a program for science teachers to educate them on what the industry needs
- Most of the work is in the North of the state. Programs connect into farmers in the south but the hub for delivery is in the north. Most training is with people already in work but need to consider training models and locations for those who wish to enter the industry
- Demand comes at the same time for all farms. Most staff are full time (in general), there are seasonal busy times but not too much fluctuation. Employment agencies are not really interested and labour hire not common

Strengths and opportunities

- Programs with schools to introduce dairy as a career
- Industry participants could work together to promote agricultural opportunities across all sectors
- Broadly speaking its important for the industry themselves to help drive this. State Government and Councils to consult with industry and then support what they need in their sectors. Right engagement needs to happen with industry
- State Government has a strategy for increased agriculture - it needs to resource it and provide funding to assist with getting a workforce in there. Not just for students as a last resort. Growing the economy is not just about retail and housing
- New programs such as the associate degree in Agribusiness are now offered, unsure if its offered in south or just north/north west. The University is looking to do more to provide opportunities for people to do agriculture related courses

Fruit

Challenges include:

- Successful engagement with the Job Active providers
- Obtaining more training from TasTafe in the regions rather than having students travelling to TasTAFE campuses
- Optimising the capacity available in the Trade Training Centres
- Clarifying the position of UTas Associate degrees with TasTAFE Diplomas

Opportunities include:

- Establishing regional Job Hub model, along the lines of Huon Valley Works
- Extending the seasons for workers by promoting and recruiting for other labour intensive roles across multiple agricultural industries

Systemic challenges

- The industry hasn't had much success with the JobActives
- TasTAFE deliver sufficient courses and have improved in recent years. TasTAFE still too inclined to want to conduct training on their own premises, but should be providing training in the regions on employer premises etc
- Trade Training Centres have improved and can be more fully utilised, as these are good regional assets
- University has a role to play with the Associate Degrees; there would appear to still be some confusion as to where those qualifications compare with TasTAFE qualifications
- TFGA seems to not want to engage on this issue; seem to be working at more of the political level

Strengths and opportunities

- A labour hire model, along the lines of Huon Valley Works could be replicated in the regions – one in Sorell and one in the Derwent Valley
  - The role of the Job Hub is to match workers with jobs across all industries
  - This concept has attracted some support in State Growth, through RDA Tas and in political circles
  - Its feasibility needs to be proven up
  - There would a role for the councils to have representation on the Board of such an entity and help drive the service, along with the Trade Training Centres
  - The risk is that some vegetable grower use other labour hire companies e.g. VMAC
- There is scope for the seasonality of the jobs to be spread out to provide work all year round, except for perhaps a 2 month gap over winter
  - Apart from picking and packing, other jobs in orchards that need to be undertaken include trimming, weed management, fencing, irrigation, pest control etc.

Wine

Challenges include:

- Attraction and retention of highly skilled labour
- Providing career pathways
- Ageing workforce
- No specific viticulture training qualifications run in Tasmania
- Increase flexible working arrangements

Opportunities to advance workforce development planning are being devised

Systemic challenges

The wine industry skills needs survey identified the following key issues for which actions and strategies are under development:

- Attraction and retention of highly skilled labour
- Providing career pathways
- Ageing workforce
- No specific viticulture training qualifications run in Tasmania
- Increase flexible working arrangements

Appendices

Appendix 1: Regional profile

Regional profile

Population profile

Brighton has the largest populations with 16,010 and Central Highlands has the lowest with 2,309.

Central Highlands has the older population with a median age of 47.

Brighton has the youngest population with a median age of 37.

The number of persons under the age of 65 ranges from 79% to 88% across the councils.

Derwent Valley and Southern Midlands have similar age profiles and population density.

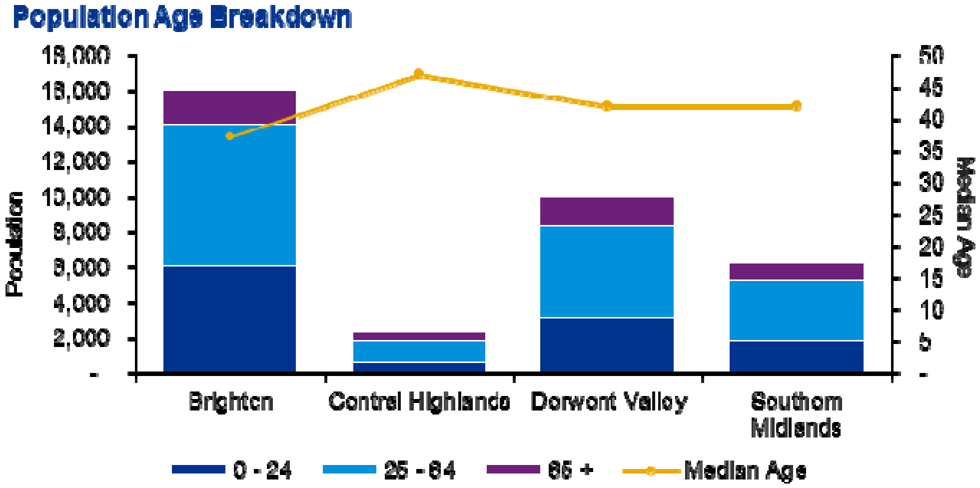
Brighton has significantly denser population at 93.5/sqkm.

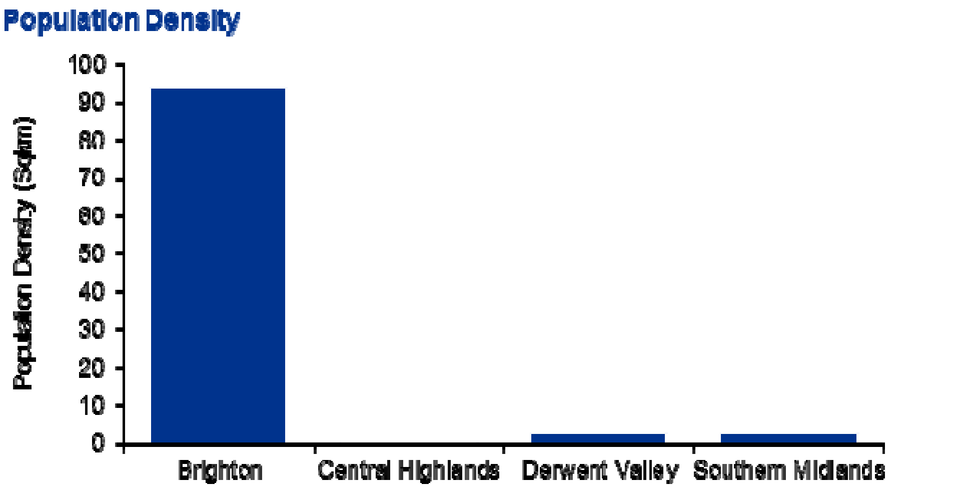
The population density of the other councils are quite low ranging from 0.3/sqkm to 2.4/sqkm.

Population Breakdown

The graphs to the right displays the population statistics for the SCS. The graphs highlight the population figures, population median age, the number of persons in different age brackets and the population density.

- The Brighton council has the largest population with 16,010 followed by Derwent Valley (10,026), Southern Midlands (6,278) and then Central Highlands (2,309).
- The Central Highlands council has the oldest population with a median age of 47 years. This is also supported by the fact that Central Highlands has the largest percentage of 20.7% in regards to persons above the age of 65.
- Brighton has the youngest population with a median age of 37 and the highest percentage of people in the 0 – 24 years age bracket at 37.5%.
- Derwent Valley and Southern Midlands have a similar age profile with a median age of 42. 83% of their respective populations are under the age of 65 years.
- Brighton's population has the highest density with 93.5/sqkm. Derwent Valley and Southern Midlands both have a densities of 2.4/sqkm. Central Highlands has the lowest at 0.3/sqkm.





Population projections

The population of Brighton is projected to grow by 37% whilst Central Highlands is projected to decline by 7%.

The median age of Brighton is projected to increase to 40 from 34.

The projected median age of Central Highlands is projected to increase from 47 to 54.

The number of persons in Brighton that are 65 or older are projected to increase from 12% to 22% of the population.

In Central Highlands these projections indicate that number of persons over the age of 65 will increase from 21% to 36%.

Population Projections

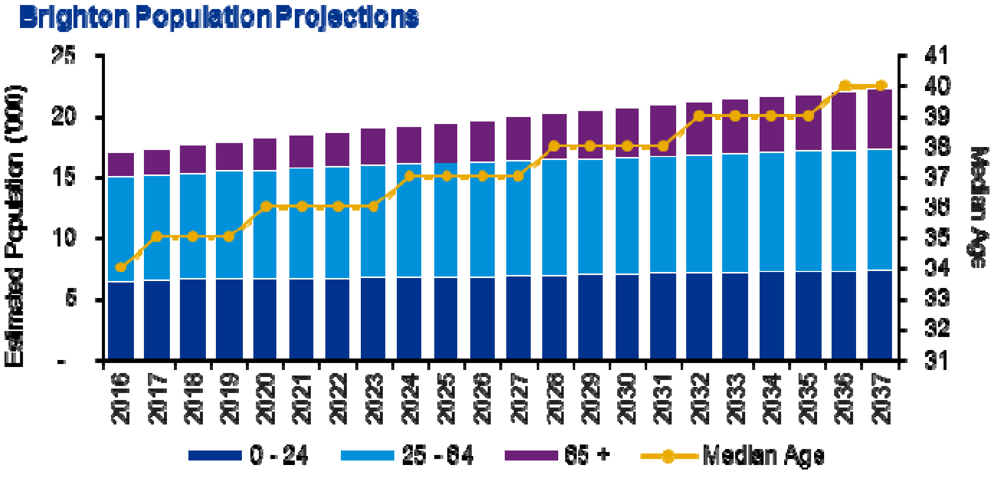
The graphs to the right present the population projections from the Department of Treasury and Finance. The graph projects the population, the population breakdown and the median age for each council.

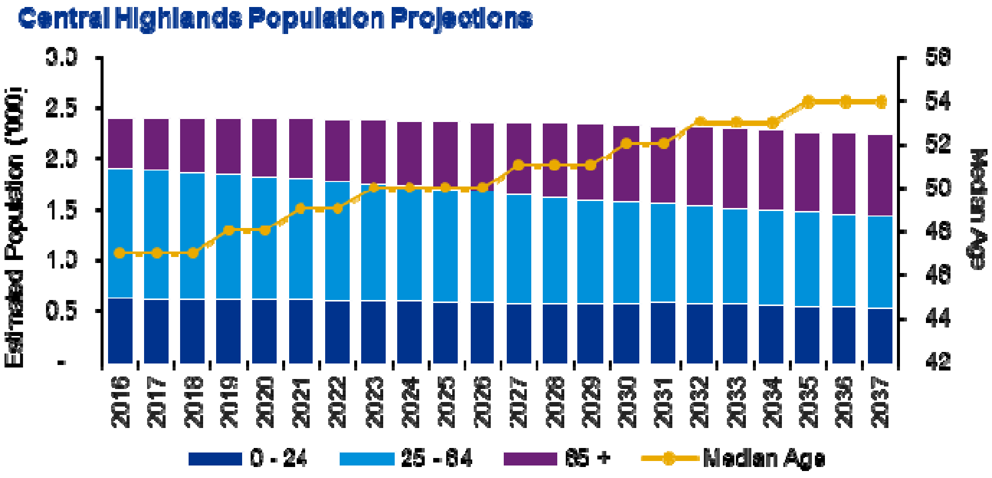
Brighton

- The population of Brighton is projected to grow by 31% which in absolute terms shows population grow from 16,977 to 22,159.
- The median age will increase from 34 to 40.
- The number of persons under the age of 65 will decrease from 88% to 78%.

Central Highlands

- The population of the Central Highlands municipality is projected to decline by 7%. The population will decline from 2,391 to 2.231.
- The median age will increase from 47 to 54.
- The number of persons under the age of 65 will decrease from 79% to 64%. This indicates that 36% of the population will be over the age of 65.





Population projections

The population of Derwent Valley is projected to decline by 1%

Southern Midlands population is projected to grow by 14%.

The median age of the Derwent Valley population is projected to increase to 41 from 47.

The projected median age of the Southern Midlands population is projected to increase from 44 to 52.

The number of persons in Derwent Valley that are 65 or older are projected to increase from 17% to 28% of the population.

The Southern Midlands projections indicate that number of persons over the age of 65 will increase from 18% to 33%.

Population Projections

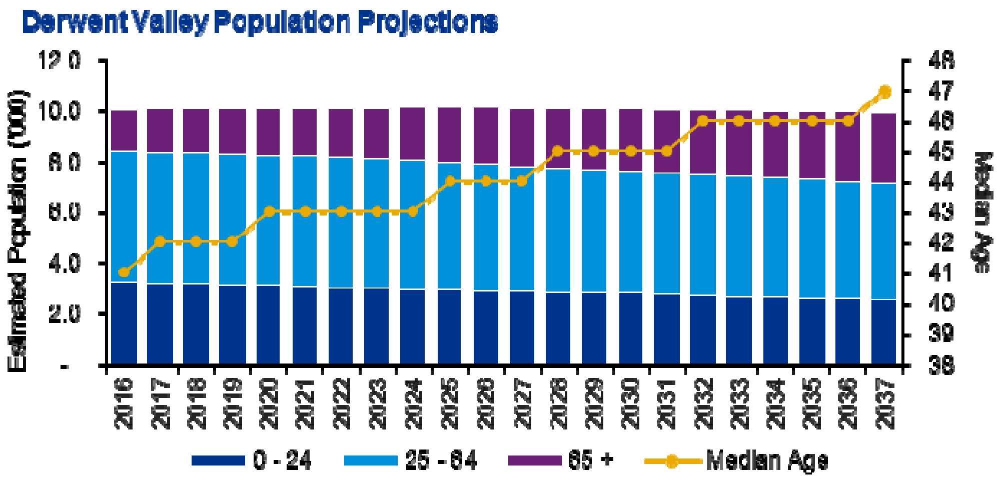
The graphs to the right present the population projections from the Department of Treasury and Finance. The graph projects the population, the population breakdown and the median age for each council.

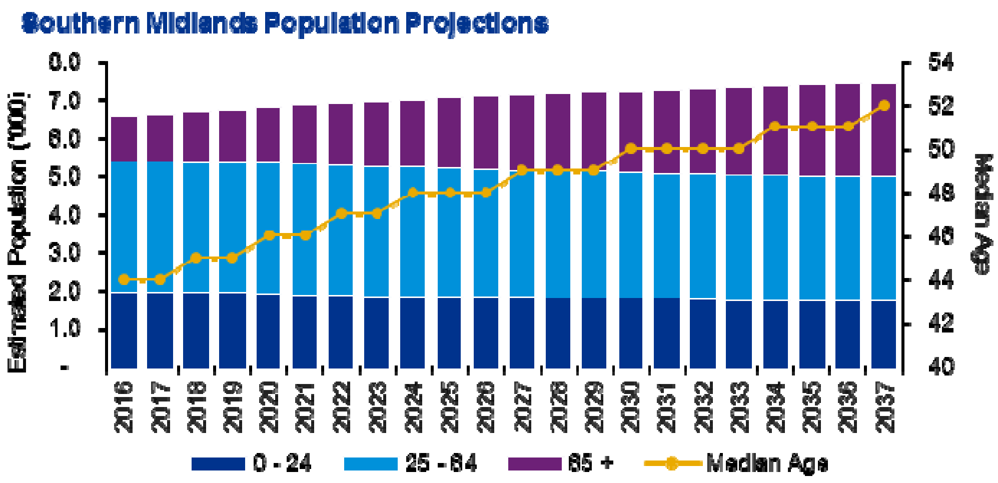
Derwent Valley

- The population of Derwent Valley is projected to decline by 1%. The population will decline from 10,029 to 9,908.
- The median age will increase from 41 to 47.
- The number of persons under the age of 65 will decrease from 83% to 72%.

Southern Midlands

- The population of the Central Highlands municipality is projected to grow by 14%. The population will decline from 6,564 to 7,451
- The median age will increase from 44 to 52.
- The number of persons under the age of 65 will decrease from 82% to 67%. This indicates that 33% of the population will be over the age of 65.





Income

Brighton has the most income earners and the highest average income per income earner.

Central Highlands has the lowest number of income earners and lowest average income per earner.

Brighton has the youngest workforce followed by Derwent Valley, Southern Midlands and then Central Highlands with the oldest.

Brighton, Central Highlands and Derwent Valley receive more government support than the Tasmanian benchmark.

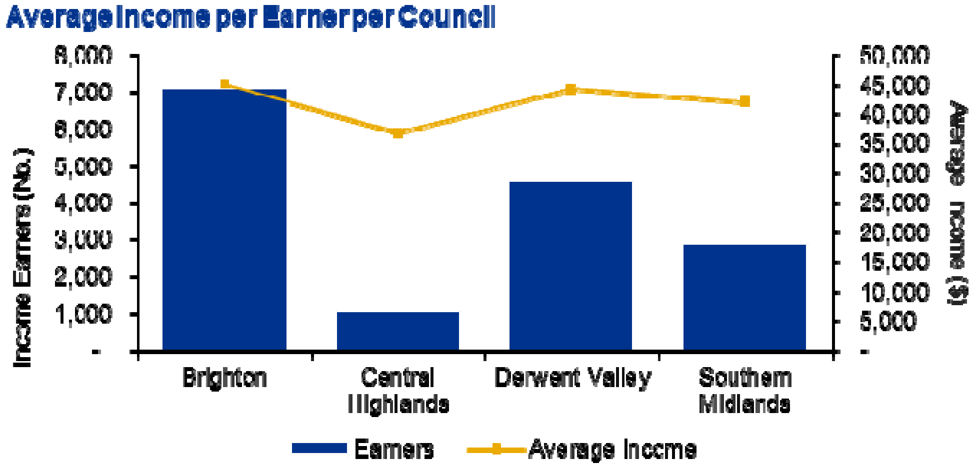
Southern Midlands is on par with Tasmania with more emphasis on parenting support and less on pension and youth allowance.

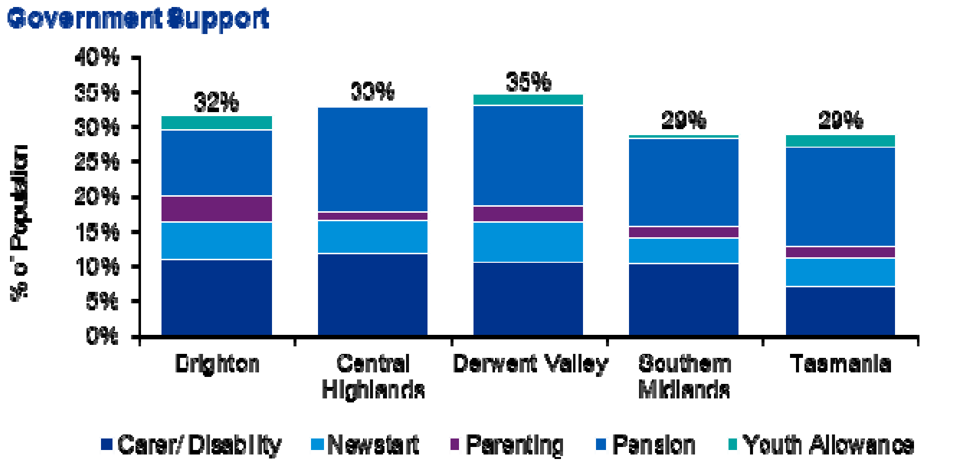
Income

The graphs to the right provide analysis on income earned by earners and government provided support such as the pension. The data depicts the number of income earners, average income and the percentage of the population that receives government support.

The data indicates the following findings:

- Brighton has the most income earners at 7,096 and the highest average income at $44,986.
- Central Highlands has the lowest number of income earners with 1,026 and the lowest average of $36,807.
- Brighton has the youngest workforce with a median age for income earners at 41 and Central Highlands has the highest at 47. Derwent Valley and Southern Midlands have a median working age of 44 and 46 years respectively
- All of the councils are above the Tasmanian benchmark with an average of 11% of the population receiving carer/disability support.
- The councils are also slightly above the Newstart and parenting support benchmarks in comparison to the Tasmanian benchmark.
- All councils except Southern Midlands receive more support than the Tasmanian benchmark.





Industries

It is apparent that the agriculture, forestry and fishing industry has the most businesses in the SCS.

Construction has the second highest number of businesses.

The information, media and telecommunications industry has the lowest number businesses.

Whilst Construction has the most businesses in Brighton, agriculture, forestry and fishing has the most businesses in the remaining states.

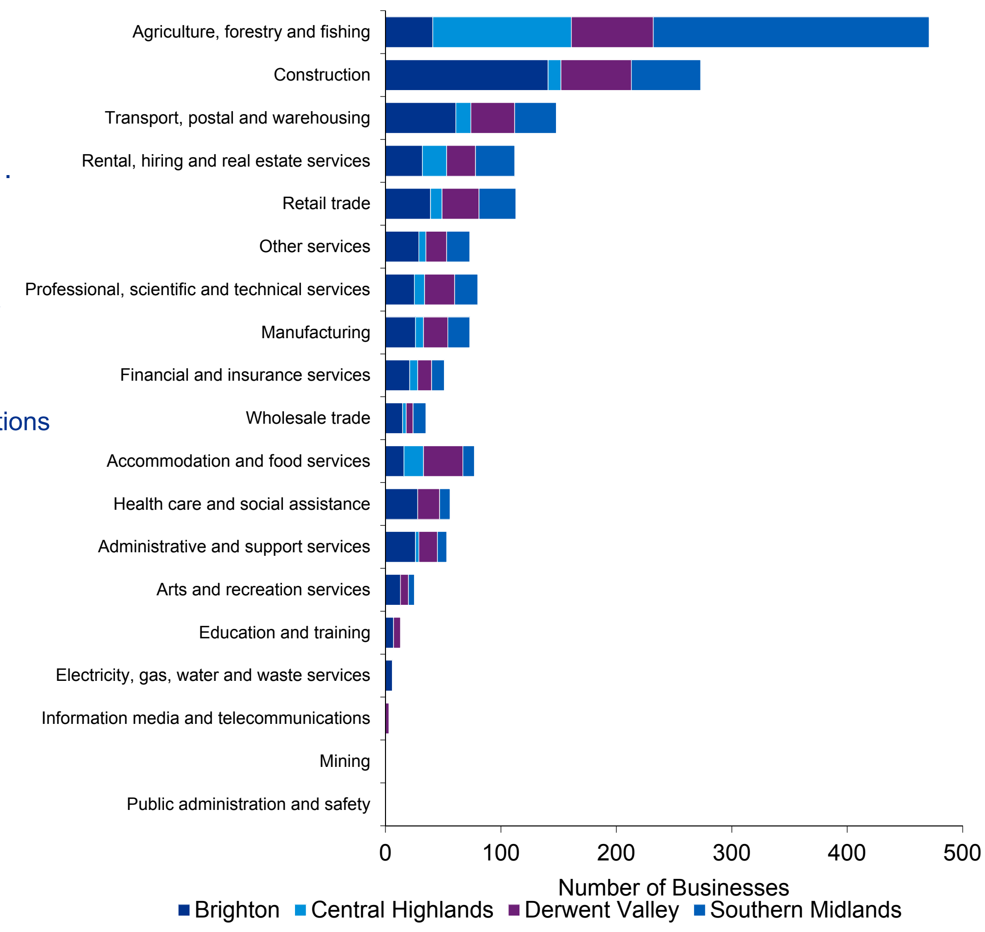
Overall, Brighton has the most number of businesses followed by the Southern Midlands, Derwent Valley and then the Central Highlands.

Businesses

The graph to right presents the number of businesses found in each industry within the SCS and each municipal area. The graph indicates:

- The agriculture, forestry and fishing industry has the most number of businesses with 471. Southern Midlands contributes 239 businesses whilst Central Highlands has 120.
- Construction has the second largest number of businesses with 273. Brighton contributes over half of these businesses with 141.
- The information, media, and telecommunications industry has the lowest number of businesses with a total of 3. All of these businesses are located within the Derwent Valley municipality.
- Construction has the most businesses in Brighton. Agriculture, forestry and fishing has the most businesses in the Central Highlands, Derwent Valley and the Southern Midlands.
- Brighton overall, has the most businesses with a total of 526 across all industries. Southern Midlands has 514 and Derwent Valley has 395. Central Highlands has the least with 227 in total.

Number of Businesses per Industry: South Central



Economic Indicators

Central Highlands has the largest GRP per worker despite have the lowest GRP.

Brighton and Derwent Valley have the same level of GRP but Derwent Valley is more efficient in regards GRP per worker.

Brighton has the equal higher GRP but lowest GRP per worker.

Southern Midlands places third for the highest GRP and GRP per worker.

The total GRP for SCS amounts to $913,000,000. This equates to $114,511.

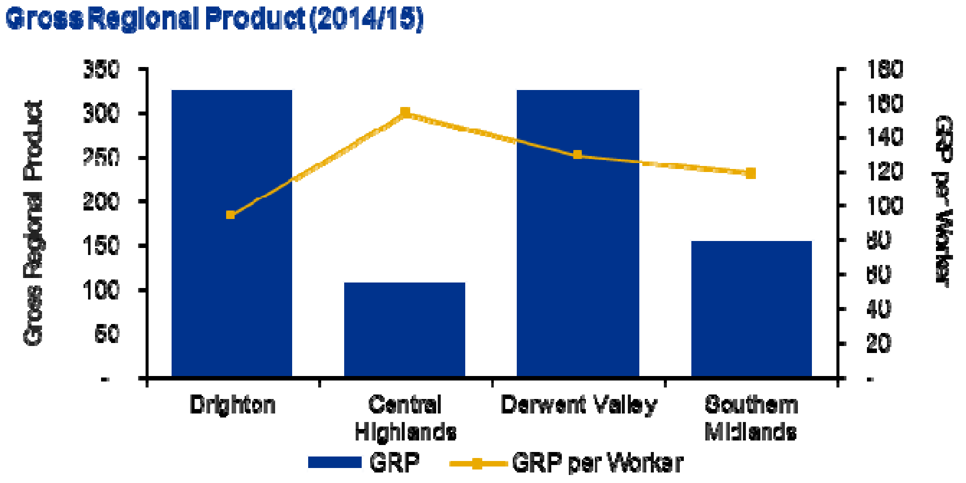
Brighton has the highest number of local jobs and the Central Highlands has the lowest.

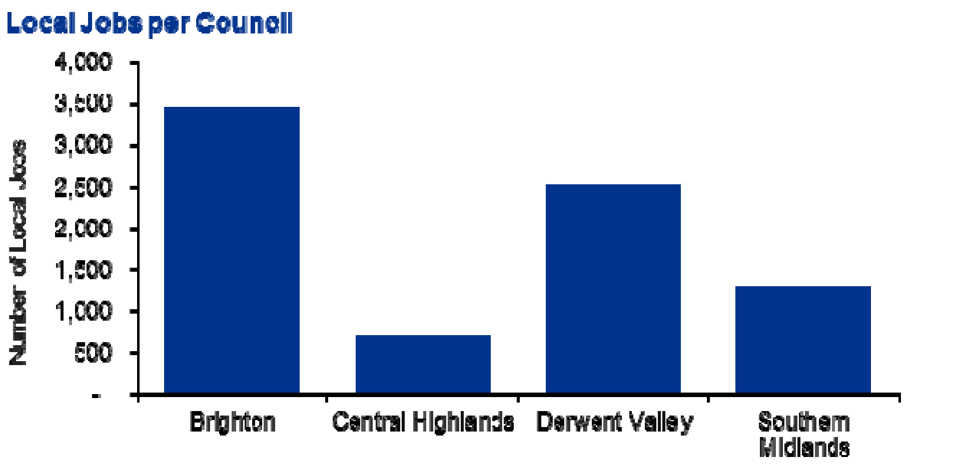
In total, the SCS has 7,973 local jobs.

Economic Indicators

The graphs to the right present three economic indicators such as the Gross Regional Product (GRP), GRP per worker and the number of local jobs per council. The data indicates the following:

- Central Highlands has the highest GRP per worker with $153,899. This is despite Central Highlands having the lowest GRP at $107,000,000.
- Brighton and Derwent have approximately the same GRP with a total of $326,000,000. Derwent Valley has a higher amount of GRP produced per worker with $129,326 whilst Brighton has $94,101.
- Southern Midlands has a GRP of $154,000,000. GRP per worker for Southern Midlands is $119,068 per worker.
- The GRP total for the SCS would amount to $913,000,000. This would equate to a GRP per worker of $114,511.
- Brighton has the most local jobs with 3,464 followed by Derwent Valley with 2,523, Southern Midlands with 1,291 and then Central Highlands with 695.
- In total the SCS has 7,973 local jobs within the region.





Labour Force Survey

Overall the workforce of each of the councils have remained fairly consistent in size over the last seven years.

All SCS councils have experienced little growth in their workforce since 2010.

Each council has experience peaks in the unemployment rate between 2012 to 2014.

In 2016, Brighton has the largest unemployment rate at 10.4%.

Southern Midlands had the lowest unemployment rate at 3.6% in 2016.

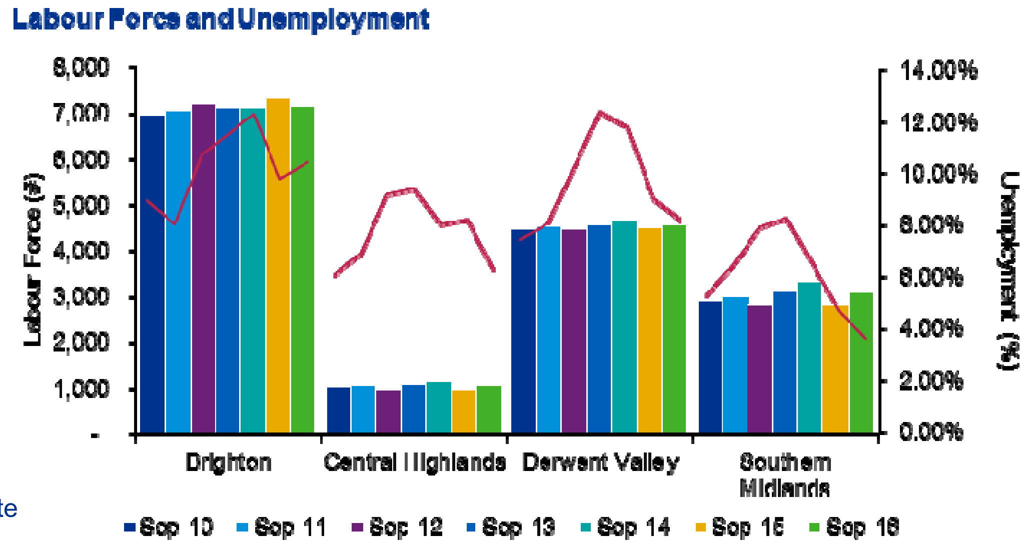
Brighton, Central Highlands and Derwent Valley has experience growth in their unemployment rates since 2010.

Southern Midlands is the only council to experience a decline in their unemployment rate since 2010.

Labour Force

The graph presented to the right shows the size of the labour force and unemployment for each council over seven years.
The data indicates:

- The size of Brighton's labour force has remained consistent of the last seven years ranging from 6,900 to 7,150. Unemployment in Brighton increased since September 2010 (8.9%) which is now 10.4% (September 2016).
- The Central Highlands labour force has remained fairly consistent at a range of 975 to 1,154. The unemployment rate had peaked in September 2013 at 9.2%. The rate has dropped to 6.3% in September 2016.
- Derwent Valley labour force has also remained consistent with range of 4,453 to 4,686. The unemployment rate peaked in September 2013 at 12.4%. Similar to other councils, the rate declined and resulted in 8.2%.
- Southern Midlands workforce has shown the most volatility with a range of 2,802 to 3,316. Southern Midlands unemployment rate is the rate to decline since September 2010 when it was 5.3%. In September 2016 the rate was 3.6%.
- All councils have seen peaks in unemployment in 2012/13. However, the rates have declined since.



Labour Force Survey as at November 2016

	Employment Rate (%)	Participation Rate (%)	Youth Unemployment Rate (%)
West and North West	70.3	59.3	12.6
Launceston and North East	68.5	59.6	20.8
Hobart	**69.4**	**60.7**	**15.2**
South East	**68.7**	**57.4**	**15.9**
Tasmania	**69.4**	**59.8**	**16.2**

Socio-Economic Index for Areas (SEIFA)

Brighton, Central Highlands and Derwent Valley all fall in the bottom 25% of Tasmania.

Brighton is the lowest ranked council in Tasmania.

In comparison to Tasmanian, Brighton, Central Highlands and Derwent Valley are relatively disadvantages in comparison to other councils in Tasmania.

Southern Midlands is ranked near the Tasmanian median.

All of the councils fall in the bottom 25% of Australia.

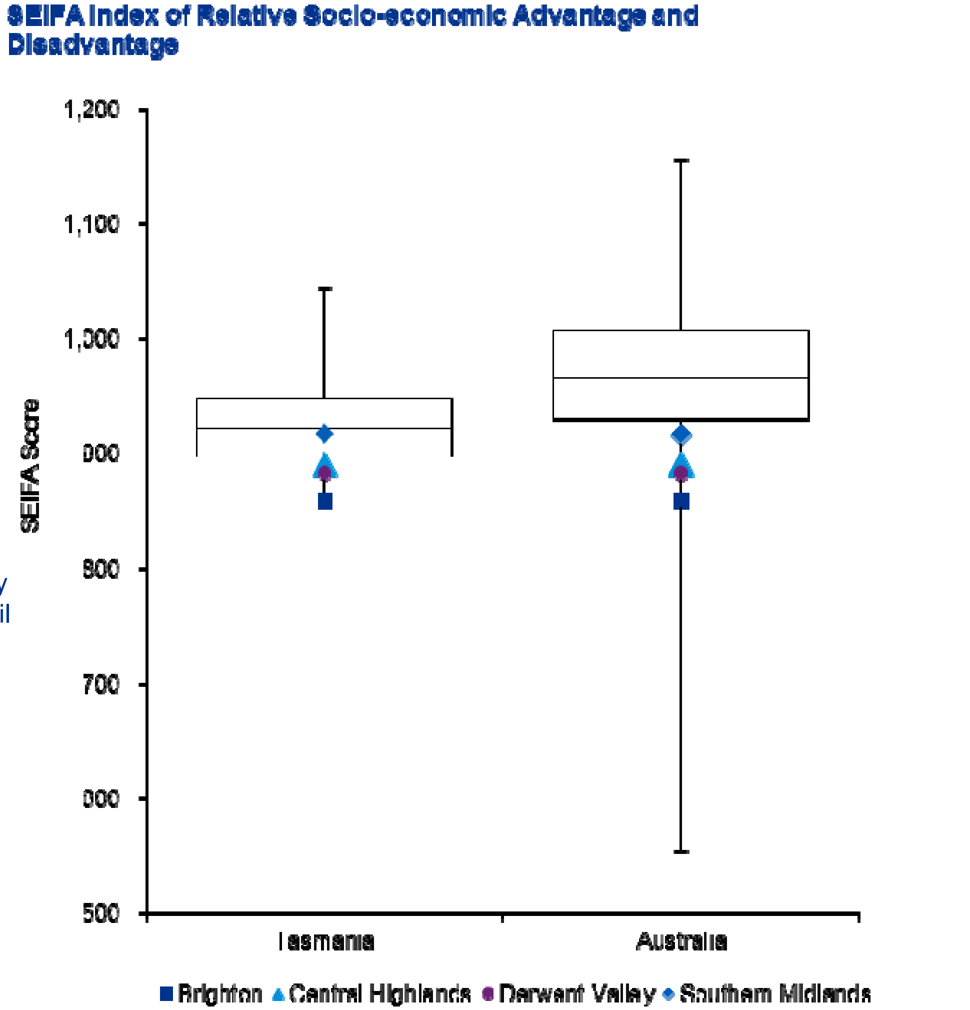
In comparison to the nation, SCS is relatively disadvantaged in comparison to councils around Australia.

SEIFA of Relative Socio-economic Advantage and Disadvantage (RSAD)

The SEIFA RSAD presents an index that ranks municipal areas based on socio-economic variables such as unemployment, income, attained post school qualifications, occupations etc. A higher score/rank means that a council is relatively greater advantaged or lesser disadvantaged in comparison to another council.

The SEIFA RSAD data indicates:

- Brighton, Central Highlands and the Derwent Valley score in the bottom 25% of Tasmania. Therefore, these councils can be considered relatively disadvantaged or less advantaged than councils in the top 3 quartiles.
- In particular, Brighton has the lowest score in Tasmania. This means that Brighton is relatively most disadvantaged or least advantaged council in Tasmania.
- The Southern Midlands councils has score close to the Tasmanian median.
- Overall all of the councils are ranked in the bottom 25% nationally. This means the SCS is relatively disadvantaged in comparison to other councils nation wide.



Education

Brighton and Derwent Valley fall into the bottom 25% of Tasmania and Australia in the SEIFA IOE.

Central Highlands and Southern Midlands rank within the fourth and fifth decile of the IOE respectively. They rank in the bottom 25% of Australia.

All of the councils have proportionately less persons that have attained post school qualifications

With the exeception of the certificate category, the councils are below Tasmania in each category.

Brighton was the only council proportionately below Tasmania in regards the certificate category.

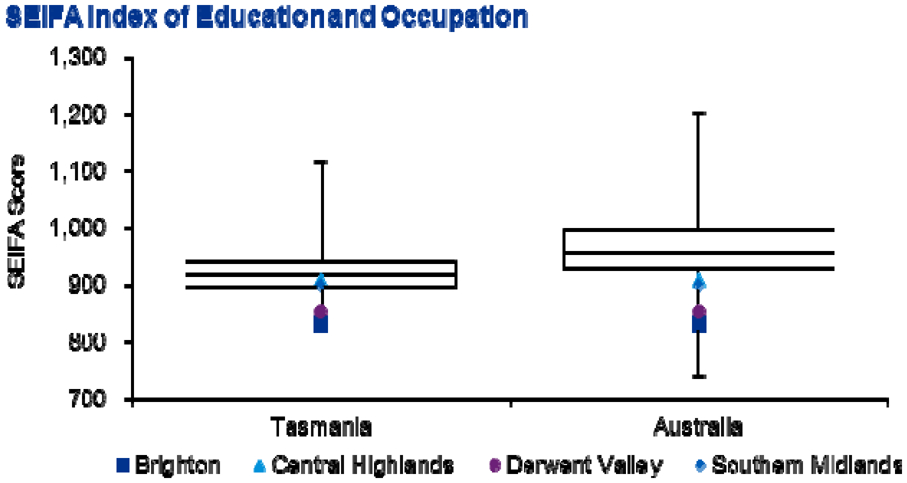
The councils were above Tasmania in regards to the inadequately described category.

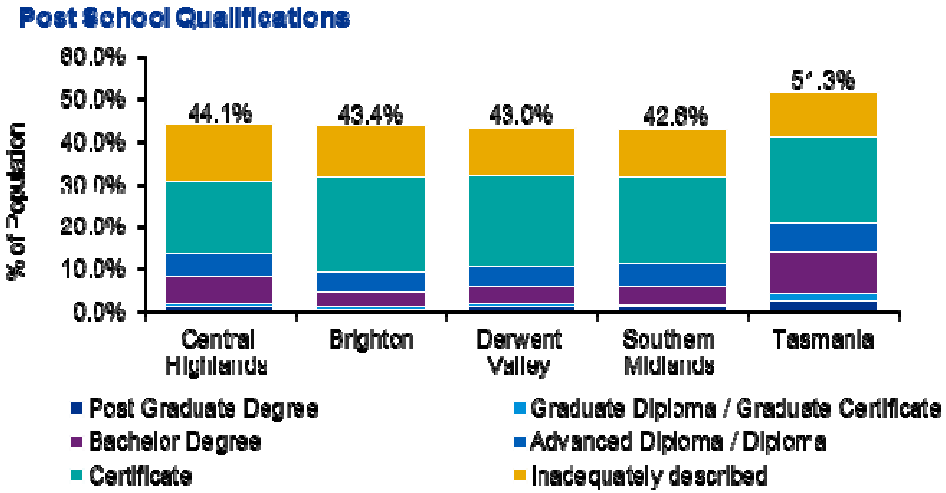
Education

The graphs to the right present the SEFIA index of education and occupation (IOE) and the percentage of the population that have post school qualifications. The SEIFA IOE scores indicates the relative advantage of councils in education and occupation. A higher score represents a relatively higher advantage and vice versa.

The data indicates:

- Brighton and Derwent Valley fall in the bottom 25% of Tasmania and Australia. Brighton has the lowest score in Tasmania.
- Southern Midlands falls into the fourth decile (31% - 40%) whilst Central Highlands are ranked in the fifth decile (41% - 50%). Both councils rank in the bottom 25% of Australia.
- In terms of post school qualifications, all councils are below Tasmania in terms of persons having post school qualifications.
- In comparison to Tasmania all councils have proportionately less persons with a post graduate degree, graduate diploma or graduate certificate, bachelor degree and advanced diploma / diploma.
- Brighton is the only council below Tasmania in terms of having less people with a certificate.





Tourism

Overall the locations shown in the graphs have experience growth in visitor number.

Derwent Bridge has experienced the most growth with number of visitors growing from 92,278 to 132,002.

Derwent Bridge and Bothwell have experience upward trending in visitors year on year.

2013 and 2016 figures appear to be similar for New Norfolk, Oatlands and Derwent Bridge

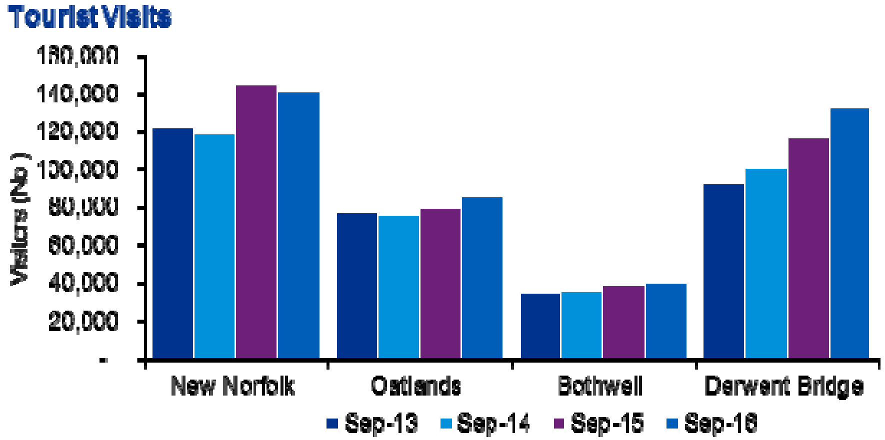
Bothwell has experienced a decline in the number of average nights spent going from 2.9 to 1.8.

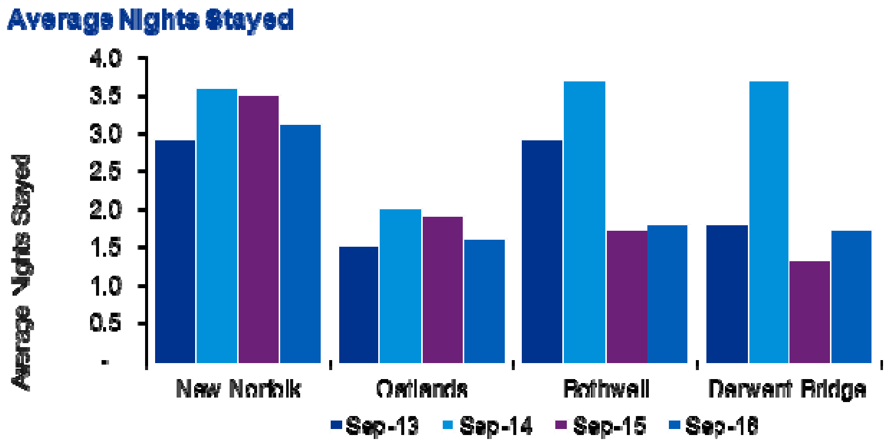
In 2014, the average nights stayed had peaked for all of the locations.

Tourism

The graph to the right displays tourism data in regards to the number of visits per year and the average nights stayed. The data show:

- The number of visitors in New Folk has grown by 15.26% from 2013 to 2016. The number visitors have grown for each other location. Oatlands has experience growth of 10.76%, Bothwell has grown by 13.42%. Derwent Bridge experienced the most growth with 43.05%
- The number of visitors to Derwent Bridge has been trending upwards year on year. This is also the case for Bothwell.
- New Norfolk has the highest average stayed which is 3.1 night. This number had peaked in 2014 at 3.6.
- Oatlands average night stayed in 2016 is 1.6. Oatlands average nights spend had peaked in 2014 at 2.0.
- Bothwell has experienced a decline in the average nights spent which went from 2.9 and 3.7 in 2013 and 2014 respectively to 1.7 and 1.8 in 2015 and 2016
- Derwent has remained relatively the same average night spent slightly declining from 1.8 in 2013 to 1.7 in 2016. There was a peak of 3.7 in 2014.





Appendix 2: Industry workforce action plan summaries

Tourism and hospitality

Strategic objective/ issue	Actions
Attracting labour to regional areas *There is a labour shortage in the industry*	**Promote the industry as a great career pathway** 1. Develop region specific strategies and attendant promotional campaigns emphasizing the lifestyle choice of regional areas. This promotional campaign should market the tourism/hospitality industries in a package with other regional industries such as fruit. This will promote employment in the region generally and will highlight the employment opportunities for spouse relationships. **Develop and promote a career map for the industry.** 1. Develop a one stop information portal to inform workers about opportunities in the industry and; 2. Industry operators about available programs to help them attract labour 3. Implement a broad based ambassador program to promote the different careers available in the industry 4. Establish awards to acknowledge those who have been performing strongly in industry workforce development 5. Create a program that helps regional tourism organisations put together promotional campaigns that attract workers to specific locations and develop and implement employment strategies **Tap into new sources of labour** 1. Undertake a call for proposals that will attract workers from new labour sources such as existing workers in other industries, unemployed, disabled job seekers, older workers, school leavers, women re-entering the workforce 2. Develop an advertising campaign to national and international workers (both temporary and permanent) 3. Develop better youth programs such as internships in order to attract young people to the industry 4. Remove unnecessary red tape associated with the industry **Improve the transition school/training to work** 1. Develop industry based promotion of school pathway programs that include financial incentives for employers 2. Implement a Famil program. This program educates the educators by exposing them to real life industry activities — Develop better youth programs such as internships in order to attract young people to the industry — Remove unnecessary red tape associated with the industry **Improve the transition school/training to work** 1. Develop industry based promotion of school pathway programs that include financial incentives for employers 2. Implement a Famil program. This program educates the educators by exposing them to real life industry activities

Tourism and hospitality

Strategic objective/ issue	Actions
Skilling the Workforce *The industry workforces lacks skills*	**Aligning training to industry needs** 1. Undertake a call for proposals that will strengthen the relationship between the industry and the education and training sector. 2. Develop and implement new training pathways for - Chefs/bakers - Pastry cooks/cooks/food trades assistant - Sales staff - Team leaders 3. Improve business and human resource management skills for businesses by building on relevant pre-existing programs 4. Assign greater State Government funding to developing customer service skill sets as well as currently supported qualifications **Improve training culture** 1. Build on existing programs to develop a leadership/mentoring program. This program will be aimed at improving the workforce development in the industry 2. Use an ambassador program to improve the industry's knowledge of the importance of customer service. **Improving regional delivery** 1. Improving the capability of industry bodies to develop programs for 'aggregating' training demand for small to medium sized businesses in regional areas.
Improving access to affordable accommodation *Lack of transport to regional locations deters workers*	1. Develop region specific strategies to provide affordable accommodation

Tourism and hospitality

Strategic objective/ issue	Actions
Improve regional transport services *Need to improve access to the regions*	1. Better public information via website and community focal points 2. Improved integration of profit and not-for-profit and other transport options 3. Coordination and integration of timetables, ticketing, planning and park n rides 4. New types of services, including those feeding scheduled services 5. Implementation of regional mobility manager positions 6. Increase spending on public transport -Tasmania currently has the lowest funding of any state/territory at $200 per capita (next lowest state is South Australia at $605 per capita) http://tascoss.org.au/Portals/0/Documents/Publications/Reports/TasCOSS%20Transport%20in%20the%20Community%20Project%20report%20Oct%202014.pdf

Building and construction

Strategic objective/ issue	Actions
A Workforce for a Competitive Future	The building and construction industry provides 10% of Tasmania's fulltime workforce. It also provides the essential infrastructure that other industries need. The Tasmanian Building & Construction Industry Training Board (TBCITB) recognises that maintaining a well trained core workforce is in the public interest and fundamental to the development plans of others. The Workforce Development Plan 2016 – 2020 aims to achieve this goal.
Skills for A Growing Population	A growing population needs dwellings, infrastructure and commercial buildings. Maintaining a well trained core building and construction workforce is a fundamental.
Build Business capability and entrepreneurial spirit and helping young Tasmanian to succeed at work.	The board promotes and provides access to management level training. It has identified Co-preneurs as a vital group for an efficient industry. Apprenticeships are a solid base for a successful business career. The Board sees 1500 starters a year as needed to maintain the supply of skilled workers.
A responsive and contemporary TASTafe	TBCITB sees the TasTafe as extremely important to ensure state wide access to the necessary skills training and works closely with it.
Encouraging high quality training providers	TBCITB every subsidised training course and when issues are raised by trainees will take them up with the training provider.
Responding to emerging skills needed	Evaluation of training packages is routine for work for the board. The board has jointly created BIMHub to provide a forum for keeping pace with technological change.
Addressing inequality, taking advantage of opportunity	The TBCITB has agreed to performed actions in alignment with this ministerial priority.
Supporting Tasmanian businesses to adapt and grow.	The TBCITB has agreed to performed actions in alignment with this ministerial priority.

Aged care services

Strategic objective/ issue	Actions
Workforce planning	**The sector has access to the required number of appropriately qualified workers enabling us to meet both current and future workforce demands** • Workforce census - Done via online survey, Provided the industry with key information about the workforce such as what areas needed to be filled • Career pathways - The census indicated that the fastest aging sector of the workforce was registered nurses - Created a sector wide Graduate Nurse Transition to Practice Program
ACST Brokerage Service	**The sector has access to the knowledge and skills required to ensure that it gains maximum benefit from the available training dollars** **The sector has access to the knowledge and skills required to ensure that we are able to meet both current and future workforce requirements** • Provide advice to organisations around what funding they may be eligible for and how they can access it (and the most efficient avenue of funding) • Provide Skills Tasmania (and other relevant stakeholders) with information in relation to the skills needs of the sector. • Promote and offer workforce planning and development consultancy and support services to all Aged Care Service Providers • Support organisations to implement programs, help to ensure that they gain maximum value for the training dollar available
Capability and Capacity Building	**The sector has ownership of/is driving training and professional development for our Sector** **The sector has a strong working understanding of the Vocational Education and Training System and how we can make it work for us** **Registered Training Organisations and relevant VET and Higher Education Stakeholders have a strong understanding of the learning and development requirements of our Sector** • Industry Reference Group - Provided the industry a better opportunity to understand the VET Sector, training and development opportunities, funding opportunities and (when used effectively and efficiently) the benefits this could bring • RTO Round Table - Approximately 14 RTO's regularly participate in meetings. Both groups meet quarterly. Bringing both groups together' is clearly providing an opportunity for Industry and RTOs to work together to provide quality training opportunities for our Sector.

Aged care services

Strategic objective/ issue	Actions
Learning and development Network	**The sector has a culture of working together to identify, develop, share and efficiently and effectively implement training and development opportunities for our workforce** **The Sector is able to easily identify and access training and development opportunities relevant to both organisational needs and the needs of individual employees** **VET service providers have established 'communication networks' into our sector** • A highlight of the Project is the development of a culture where industry actively and willingly works together on workforce development and planning projects • Innovative Leadership – E Learning for Participation and Skills • Collaboration and Sharing of Information - Workforce Development Portal & Alfresco
Skilling and Developing our Workforce	**Our current and future workforce has the required skills and knowledge to ensure the delivery of quality services to our clients.** • Skill Centres - 'Aged Care Services Centre of Excellence' are envisaged to be established in each region of the state with one currently existing in the Glenview Community Services Centre in Glenorchy. This can also be used by disability services • Quality project - The quality and inconsistency of the delivery of the Certificate III in Aged Care and Certificate III in Home & Community Care continues to be of major concern to our members. The new program will be run on a regional basis

Disability care services

Strategic objective/ issue	Actions
Support remote and regional communities to strengthen and grow their disability workforces	**For people with disability living in remote and regional areas to have access to high quality support and therapy services** • Map service delivery and models of delivery in regional, rural and remote communities • Liaise with communities on the east and west coasts to develop and implement a plan of action to strengthen the disability workforce in each region
Support the sector to consolidate employment and minimize fragmentation of the workforce	**The support worker workforce is strengthened in regional areas to meet demand under the NDIS. Support workers are offered consolidated employment opportunities.** • Establish a shared labour pool with seed funding to service regional areas of Tasmania

Sector workforce profiles

Transport and logistics

Strategic objectives/ issue	Actions
Awareness *Workforce development not prioritized*	The plan should be endorsed by the State Government, and by the industry and then launched and communicated to the community and other stakeholders.
Confirm governance *Change management*	Confirm the role of Tasmanian Transport & Logistics Workforce Advisory Group (TTLWAG) and seek formal government recognition and support
Establish how to kits for top 10 occupations *Recruitment* **	Increase recruitment entry points – focus on occupations needed
Develop roll out strategy for kits *Recruitment*	Focus on occupations in demand (not demographics available)
Develop practitioners capacity building program *Capacity building aging population*	Build a practitioners network to implement and demonstrate leadership
Develop business accreditation program *Industry professionalism raising standards*	Multiple accreditation models exist – consultation required to determine framework and lobbying for government support

Dairy

Strategic objective/ issue	Actions
1. Developing a Training Culture	1. Provide maps that clearly illustrate: • the job roles employed in the dairy industry workforce; • the skill sets required for those job roles; • the qualifications available that can provide those skill sets; and • the potential career pathways within the dairy industry; and • Communicate the maps to industry stakeholders to generate acceptance and buy-in. 2. Establish a project to encourage dairy industry use of the training system that involves the following activities: • Working with Dairy Australia and the NCDEA to develop a series of case studies and other relevant resources that demonstrate the value of training to dairy business profitability and competitiveness and to dairy industry workers; and • Developing resources that simplify and assist employer engagement of Australian Apprentices and work placements. • Establish a formal protocol that supports the linking of accredited and non-accredited training options.
2. Building the Business of Dairying	1. Develop an understanding of the skill needs of dairy farm managers and how well these needs are currently being met in terms of the range, accessibility and quality of skill development options. 2. Investigate the feasibility of establishing a targeted management program, possibly involving the concept of a national dairy industry management cadetship.
3.Skilling the Dairy Workforce	1. Developing an improved understanding of how well the skill needs of dairy farm workers are currently being met; and 2. Improving the range of options available for developing priority operations level skill sets.
4.Improving Quality Training Outcomes	1. Deliver services to improve the capacity and capability of RTO staff. 2. Enhance the Recognition of Prior Learning services to support the credentialing of skill development activities supplied to the dairy workforce. 3. Build on existing DairyTas activities to generate industry involvement in: 4. Ensuring that the TSI has ready access to industry experts and exemplars; 5. Introductory programs, eg. Discover Agriculture, Cows Create Careers, Picasso Cows; and 6. Industry placement programs, eg. UTas, VET in Schools.

http://www.skills.tas.gov.au/employersindustry/workforceplans

Fruit

Strategic objective/ issue	Description (no actions yet developed)
The industry is shifting towards higher skill requirements, particularly in terms of managing, leading and innovating	Evidence suggests there "there is a genuine concern by small business operators that they do not possess the necessary business management skills to help their business grow".
Worker recruitment and retention	The key challenges in retaining workers reported by firms in the fruit industry involve the seasonal nature of the work and the salaries/wages Concern amongst industry operators that there is a need to improve the 'image' of the industry and increase the attractiveness/appeal of the job.
Constantly changing production requirements and market conditions	Backpackers tax Trade agreements Exporting demands
Competition for labour	Higher wages offered in different industries for job roles with transferable skills
Lack of career pathways	1. Promote career pathways and conditions that reflect the increasing diversity of the future workforce 2. School forums and 'information days'

Wine

Strategic objective/ issue	Actions
Attraction and retention of highly skilled labour	Promotion of current training courses available. Collaborate with training providers to offer courses where available. Support planning activities of individual wine businesses Ensure job ready vineyard workers Determine sales and marketing requirements Facilitate job sharing of employees
Providing career pathways	Linked to point above
Ageing workforce	Linked to point above Promote attractiveness, courses etc. towards youth areas.
No specific viticulture training qualifications run in Tasmania	
Increase flexible working Arrangements	"If a more flexible arrangement could be introduced where the hours could be spread over the working year, this would provide a further incentive for employers to put their staff through training with a qualification outcome"

Appendix 3: Course availability by industry

Course availability by industry

Higher education

Higher education			
Health, aged and disability	**Building and construction**	**Tourism and hospitality**	**Transport and logistics**
University of Tasmania — Bachelor of Nursing	**University of Tasmania** — Bachelor of Engineering — Bachelor of Engineering with Honours — Bachelor of Engineering Technology	**University of Tasmania** — Bachelor of Business (Majoring in tourism)	**University of Tasmania** — Graduate Diploma of Aviation and Business

Course availability by industry

Higher education

Courses / qualifications

Dairy	Horticulture (Fruit and vegetables)	Wine

Dairy / Horticulture (Fruit and vegetables)

University of Tasmania

- Bachelor of Agricultural Science (Honours available)
- Bachelor of Applied Science (Agriculture and Business)
- Bachelor of Applied Science (Environmental Science)
- Bachelors of Natural Environment and Wilderness Studies (Honours available)
- Bachelor of Surveying and Spatial Sciences (Honours available)
- Associate Degree in Agribusiness
- Associate Degree in Agribusiness (Specialisation)

Wine

University of Tasmania

There are no courses run through the University of Tasmania that is directly related to viticulture. However, the following courses could be undertaken to further develop the students understanding of the field and career options.

- Bachelor of Agricultural Science (Honours available)
- Bachelor of Applied Science (Agriculture and Business)
- Associate Degree in Agribusiness
- Associate Degree in Agribusiness (Specialisation)

Other courses outside Tasmania

- Degree in Wine making
- Bachelor of Applied Science (Viticulture)

Vocational education

Tourism and hosptiality

Courses/ qualifications

Apprenticeships/Traineeships available while at school

- Certificate III in Commercial Cookery
- Certificate III in Customer Contact
- Certificate III in Customer Engagement
- Certificate I in Hospitality
- Certificate II in Hospitality
- Certificate III in Hospitality
- Certificate II in Kitchen Operations
- Certificate II in Tourism
- Certificate III in Tourism

TasTAFE

- Advanced Diploma of Travel and Tourism
- Certificate I in Hospitality
- Certificate II in Hospitality
- Certificate II in Kitchen Operations
- Certificate II in Tourism

TasTAFE

- Certificate III in Commercial Cookery
- Certificate III in Hospitality
- Certificate III in Tourism
- Certificate IV in Hospitality
- Certificate IV in Travel and Tourism
- Diploma of Events
- Diploma of Hospitality

Smart City Vocational College

- Certificate II in Hospitality
- Certificate III in Hospitality

Course availability by industry

Vocational education

Aged and disability care
Courses/ qualifications

- Assist clients with medication
- Certificate II in Community Services
- Certificate III in Individual Support (Ageing, Home and Community)
- Certificate III in Individual Support (Disability)
- Certificate III in Sterilisation Services
- Certificate IV in Allied Health Assistance
- Certificate IV in Leisure and Health
- Diploma of Nursing
- Health, Aged care and Disability (Short course)
- Introduction to Nursing
- Mental Health First Aid (Short course)
- Working with Children and Adolescents with a Disability (Short course)

Course availability by industry

Vocational education

Building and construction

Courses/ qualifications

Tafe Tasmania

- Certificate II in Building and Construction (Carpentry) Pre-apprenticeship
- Certificate II In Building and Construction (Painting & Decorating)
- Certificate IV in Building and Construction (Building)
- Confined Space Entry
- Construction and Allied Trades (apprenticeships and traineeships)
- Crane Operation (Licenced)
- Licence to erect, alter and dismantle scaffolding basic level
- Licence to operate a boom type elevating work platform (boom length 11 metres or more)
- On-site Training for Machinery, Plant and Equipment
- Operate elevating work platform
- Shift materials safely using manual handling methods
- Work safely in the construction industry (White Card)
- Certificate III in Engineering – Technical
- Certificate IV in Engineering Drafting
- Diploma of Building Design
- Introduction to Building Design
- Introduction to Building Project Management

Secondary Education -School based apprenticeships/traineeships

- Certificate III in Carpentry
- Certificate III in Carpentry and Joinery
- Certificate III in Civil Construction
- Certificate III in Civil Construction Plant Operations
- Certificate II in Engineering
- Certificate III in Engineering
- Certificate III in Flooring Technology
- Certificate III in Wall and Ceiling Lining
- Certificate III in Wall and Floor Tiling

Vocational education

Transport and logistics

Courses/ qualiications

- CERTIFICATE III IN AVIATION (GROUND OPERATIONS AND SERVICE)
- DIPLOMA OF AVIATION (INSTRUMENT FLIGHT OPERATIONS)
- CERTIFICATE I IN MARITIME OPERATIONS (COXSWAIN GRADE 2 NEAR COASTAL)
- CERTIFICATE II IN MARITIME OPERATIONS (MARINE ENGINE DRIVER GRADE 3 NEAR COASTAL)
- CERTIFICATE III IN MARITIME OPERATIONS (INTEGRATED RATING)
- CERTIFICATE III IN MARITIME OPERATIONS (MASTER UP TO 24 METRES NEAR COASTAL)
- SHIPBOARD SAFETY SKILL SET
- CERTIFICATE I IN TRANSPORT AND LOGISTICS (WAREHOUSING AND STORAGE)
- CERTIFICATE I IN TRANSPORT AND LOGISTICS (ROAD TRANSPORT)
- CERTIFICATE I IN WAREHOUSING OPERATIONS
- CERTIFICATE I IN LOGISTICS
- CERTIFICATE II IN TRANSPORT AND LOGISTICS (WAREHOUSING AND STORAGE)
- CERTIFICATE II IN TRANSPORT AND LOGISTICS (ROAD TRANSPORT)
- CERTIFICATE II IN DRIVING OPERATIONS
- CERTIFICATE II IN RAIL INFRASTRUCTURE
- CERTIFICATE II IN STEVEDORING
- CERTIFICATE II IN FURNITURE REMOVAL
- CERTIFICATE II IN WAREHOUSING OPERATIONS
- CERTIFICATE II IN LOGISTICS
- CERTIFICATE III IN TRANSPORT AND LOGISTICS (WAREHOUSING AND STORAGE)
- CERTIFICATE III IN TRANSPORT AND LOGISTICS (ROAD TRANSPORT)
- CERTIFICATE III IN TRANSPORT AND LOGISTICS (RAIL OPERATIONS)
- CERTIFICATE III IN TRANSPORT AND LOGISTICS (LOGISTICS OPERATIONS)
- CERTIFICATE III IN DRIVING OPERATIONS
- CERTIFICATE III IN STEVEDORING
- CERTIFICATE III IN WAREHOUSING OPERATIONS
- CERTIFICATE III IN LOGISTICS
- CERTIFICATE III IN RAIL INFRASTRUCTURE
- CERTIFICATE IV IN TRANSPORT AND LOGISTICS (WAREHOUSING AND STORAGE)
- CERTIFICATE IV IN TRANSPORT AND LOGISTICS (ROAD TRANSPORT)
- CERTIFICATE IV IN TRANSPORT AND LOGISTICS (LOGISTICS)
- CERTIFICATE IV IN TRANSPORT AND LOGISTICS (ROAD TRANSPORT - CAR DRIVING INSTRUCTION)
- CERTIFICATE IV IN WAREHOUSING OPERATIONS
- CERTIFICATE IV IN LOGISTICS
- DIPLOMA OF LOGISTICS
- ADVANCED DIPLOMA OF DEPLOYMENT LOGISTICS

Vocational education

Primary industries

Courses/ qualifications

Dairy

- In-school programs, such as financial management training
- Regional discussion programs and training forums
- The Picasso Cow program – Primary education
- The Cows Create Careers program – Secondary education
- AgriTas – Linked with TasTafe – Smithton
  - AHC20110 Certificate II in Agriculture
  - AHC30110 Certificate III in Agriculture
  - AHC40110 Certificate IV in Agriculture

Wine

TasTafe

- FDF20411 - Certificate II in Wine Industry Operations
- Short Course – Wine Appreciation Class

Vocational education

Primary industries

Courses/ qualifications

Agriculture and horticulture

- ACM20110 Certificate II in Animal Studies
- ACM30110 Certificate III in Animal Studies
- AHC20110 Certificate II in Agriculture
- AHC20310 Certificate II in Production Horticulture
- AHC20410 Certificate II in Horticulture
- AHC20910 Certificate II in Sports Turf Management
- AHC21010 Certificate II in Conservation and Land Management
- AHC21310 Certificate II in Shearing
- AHC21410 Certificate II in Wool
- AHC30110 Certificate III in Agriculture
- AHC30210 Certificate III in Agriculture (Dairy Production)
- AHC30610 Certificate III in Production Horticulture
- AHC30710 Certificate III in Horticulture
- AHC30810 Certificate III in Arboriculture
- AHC30910 Certificate III in Landscape Construction
- AHC31410 Certificate III in Conservation and Land Management
- AHC32010 Certificate III in Beekeeping
- AHC32910 Certificate III in Shearing
- AHC33110 Certificate III in Advanced Wool Handling
- AHC40110 Certificate IV in Agriculture
- AHC40310 Certificate IV in Production Horticulture
- AHC40410 Certificate IV in Horticulture
- AHC40910 Certificate IV in Conservation and Land Management
- AHC50110 Diploma of Agriculture
- AHC50310 Diploma of Production Horticulture
- AHC50410 Diploma of Horticulture
- AHC51110 Diploma of Conservation and Land Management
- AHC51410 Diploma of Agribusiness Management

Additional licenses & training

- First Aid certificate
- Chemical certification
- Forklift license
- Chainsaw license
- Safe Food Handling permit
- Agricultural Spraying permit
- Crop protection permit
- Liquid Trade Waste Consent
- Firearms license
- Occupational health and safety/workplace health and safety certification

Appendix 4: Key stakeholders consulted

Stakeholder engagement strategy

Key stakeholder group	Activity/ consultation approach	Objective of consultation
State Government and local government bodies and RDA Tas	Targeted face-to-face interviews	To test the outcomes of desk-top research and to gather information relating to: 1. Current trends and forces impacting education, training, employment and industry within the regions 2. Current perceptions, gaps, challenges with education, training and the labour market within the regions 3. The current and potential pathways between secondary education, VET and tertiary education to employment 4. Progress on any workforce development initiatives in the regions including sector plans 5. Ideas/ opportunities for improvements in the provision of education, training and employment services
Education, training and employment providers/ facilitators	Telephone interviews (selected face-to-face interviews where practical) Key stakeholder workshop	To test the outcomes of the desktop research and to gather information relating to: 1. The current and potential pathways between secondary education, VET and tertiary education to employment 2. Challenges facing disadvantaged groups (youth at risk, disability, indigenous, long term unemployed etc.) 3. Insights into successful models of RTO/ industry partnerships that enhance training and employment outcomes 4. Ideas/ opportunities for improvements in the provision of education, training and employment services
Industry bodies	Targeted face-to-face interviews Key stakeholder workshop	To test the outcomes of desk-top research and to gather information relating to: 1. Current trends and forces impacting education, training, employment and industry within the regions 2. Current perceptions, gaps, challenges with education, training and the labour market within the regions 3. Ideas/ opportunities for improvements in the provision of education, training and employment services 4. Insights into broader industry demand for workforce and supply constraints 5. Insights into successful models of RTO/ industry partnerships that enhance training and industry outcomes
Major employers	Telephone interviews (selected face-to-face interviews where practical)	To test the outcomes of the desktop research and to gather information relating to: 1. Workforce issues facing the enterprises today – quality, quantity etc. 2. Current approaches to sourcing labour – strengths and weaknesses 3. Current industry engagement with the vocational education and training sector in the regions – strengths and weaknesses 4. Planned enterprise demand for workforce having regard to future commitment and plans 5. Insights into broader industry demand for workforce and supply constraints 6. Insights into successful models of RTO/ industry partnerships that enhance training and industry outcomes

Key common stakeholders

Segment	Organisation	Name	Engagement
Education and Training	Department of Education	Lesley Richardson	Interview
	Skills Tasmania	Jeremy Rose/ Linda Seaborn/ Anna Carew*	Interview/ workshop
	TasTAFE	Lori Hocking/ Nick May	Interview/ workshop
	Department of Education - Trade Training Centres - State-wide	Stuart Harvey	Interview/ workshop
	Department of Education - Trade Training Centre -Bridgewater	Traycee diVirgilio	Interview/ Workshop
	Department of Education - Trade Training Centres-Bridgewater	Sandy Menadue	Interview
	Chair Management Committee, Trade Training Centre-Bridgewater	Mike Frost	Workshop
	Industry Link	Tony Kennedy	Interview
Employment Support	Work Skills	Matthew Dance	Interview
	YourTown (Max Employment)	Michael Starr	Interview
	Beacon Foundation	Nick Probert	Interview
	Huon Valley Works	Jenni Bellette/ Chris Devenish	Interview

** Also on project Steering Committee.*

Key common stakeholders

Segment	Organisation	Name	Engagement
Industry bodies	Aged and Community Services Tasmania	Lee Veitch	Interview
	National Disability Service (NDS)	David Clements	Interview
	Tasmanian Building and Construction Industry Training Board	Simon Cocker	Interview
	Tasmanian Transport & Logistics - Workforce Advisory Group	Robin Phillips	Interview
	Tourism Industry Council	Luke Martin	Interview
	Destination South	Melinda Anderson	Interview
	Tas Hospitality Association	Steven Long	Interview
	Dairy Tasmania	Mark Smith	Interviews
	Wine Industry Tasmania Ltd	Sheralee Davies	Interview
	Tasmanian Seafood Council	Julian Harrington	Interview
	Fruit Growers Tasmania	Phil Pyke	Interview
	Oysters Tasmania	Neil Stump	Interview
	Regional Development Australia (Tas)	Jen Newman	Interview/ workshop

The Tasmania Farmers and Graziers Association were not able to be contacted. Review of workforce development plans and consultation with the sub-sectors was considered to provide sufficient coverage for this study

Key SCS Stakeholders Consultations

Segment	Organisation	Names	Engagement
Local Government	Brighton Council	James Dryburgh*	Workshop
	Central Highlands Council	Lyn Eyles	Workshop
	Derwent Valley Council	Cr Martyn Evans Greg Winton	Workshop
	Southern Midlands Council	Andrew Benson*	Workshop
Employers	SRT Logistics	Joanne Tye	Interview
	St Ann's Homes	Jason Binder	Interview
	Corumbeen	Damian Jacobs	Interview/ workshop
	Midlands MPHS	Sandy Carmichael	Interview
	TasRail#	Jen Jarvis	Interview
	Norske Scog	Christine Hooper	Interview/ workshop
	Houston's Farm (also SERDA)	David Nelan	Interview
	Moo Brew	Dave McGill	Interview
	Inland Fisheries	John Diggle	Interview

*#Limited discussion as scope of study was not seen as relevant * Also on Project Steering Committee*

Appendix 5: Regional workshop outputs

Workforce issues

Industry and education alignment

1. Students finishing school are lacking certain skills which are useful in the workplace
2. Disconnect between industry needs and education
3. Attracting young people into the industry (Norske Skog) and ageing workforce*
4. Work ethic is sometimes not strong and this improves with school based apprenticeships
5. Changes in the dairy industry have created new roles for middle management (would have once been owner operated)

Regional location challenges

1. Health and wellbeing challenges in areas with low SES, low education, regional isolation*
2. Downturn of forestry had a big impact; a fragile region is susceptible to the movements in industry*
3. Technological advancements in aged care are changing the industry and allowing more people to stay at home longer; more about wellbeing now*
4. Challenges arising from generational disadvantage in some remote regions
5. Connectivity to phones/ internet on around the Central Highlands*
6. Issues with access and transport in remote locations to get to training and work – need to have more input into transport reviews
7. Community services that are needed are not necessarily available in the area, which can contribute to people seeking these elsewhere

Training and employment barriers

1. Low enrolments can make local training difficult to manage
2. Difficulties enabling staff to attend training courses in order to up-skill
3. Some of the summer picking workforce would like to camp but there are limited spaces; need improved accommodation options for seasonal workers

*Note that this also includes some of the points raised at the SERDA workshop, but are likely to have similar applicability to the SCS region. Matters specifically raised that are more unique to the SCS region are marked with a **

Workforce development opportunities

Industry and education alignment

1. Tassal hatcheries have around 20 positions and encourage students to visit the site to understand the process and consider a career*
2. Engage employers with teachers and the education system to explain careers and industries available locally
3. Promote school based apprenticeships to businesses in the region and widen their application to more industries
4. Invite local employers to an industry night to promote school based apprenticeships
5. Opportunities in heritage restoration specialisations*

Education and training

1. Conduct employer training in order to increase attraction and retention, and train the trainers
2. Conduct interview and CV writing workshops to assist potential employees
3. New roles with the introduction of the NDIS; opportunities for collaboration, blended jobs with other industries*
4. NDIS may drive services into regional areas as clients will be able to choose their provider and likely stay at home longer*
5. Promote associate degrees, which can develop students to be more ‘work ready’ in tandem with TasTAFE*
6. Look at the models being developed by Burnie City Council*

Community development

1. Tourism in the region is growing with opportunities to develop the Central Highlands ‘corridors’ with fishing guides, story telling etc*
2. Centacare are developing housing in the Gagebrook, Bridgewater and Herdsmans Cove areas and aiming to use younger people as part of their training*
3. Councils could consider land releases to allow for lost cost housing but balance this with maintaining the heritage of the area*
4. Maximise the skills in the region to create businesses/ new developments rather than relying on people from out of area to drive opportunities
5. Role modelling of success stories in the local region

*Note that this also includes some of the points raised at the SERDA workshop, but are likely to have similar applicability to the SCS region. Matters specifically raised that are more unique to the SCS region are marked with a **

Next Steps

Establish a governance model to progress implementation of the study findings

1. Establish a clear understanding of roles and responsibilities of the different stakeholders- training, labour hire, employment,
2. Governance model can be guided by SERDA but needs to be community driven*
3. Ensure involvement of Jordan River Learning Federation and other educational institutions as required
4. UTAS and TasTAFE could be involved in the governance model
5. Investigate a regional job seeker business model/ portal (along the lines of Huon Valley Works)

Improve connection between industry and education

1. Engage with Principals and schools to discuss approaches
2. Conduct a local job expo to show case careers, role models, promote employers, match job seekers
3. Bring local business leaders into classrooms to educate students on local careers and industries
4. Take students and teachers out of the classroom on excursions to see the operations and learn on site
5. Open day for teachers to engage them in the careers they can promote to students and link to their learning
6. Encourage further work placement opportunities for students
7. Leverage the Beacon Foundation to facilitate the relationship between industry and education

*Note that this also includes some of the points raised at the SERDA workshop, but are likely to have similar applicability to the SCS region. Matters specifically raised that are more unique to the SCS region are marked with a **

Appendix 6: Industry focus areas

Sector focus areas

The study will focus on industry sectors that are of greater relevance to the SERDA and SCS regions. Regional workforce development plans have had regard to any sector plans already in place

Industry sector	Relevance to SERDA (H,M,L)	Relevance to SCS (H,M,L)	Key sector peak body/ stakeholder	Sector Workforce Plan Yes/ No
Health, aged and disability care	H	H	Aged and Community Services Tasmania (ACST), National Disability Service (NDS)	**Yes**
Building and construction	H	H	Tasmanian Building and Construction Industry Training Board (TBCITB)	**Yes**
Transport and Warehousing	H	H	Tasmanian Transport & Logistics - Workforce Advisory Group (TTLWAG)	**Yes**
Tourism and hospitality	H	H	Tourism Industry Council (TIC), Destination South (DS), Tas Hospitality Association (THA)	**Yes**
Dairy	H	H	Tasmanian Farmers and Graziers Association TFGA) , Dairy Tasmania (DT)	**Yes**
Fruit	H	H	Tasmanian Farmers and Graziers Association	**Yes-Skill needs**
Vegetables	H	H	Tasmanian Farmers and Graziers Association	No
Wine	H	M	Wine Industry Tasmania Ltd	Yes
Salmon	H	M	Tasmania Salmon Growers Association	No
Red meat	M	M	Tasmanian Farmers and Graziers Association	No
Advanced manufacturing	M	M	Tasmanian Minerals and Energy Council (TMEC)	No
Forestry and related industries	M	M	Forestry Industry Association of Tasmania (FIAT), See also ARBRE Training and Career Hub	No
Information, communications and technology	M	M	Tas ICT	**Yes**
International education	M	M	University of Tasmania (UTAS), TasTAFE	No
Antarctic and Southern Ocean	M	L	Tasmanian Polar Network (TPN)	No
Mining and mineral processing	L	L	Tasmanian Minerals and Energy Council	No
Poppy	L	L	Tasmanian Farmers and Graziers Association	No
Renewable energy	L	L		No
Science research	L	L		No

Appendix 7: Current skills shortages

Australian Government Department of Employment, Tasmania, 2016

Known skills shortage 2015-16

Only 25% of vacancies in child care centres were filled in regional Tasmania

Graduates are reluctant to relocate to Tasmania after studying on the mainland

Occupation	Comment
Early Childhood (Pre-primary School) Teacher Difficulty recruiting	Survey results — All early childhood (kinder to grade two) vacancies in schools were filled, while only 25% of vacancies in child care centres were filled. The majority of applicants that did apply to childcare centres were deemed unsuitable as they did not have relevant qualifications or experience — Key reasons for low applications include lower wages and less attractive working conditions compared to positions in schools Demand and supply trends — Demand for child care services has increased by almost 1.3% since 2013 — Employment in the education and training industry has decreased by 10.5% since 2015 — In 2016 the minimum age for Prep was decreased to 4.5 years, which has increased demand for early childhood teachers in schools
Sonographer Regional Shortage	Survey results — 50% of vacancies were filled in regional Tasmania. All applicants were internal — Employers suggested most applicants preferred short-term, higher wage positions rather than permanent salaried positions. They also believe the lack of post-graduate university qualification opportunity plays a large role as graduates do not want to relocate to Tasmania Demand and supply trends — Demand for sonographers is greatly influenced by the ageing population. The amount of Tasmanians over 65 years increased by 18.2% since 2009. The median age of the Tasmanian population at June 2014 was 41.5 years, which is the highest in Australia — In 2014-15 FY there was a 13% increase in diagnostic imaging services since 2013-14 FY — There are only 9 accredited educational institutions in Australia that offer post-graduate training in sonography, none of which are in Tasmania. However, all 9 offer distance study which require concurrent clinical training in a workplace
Occupational Therapist State-wide shortage	Survey results — In early 2016 50% of vacancies were filled. In 2015, no vacancies were filled — In the aged-care sector most positions offered weren't permanent and the wages are not as competitive as other sectors meaning it was difficult to find applicants — Lack of applicants likely to be because of the inability to study the occupation in the state and a lack of desire to relocate to Tasmania once qualified Demand and supply trends — Employment in health care has grown 23.2% since 2006 — There has been a 10.3% increase on the number of occupational therapists since 2015 — Lack of supply may also be due to the high proportion (92.1%) of females working in the occupation

Known skills shortage 2015-16

Only 30% of physiotherapist vacancies were filled in regional Tasmania

In 2015, no vacancies for first class metal machinists were filled in Tasmania

Occupation	Comment
Physiotherapist **Shortage in regional areas**	Survey results — Only 30% of vacancies in regional areas were filled, with most of these being interstate applicants in a junior role. Applicants had less experience than desired — Most vacancies that remain unfilled are in the aged-care sector which suggests it is less attractive than other sectors — Lack of applicants likely to be because the study for physiotherapy is interstate and many new graduates do not relocate to Tasmania due to lower wages Demand and supply trends — Demand for physiotherapists has increased due to an increased ageing population — Lack of supply may also be due to the high proportion (76.4%) of females working in the occupation — Between 2006-2010 70.2% of arriving physiotherapists were from interstate and 29.8% were from overseas
Sheetmetal Trades Worker **Recruitment difficulty**	Survey results — In early 2016, 71% of all vacancies were filled, compared to 38% in 2014 — The vacancies remaining unfilled are positions which sought specialist experience with stainless steel — Many qualified tradespeople move to the mainland for more opportunity and higher wages Demand and supply trends — Employment in the manufacturing industry decreased by 12.2% from 2014-2015 — Industry projections from 2014-2019 show a 4.4% decrease in employment in the manufacturing industry — Apprentices obtain a Certificate III in Engineering – Fabrication Trade. The number of apprentices commencing and completing the certificate decreased by 43% and 35.3% respectively
Metal Machinist (First Class) **State-wide shortage**	Survey results — In 2015 no vacancies were filled, compared to all vacancies being filled in 2014. No applicants in 2015 were deemed suitable as they did not hold necessary qualifications — Employers suggested the reason for the shortage was low wages and low opportunity compared to other trades Demand and supply trends — The number of apprentices commencing and completing the certificate decreased by 32.3% and 35.5% respectively — Industry projections from 2014-2019 show a 4.4% decrease in employment in the manufacturing industry — Apprentices obtain a Certificate III in Engineering – Mechanical Trade. The number of apprentices commencing and completing the certificate decreased by 32.3% and 35.5% respectively

Known skills shortage 2015-16

Only 20% of panelbeater vacancies were filled in Tasmania

Building approvals have increased by 33.7% since 2014 increasing the demand for bricklayers

Occupation	Comment
Panel beater **State-wide shortage**	Survey results • In 2015 20% of vacancies were filled, compared to 67% in 2014 • Employers suggest this is due to low wages and a lack of opportunity • The majority of work comes from accident insurance claims meaning employers are restricted in their spending to remain profitable whilst the insurance company dictates the price structure • Some employers have developed an academy for early school leavers and job seekers which provides an 8-12 week course Demand and supply trends • Since 2014 there has been a 4.9% decrease in motor vehicle accidents which are the main demand for panelbeaters • Since 2014 employment in the automotive repair and maintenance industry increased by 9.1% in Tasmania • Apprentices obtain a Certificate III in Automotive Body Repair Technology. The number of apprentices commencing and completing the certificate decreased by 51.5% and 17.2% respectively
Vehicle Painter **State-wide shortage**	Survey results • In 2015 20% of vacancies were filled • Key reasons include low wages and lack of opportunity • The majority of work comes from accident insurance claims meaning employers are restricted in their spending to remain profitable whilst the insurance company dictates the price structure Demand and supply trends • Since 2014 there has been a 4.9% decrease in motor vehicle accidents which impacts demand for vehicle painters • The number of apprentices commencing and completing the certificate decreased by 51.5% and 17.2% respectively.
Bricklayer **State-wide shortage**	Survey results • 40% of vacancies were filled in 2015 with only half of those being qualified. This compares to 100% in 2014 • Employers suggested this is due to increased construction work around the state meaning the suitably qualified applicants are otherwise employed. It was also suggested there is a decrease of specialisation such as chimney building Demand and supply trends • Most of the supply for the occupation comes from apprentices obtaining a Certificate III in Bricklaying/Blocklaying. The number completing the certificate increased by 57.1% • Over one-third of bricklayers in Tasmania are 50 years or older suggesting a shortage may occur as the older generation of bricklayers retire • Building approvals have increased by 33.7% since 2014 creating more demand for bricklayers • Industry projections show an 8.5% employment growth for the construction industry

Known skills shortage 2015-16

No vacancies for fibrous plasterers were filled in 2015 in Tasmania

All vacancies for butchers and smallgood makers remain unfilled in regional Tasmania

Occupation	Comment
Fibrous Plasterer **State-wide shortage**	Survey results • No vacancies were filled in 2015, compared to 64% filled in 2014 • Employers emphasised they were looking for experienced workers only, which is where the shortage lies Demand and supply trends • Over the last year building approvals have increased by 33.7% • Between 2014 and 2015 employment in the construction industry decreased by 8.6%; however industry projections show an 8.5% employment growth for the construction industry • Most of the supply for the occupation occurs from apprentices obtaining a Certificate III in Wall and Ceiling Lining. The number of apprentices completing the certificate has decreased by 20.4%
Butcher or Smallgoods Maker **Shortage in regional areas**	Survey results • All vacancies in regional areas remain unfilled. Applications received were qualified but lacked motivation, speed and skill. Applicants also sought higher wages • Some small good applicants did not have necessary skills such as sausage making Demand and supply trends • Between 2014 and 2015 employment in the food retailing industry increased by 25.7% • Most of the supply of the occupation comes from apprentices obtaining a Certificate III in Meat Processing. The number of apprentices commencing and completing the certificate decreased by 50% and 22.2% respectively
Chef **Shortage in regional areas**	Survey results • The number of vacancies filled was 33%. • Key reasons include low wages, unsocial hours and high pressure in the occupation. • Employers were willing to hire unqualified applicants if they had suitable experience • Employers indicated the number of available chefs will decline with the current increase in the number of restaurants opening Demand and supply trends • From 2014 to 2015, employment in the accommodation and food services industry increased by 1.3%. industry projections from 2014-2019 show an 8.5% employment growth for the accommodation and food services industry • The number of apprentices completing the certificate has decreased by 15.5% and two-thirds of those leaving the certificate do not complete it. The number of apprentices commencing the certificate has increased by 14.4%

KPMG

Appendix 8: Endorsed RTO list 23 November 2016

Endorsed Tasmanian RTO listing as at 23 November 2016

21791	1 to 1 Beauty Therapy Training	Full	
90867	Access Group Training	Full	
40676	Action Learning Institute	Full	
5800	Alan Bartlett Consulting Pty Ltd	Full	
60053	Alzheimer's Australia - Tasmania, Education Service	Full	
31424	Animal Industries Resource Centre	Full	
90294	Applied Training Solutions Pty Ltd	Full	
4049	ARA Retail Institute	Full	
3562	Arbortrim Australia Pty Ltd	Specialist	Forestry, Tree Management and related skills
4874	Ascent Training Group	Full	
20749	Ashley Institute of Training	Full	
60083	Asset Training	Full	
1441	Australian College of Commerce & Management Pty Ltd	Full	
21912	Australian Employment and Training Solutions Pty Ltd	Full	
2543	Australian Employment Services	Full	
3591	Australian Industrial Trainers, Assessors & Consultants (AITAC) Pty Ltd	Specialist	AJL Heavy Machinery - all scope
0049	Australian Institute of Management Education and Training	Full	
32363	Australian Institute of Personal Trainers Pty Ltd	Specialist	Certificate III and IV in Fitness
60131	Australian Maritime College	Full	
52217	Australian Mines and Metals Association Incorporated	Full	
40736	Australian Nursing and Midwifery Federation (Tasmania Branch)	Full	
3605	Australian Red Cross Society	Full	
88146	Australian Vocational Training Academy	Full	
60153	Avidity Training and Development	Full	
3077	Bendigo Kangan Institute	Full	
4687	Box Hill Institute	Full	
41045	Brighter Futures Australia	Specialist	Employment Services (in partnership with Campbell Page)
21583	Builders Academy Australia	Specialist	Construction (CSR Bricks and Roofing, Bowens and Haymes Paints)
60162	Campbell Page Employment and Training	Full	
90400	Centre for Training in Social Housing	Full	
21356	CLB Training and Development Pty Ltd	Full	
3752	DeakinPrime	Specialist	Banking and Finance (Westpac Banking only)
31888	Developing Personnel Training and Consultancy	Full	
60155	Devon Training and Employment Service	Full	
1123	Driver Safety Services	Full	
51971	Engineering Institute of Technology	Full	
40680	Entura clean energy and water institute	Full	
22101	Fire Industry Training Pty Ltd	Full	
0826	First Impressions Resources, The Australian Retail College	Full	
6333	Flexible Training Solutions Pty Ltd	Full	

Endorsed Tasmanian RTO listing as at 23 November 2016

22557	Foundation Education Pty Ltd	Full	
7134	Franklyn Scholar	Full	
21793	Global Fitness Institute	Full	
60058	GLOBALNET ACADEMY PTY LTD	Full	
32215	Goodstart Institute of Early Learning	Full	
4436	Gowrie Training Centre	Full	
21567	Graduate Business School	Full	
60134	Handa Training Solutions	Full	
0416	Holmesglen Institute	Full	
1091	Housing Industry Association Ltd	Full	
31678	Human Resource Training	Full	
40122	Humanagement/Print Training Australia/Humanagers	Full	
4011	ICP Educational Institute	Full	
60003	Independent Health Care Service Pty Ltd	Full	
40123	Independent Institute of Food Processing	Specialist	Bakers Delight
40460	Industry Delivered Training	Specialist	Aviation industry
60177	Industrylink Training	Full	
60154	Institute of Project Management	Full	
21099	Intercare Training	Specialist	BUPA
21055	Interlink Training	Full	
21122	International Institute for Professional Development	Full	
40541	International Skills Institute	Full	
60036	Island Health College	Full	
90277	JB Hunter Technology	Full	
88185	JCE Positive Outcomes	Full	
0763	Jenard Training & Personnel	Full	
90116	Kaplan Education Pty Ltd	Full	
91014	KFC	Full	
91450	LDCT Laundry Dry Cleaning Training	Full	
3908	Leadership Management Australia Pty Ltd	Full	
3397	Learning Partners Pty Ltd	Full	
91055	Life Without Barriers	Full	
90748	Major Training Services	Full	
3930	Marjorie Milner College	Full	
0646	Master Builders Association (SA) Inc.	Full	
1685	Matters in Gray	Full	
0667	Max Solutions	Full	
90820	McDonald's Australia Ltd	Full	
3945	MEGT Institute	Full	

Endorsed Tasmanian RTO listing as at 23 November 2016

6859	Milcom Communications Pty Ltd	Specialist	NBN provision
3974	Murray Mallee Training Company Ltd	Full	
3821	National Food Industry	Full	
60156	National Joblink	Full	
21254	National Training Services Pty Ltd	Specialist	Gas Industry
60034	NDA Computing Pty Ltd	Full	
22214	Nepean Industry Edge Training	Specialist	Hospitality Industry
90140	NIBA College of Insurance & Risk Professionals	Full	
3075	Northern Melbourne Institute of TAFE	Full	
1098	Oak Training and Development Services	Full	
60071	OnRoad OffRoad Training	Full	
60072	Orange Vocational Education and Training	Full	
40672	Orkut College of Management	Full	
50713	ORS Training Solutions	Full	
40715	Outside the Square Solutions	Full	
1412	Papillon Academy of Beauty Therapy	Full	
0195	PARTEC Institute	Full	
1454	Pelion Consulting	Full	
21101	Performance Partners Consulting Pty Ltd	Full	
122206	Pharmaceutical Society of Australia	Full	
121391	Pragmatic Training Pty Ltd	Full	
90933	Ramsden Telecommunications Training	Full	
30879	Response Learning	Full	
32326	RII Skills Centre	Full	
90133	Riverina Community College	Specialist	Aged Care Industry
90005	Riverina Institute of TAFE	Specialist	Environment, Forestry & Primary Industries
3046	RMIT University	Full	
32279	Rocky Safety Consultancy	Full	
90546	Royal Rehab	Full	
90782	RuralBiz Training	Full	
60168	Scala Institute	Full	
7074	Seafood Training Tas	Full	
40049	Silver Chain Training	Full	
60144	Singleton Consulting and Training	Full	
4192	Skillinvest	Specialist	Racing Industry (TasRacing)
60047	Southern Cross Care (Tasmania) Inc	Full	
91162	Southern IML Pathology	Full	
91378	Southern Training Organisation Pty Ltd	Specialist	Forestry and Civil Construction Industries
60067	St Michael's Association Inc	Full	
60013	State Enterprise Training	Specialist	

Endorsed Tasmanian RTO listing as at 23 November 2016

60080	Stepping Ahead Training and Development	Full	
91054	Tactical Training Group Pty Ltd	Full	
90006	TAFE NSW - Illawarra Institute	Full	
31396	TAFE Queensland SkillsTech	Full	
41026	TAFE SA	Specialist	Aviation and Printing (Approved where there is a gap in the market)
60105	Tasmanian Aboriginal Centre Inc	Full	
40937	Tasmanian Health Service	Full	
60100	Tasmanian Secondary Colleges	Full	
1128	TasNetworks	Full	
60142	TasTAFE	Full	
4132	TFIA Business Services Pty Ltd	Specialist	Choices Flooring in the delivery of Certificate III in Flooring Technology
31506	The Improve Group	Full	
0452	The Pharmacy Guild of Australia National Secretariat	Full	
0412	The Real Estate Institute of Tasmania	Full	
60101	The Training & Business Company	Full	
4168	Timber Training Creswick Ltd	Full	
20814	Tractor	Specialist	Graphic Design
60082	Training Services Tasmania	Full	
40118	Transport Training Solutions	Full	
90388	Transqual Pty Ltd	Full	
3363	TransTrain	Full	
70217	Triple O Solutions	Full	
4236	Trison Business College	Full	
6754	UNE Partnerships	Full	
7039	United Transport Solutions	Specialist	Transport
21747	Water Training Australia	Specialist	Approved for activity associated with Tasmanian Irrigation.
3045	William Angliss Institute	Full	
91447	Wise Education Group	Specialist	Hungry Jacks
6653	Wise Training	Specialist	Disability sector
3097	Wodonga Institute of TAFE	Full	
90688	Woolworths Ltd	Full	
1126	Work & Training Limited	Full	
60103	Workforce Development	Full	
31384	Workskills	Specialist	Approved as preferred provider for MEGT to deliver to Beaurepaires
22394	X-Seed Education and Development	Full	
60164	Youth Futures	full	

Appendix 9: Endorsed Job Network Providers

Endorsed Job Active Providers

Name	Description	SERDA	SCS
Advanced Personnel Management (APM)	APM is an Australian owned provider of sustainable employment solutions. Our goal is to achieve faster employment for Jo b Seekers, make it easier for Employers to meet their workforce needs, and provide more options to connect Employers and Job Seekers APM is Australia's largest private provider of employment services for people with an injury, illness or disability.	X	X
Workskills Incorporated		X	X
Epic Employment		X	
Wise Employment	WISE Employment empowers job seekers to find meaningful work and become self-sufficient. Our passionate staff assist over 10,000 people into jobs annually. We empower employers to find the right staff from diverse backgrounds. We believe the entire community is enriched when everyone is supported to achieve their potential.	X	X
Colony 47		X	X
BlueLine Employment		X	X
Max Employment	MAX Employment has established a reputation for being a highly effective, placement focused employment services provider . MAX utilises an integrated model of highly trained Placement Consultants, Allied Health Professionals and Trainers to ensure our clients are provided with the best possible support to achieve sustainable employment outcomes	X	X
Mission Providence			
Headway Rebuilding Lives			
Lifestyle Solutions			

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