



# DPI YOUNG FARMERS SURVEY REPORT

Young Farmer Business Program

NSW Department of Primary Industries

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Prepared for the NSW Department of Primary Industries

16 October 2017

17 021 DPI Young Farmers Survey

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## KEY FINDINGS

Key findings from the DPI Young Farmers survey include:

- Survey respondents came from 65 NSW Local Government Areas (LGAs).
- The large majority (82 percent) of survey respondents were 18 – 34 years old.
- Survey respondents were 45 percent female and 55 percent male.
- Beef, sheep meat, cropping, wool and mixed farming were the five most common agricultural industries survey respondents plan to work in, or are currently working in.
- A very high level of respondents (73 percent) are experiencing barriers entering the business of agriculture.
- Interestingly, 54 percent of respondents agree (combined percentage of 'Agree' and 'Somewhat agree' responses) that they are very confident making business decisions, but only 38 percent think they have a very high level of business skill and knowledge. This suggests a mismatch between confidence and business skill/knowledge.
- Respondents provided a very strong positive response to all proposed learning opportunities, with the top two areas of interest including financial management and business planning.
- Top four 'Very useful' responses relate to financial management; business planning; enterprise analysis and benchmarking; and young farmer coaching and mentoring program.
- The large majority of respondents (72 percent) preferred a mixed mode of learning, including online and face-to-face.
- Respondents advised that they were likely to use a 'one-stop-shop' website for business information.
- When asked 'How likely are you to use the following online resources for your farm, or future farm business?', the top two 'Very likely' responses relate to 'Links to farming business services, current research, funding & investor opportunities' and 'Downloadable farming business templates and tools'.
- When asked if they were willing to participate in further interviews, 49 percent (98 respondents) advised that they would be willing.

## INTRODUCTION

The Young Farmer Business Program was jointly developed by the NSW Department of Primary Industries (DPI) and NSW Farmers, with the goal of increasing the number of young people engaged in the business of agriculture across NSW. In 2016, DPI conducted a survey to identify the barriers and support needed by young farmers entering or expanding in to the business of agriculture.

WRI was engaged to develop a 2017 survey and provide an analysis of responses and summarized reporting of the key themes and issues arising amongst young farmers across NSW. This report provides a summary of survey feedback.

## METHODOLOGY

### Questionnaire Design

WRI developed and deployed a questionnaire in collaboration with DPI to provide feedback on a number of key issues:

- Key training needs.
- Online presence.
- Networking and collaboration to gain competitive advantage.
- Identifying and understanding business problems young farmers currently face.

The survey was approved by DPI prior to commencement.

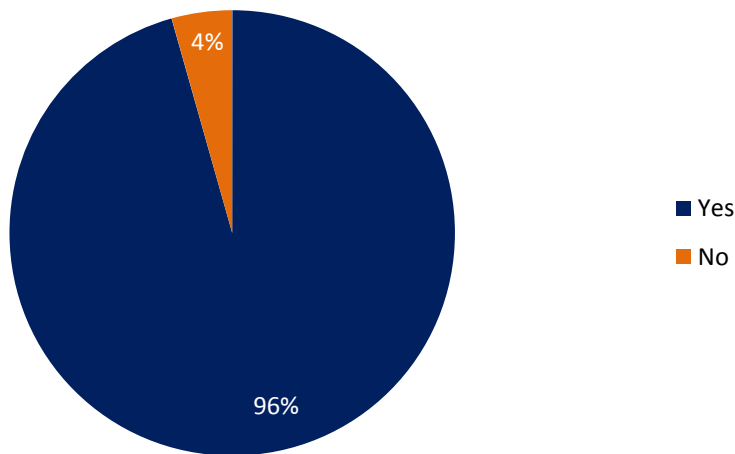
### Survey Mode

The survey was deployed online via WRI's SurveyMonkey subscription and survey recruitment was managed by DPI. The survey was opened by 251 respondents, with 200 of these respondents completing question 13 (the last mandatory question). This means that 51 respondents started but did not complete all questions in the survey. This drop-off in survey responses is common when undertaking community surveying.

## SURVEY RESULTS

DPI Young Farmer Survey respondent feedback has been included below, including relevant analysis and commentary.

### Q1 Do you live in New South Wales?



#### Insights and commentary

- 251 respondent answers.
- Respondents who answered 'no' to this question were filtered out.

### Q2 What is your postcode?

Survey respondents provided their postcode. These postcodes have been analysed and listed below.

LLS Region	Local Government Area	Number of Respondents	Percentage
Central Tablelands	Bathurst Regional	4	1.8%
	Blayney	5	2.3%
	Cabonne	8	3.7%
	Cowra	4	1.8%
	Lithgow	1	0.5%
	Mid-Western Regional	3	1.4%
	Weddin	2	0.9%
Central West	Coonamble	2	0.9%
	Bogan	3	1.4%
	Forbes	4	1.8%
	Gilgandra	5	2.3%

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	Warrumbungle Shire	6	2.7%
	Wellington	1	0.5%
	Dubbo Regional	0	0.0%
Greater Sydney	Camden	1	0.5%
	Campbelltown	1	0.5%
	Inner West	1	0.5%
	Northern Beaches	2	0.9%
	Sydney	2	0.9%
Hunter	Cessnock	1	0.5%
	Central Coast	1	0.5%
	Dungog	2	0.9%
	Maitland	2	0.9%
	Mid-Coast	8	3.7%
	Muswellbrook	3	1.4%
	Port Stephens	2	0.9%
	Upper Hunter Shire	6	2.7%
Murray	Albury	2	0.9%
	Berrigan	7	3.2%
	Edward River	9	4.1%
	Federation	3	1.4%
	Greater Hume Shire	9	4.1%
	Snowy Valleys	1	0.5%
North Coast	Ballina	6	2.7%
	Byron	3	1.4%
	Clarence Valley	8	3.7%
	Kyogle	3	1.4%
	Port Macquarie-Hastings	1	0.5%
	Tweed	1	0.5%
North West	Gunnedah	8	3.7%
	Gwydir	7	3.2%
	Moree Plains	1	0.5%
	Tamworth Regional	2	0.9%
	Walgett	2	0.9%
Northern Tablelands	Armidale Regional	10	4.6%
	Uralla	1	0.5%
Riverina	Bland	4	1.8%
	Coolamon	2	0.9%
	Griffith	2	0.9%
	Gundagai	4	1.8%
	Hilltops	8	3.7%
	Lockhart	3	1.4%
	Murrumbidgee	2	0.9%

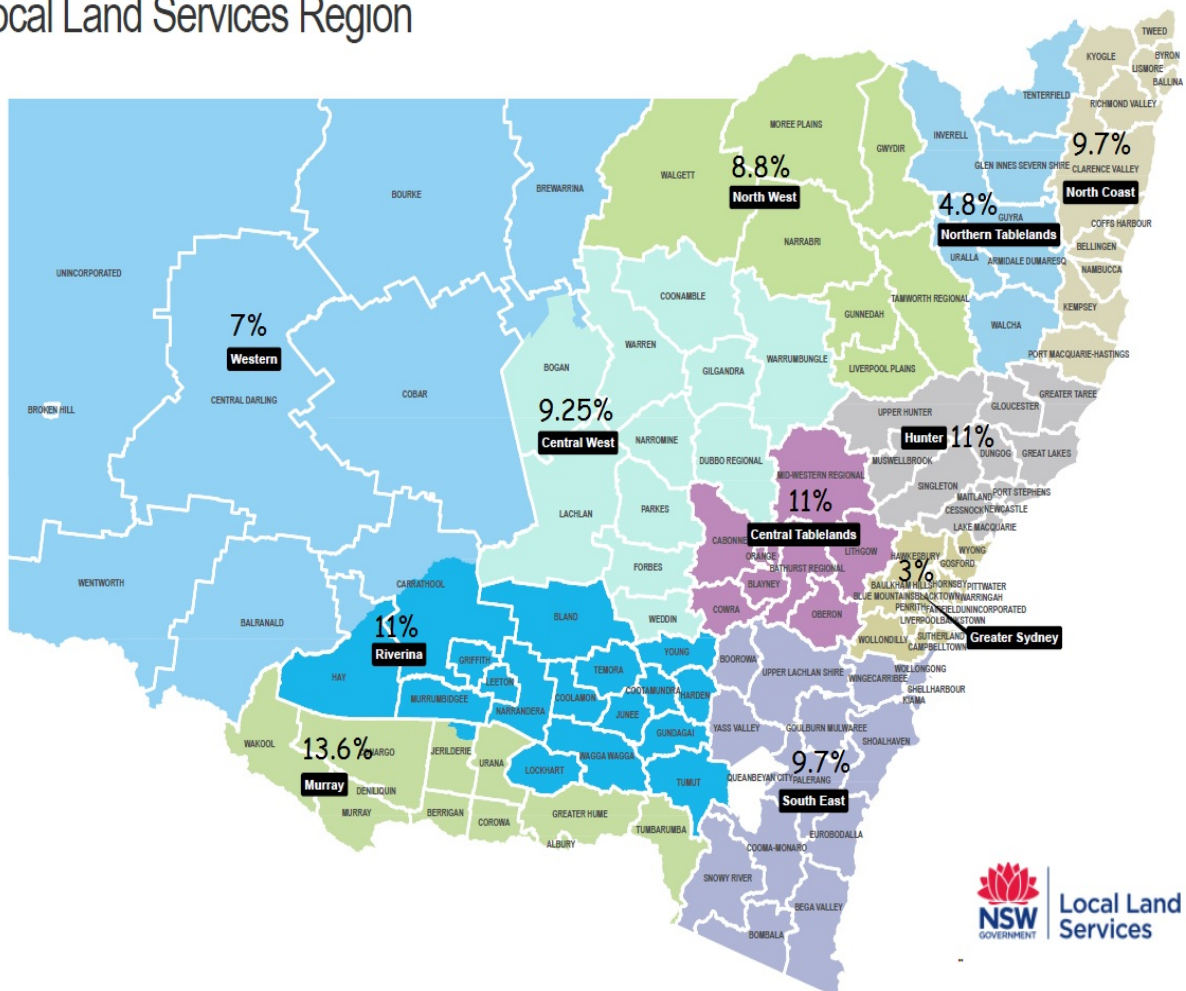
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South East	Bega Valley	3	1.4%
	Eurobodalla	3	1.4%
	Goulburn Mulwaree	6	2.7%
	Kiama	6	2.7%
	Queanbeyan-Palerang Regional	1	0.5%
	Shoalhaven	1	0.5%
	Snowy Monaro Regional	1	0.5%
	Wollongong	1	0.5%
Western	Balranald	5	2.3%
	Bourke	2	0.9%
	Broken Hill	1	0.5%
	Carrathool	8	3.7%
	<b>Total</b>	<b>227</b>	<b>100.0%</b>

Note: The count of postcode responses is slightly lower than expected as some respondents miss-keyed and entered in an invalid response. Alignment between LLS regions and LGAs may include some discrepancies due to the availability of data on region alignment.

## Respondent Location by Local Land Service (LLS) Region

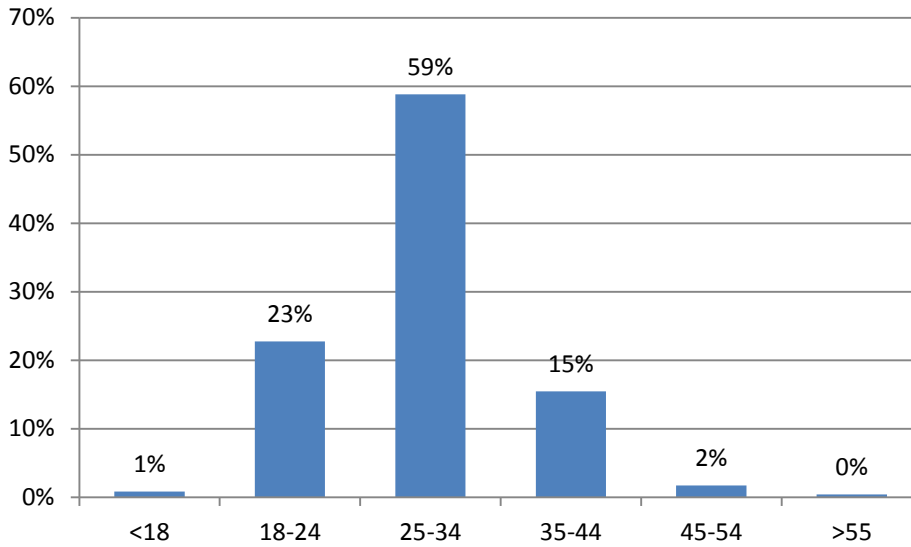
### Local Land Services Region





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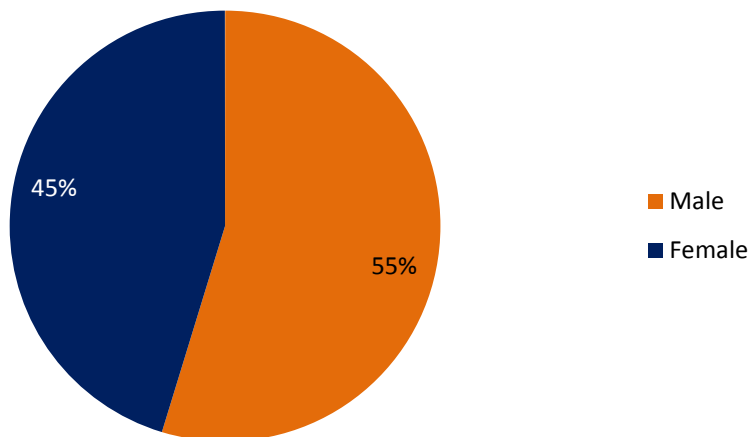
## Q3 What is your age?



### Insights and commentary

- 233 respondent answers.
- Majority in the 25-34 age group.

## Q4 What is your gender?

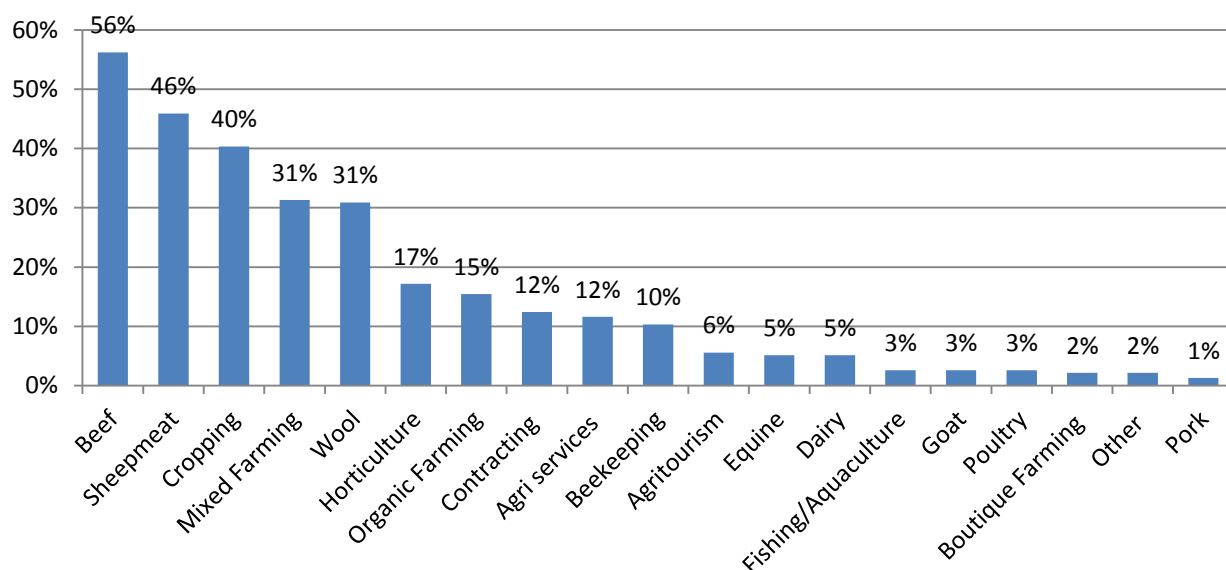


### Insights and commentary

- 233 respondent answers.
- 127 male, 105 female and 1 did not wish to disclose.

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## Q5 What industry/industries are you farming in or planning to farm in?



### Insights and commentary

- 233 respondent answers.

Of the above respondents who nominated the agricultural industries they would be involved in, a large number advised they would be operating in multiple agricultural industries. The table below breaks down the number of respondents that advised they are/intend to operate in one or more industries.

### Respondents operating in one or more industries

Number of Industries	Number of Respondents	Percent of Respondents
1	61	26.2%
2	38	16.3%
3	48	20.6%
4	40	17.2%
5	27	11.6%
6	15	6.4%
7	4	1.7%
8	0	0.0%
9	1	0.4%
		Total respondents = 233

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Respondents who answered 'other' in question five were given the opportunity to advise what that 'other' industry was. Respondent answers have been provided below.

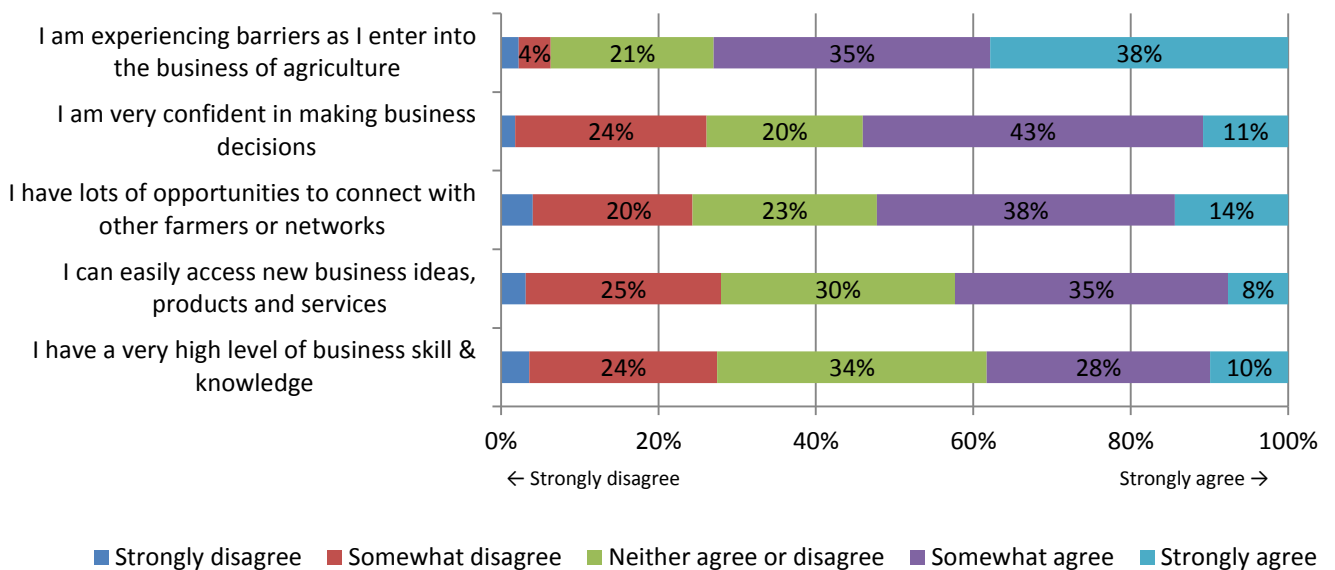
- Donkey
- Paddock to plate
- Permaculture
- Timber

## Q6 If you are involved in Boutique Farming, please specify the type you are farming in or planning to farm in.

Six responses were received to this question, including:

- Free range pork, paddock to plate
- Indoor agriculture
- Looking to start specialty branded honey
- Pastured raised fowl species
- Stud cattle
- Truffles

## Q7 Please rank your agreement with the following statements:



### Insights and commentary

- 222 respondent answers.
- A very high level (73 percent) of respondents are experiencing barriers entering the business of agriculture.
- Interestingly, 54 percent of respondents agree (combined percentage of 'Agree' and 'Somewhat agree' responses) that they are very confident making business decisions, but only 38 percent think they have a very high level of business skill and knowledge. This suggests a mismatch between confidence and business skill/knowledge.

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## Q8 Thinking about the previous question, if you would like to provide more specific information, please use the space below.

This question was an optional open-ended question, which received 45 responses. Individual unedited responses to this question have been provided below. These unedited responses have been loosely grouped into themes.

Theme	Individual Response
Networks	Being involved in networks is crucial to my farming career as we all learn from each other
	Facebook is an invaluable tool to connect and reduce the sense of isolation.
	Hard to get to traditional meeting based info as lack of time and distance!
	I am moving out of the district which I grew up in (where I knew lots of young farmer due to school) to a different area and are unsure on how to meet other young people in agriculture
	I know there are other young farmers out there but I find it extremely hard to make the time to connect with them.
	Involved in many young farmer groups
	It is difficult to connect unless you have previous relationships in the community.
	It is very difficult to find useful connections in the industry as a young first generation farmer
	Living in an agricultural area i am surrounded by a number of farmers and agribusiness professionals
	More opportunities in small regional communities to network
	Networking is vital. Conferences, farm tours, industry meetings all create inspiration and reaffirm why we got into farming.
	Not many young farmer initiated events in this region
	Opportunities exist to take advantage and connect. More always welcomed and encouraged by me
	Opportunities to network with other young farmers outside of your industry. a professional event for all young farmers.
	Through people I know agents and through other farmers
	Currently starting a local farming group in Coolah
	There is definitely not enough information sharing among the agricultural community. A rising tide floats all boats.
Finance	Barrier to entry is 40% deposit required by banks. Business loan v Home loan problem.
	Being able to purchase property and plant
	biggest barriers are financial
	capital to invest in the business is our biggest challenge
	Finance is an issue in relation to equity!! Opportunity to engage in lease land as there is high competition for it!
	Having large issues attempting to purchase a small farm - due to commercial loan barriers
I'm only confident in business decisions if it's about farming not financial	

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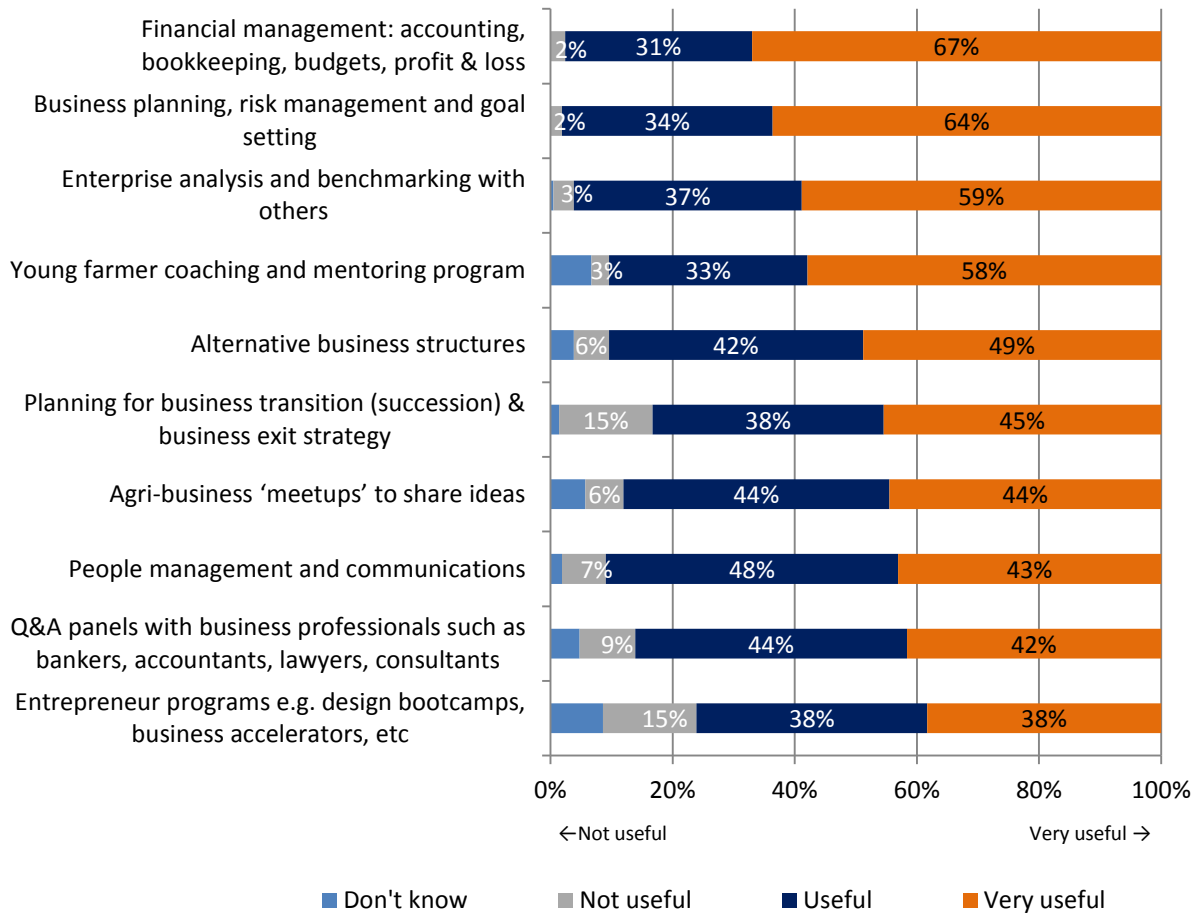
	Strong opposition from banks, they prefer corporates and overseas equity. Also little or no incentive from state Government.
	There needs to be more funding opportunities for younger people who are interested in getting into dairy farming and also more business mentoring programs for them as they start there new dairy businesses
	We are struggling to expand our small grazing enterprise as it's a struggle to afford to grow the farm without off farm income.
	Without having a property to inherit, the price of starting a primary production business, not only the price of the land, but the start-up costs for machinery, planting, purchasing stock is very prohibitive
	Carbon and biodiversity grants
Business	Advice direction hands on experience
	Business skill and knowledge developed over 20 years, I have accessed training to develop these skills. I think this is important for young farmers to develop their own skills to be self-reliant to some extent.
	I do not always have the necessary level of business skill or confidence but I do have access to good advice, and while new products and ideas aren't always written large, information is available once you know where to look.
	I don't feel I can confidently assess new business/expansion and mitigate risk
	So far everything we have looked into is geared towards larger scale or already well established farms making it difficult for new small scale
	We are still trying to move towards running our farm as a business and having a business plan. This is really hard to start!
Land	Access to affordable land is a massive barrier
	Barriers to entering ag - increasing land prices and competition from outside non-traditional ag investors
	Getting our land to start is proving to be our biggest hurdle
Other	Difficult accessing more training - TAFE or university because of cost, time, and relevance to my business
	Drought and inaccurate weather forecasts
	It's difficult finding my place in a family business
	Need any help that I can get with some of these!!
	There are opportunities however they clash with my full time job as a mechanic.
	This area much easier to access knowledge in, close proximity, diversity of ag in the area, also because I know how to source the information I want. The information is so fragmented, most people would not know where to start.
	Permaculture service offering: produce sales (Co-op farm gate), design, consultancy, aerial photography, tours, project management, pre-purchase property assessments

## Insights and commentary

- 45 responses
- The highest response themes for this question related to networks and finance.

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## Q9 How useful would the following learning opportunities be for your farming business or future farming business?



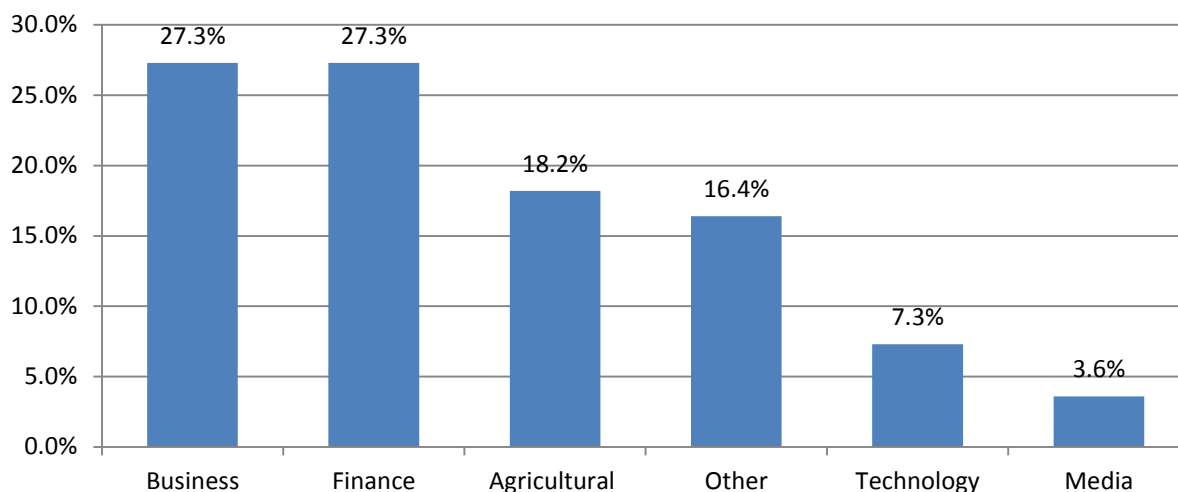
### Insights and commentary

- 209 respondent answers.
- Respondents provided a very strong response to all proposed learning opportunities.
- Top four 'Very useful' responses relate to financial management; business planning; enterprise analysis and benchmarking; and young farmer coaching and mentoring program.

# DPI YOUNG FARMERS SURVEY REPORT V1.2

## Q10 Are there any other learning opportunities that are vital to your farming business or future farming business in the next 6 to 12 months?

Survey respondents (55) provided a range of feedback to this question. When sorted into themes by WRI, the percentage of feedback relating to each theme can be viewed.



Individual responses have been provided below. These unedited responses have been loosely grouped into themes.

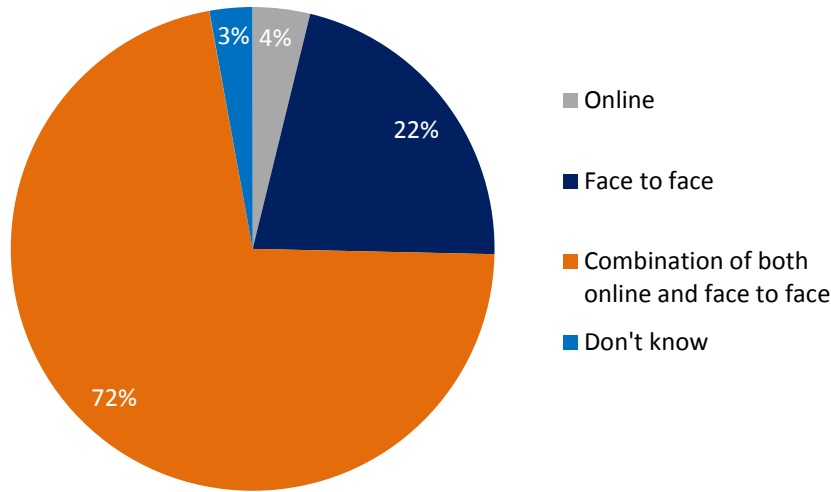
Theme	Individual Response
Business	yes marketing and insurance
	Talking to banks, brokering deals and expansion without labour ie new technology
	Have been struggling to find good benchmarking data for intensive mixed irrigation farms
	A workshop analysing agribusiness trends and key growth areas
	How to sell yourself, your vision, the elevator pitch
	Authoritarian standards of production and navigating industry requirements
	Fully understanding business literacy!!!
	Understanding farm based legislation changes Seems to be changes every week.
	I was part of leadership / mentoring program it was fantastic!
	Tourists and farm tours - how to organise farm tours and maximise returns
	Marketing, relationship building, and consumer education of a small scale or organic sector as a whole
	Marketing and tracing young farmers how to sell
	Insurance types
Business planning to start at farming business: start-up funds, debt servicing, cost of production, understanding markets specifications.	
Finance	How to gain the funds to buy a farm when are not inheriting land
	Establishing cash flow on a new farm, how to finance a new farm
	Learning how to persuade the banks that an agricultural business is a positive move
	Financial management
	I want to learn about alternative and innovative financial products that are available to support our business.

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	Accounting and learning about how ag and tax work together is a huge one!
	Capital raising - mentorship around this would be great
	Financial management and goal setting
	Capital raising!
	Bank ready seminar
	Bank ready - knowing and brokering best deals. Forward contract marketing opps.
	Taxation management
	Means of acquiring financials for start-up
	To be able to learn the best way to secure grants or funding.
	Information on getting access to equity outside of succession planning
	Income from small acre advice (intensive production)
	Not really, banks I find say one thing and actually actively go the other way
Agricultural	Niche specific workshops (e.g. holistic grazing)
	Mechanical training, machinery operation training
	Training with on farm duties (eg growing of crops)
	Getting the most out of wool
	DPI short courses on Queen Bee Artificial Insemination and Crop Pollination courses ran by the DPI.
	As we are moving to a new area, I'd like to be able to easily access help and support for local 'professionals' (eg. Land care, agronomists).
	Farm tours
	Yes TAFE does a cert2 in agriculture but I would like to do a school based traineeship cert 111 not available.
	Mechanics, fencing and other specific skills not gained if not raised on farm
	Indigenous foods
Other	There is never enough knowledge or learning everything helps
	Learning how to use existing programs that have not been utilised due to reluctance to change
	Not really
	Internship
	Not really, any of these would be helpful though
	Social licence, public perception
	Nil
Technology	Technology and innovation
	information technology
	Accurate weather outlook and decent internet and phone coverage
	Professional development - training in emerging tech
	Innovation opportunities
Media	We use a lot of webinars on various topics.
	Could some of these events be run out as webinar events and people could participate either at home or as a local group and connect with a wider audience across the state?



## Q11 How would you prefer to participate in these learning opportunities?

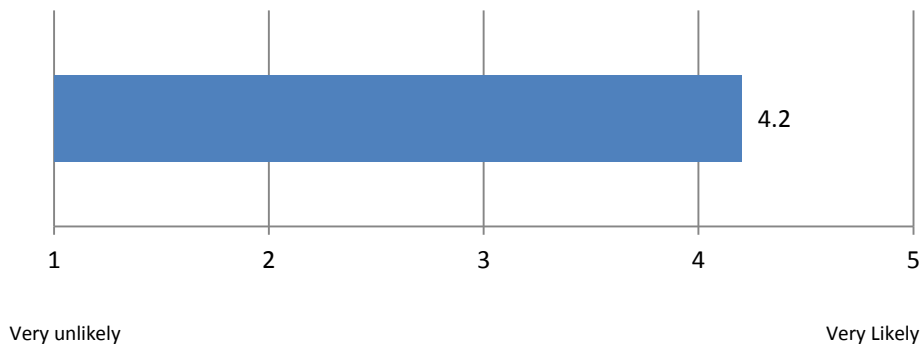


### Insights and commentary

- 209 respondent answers.
- A very small percentage of respondents (4 percent) prefer a purely online learning opportunity.

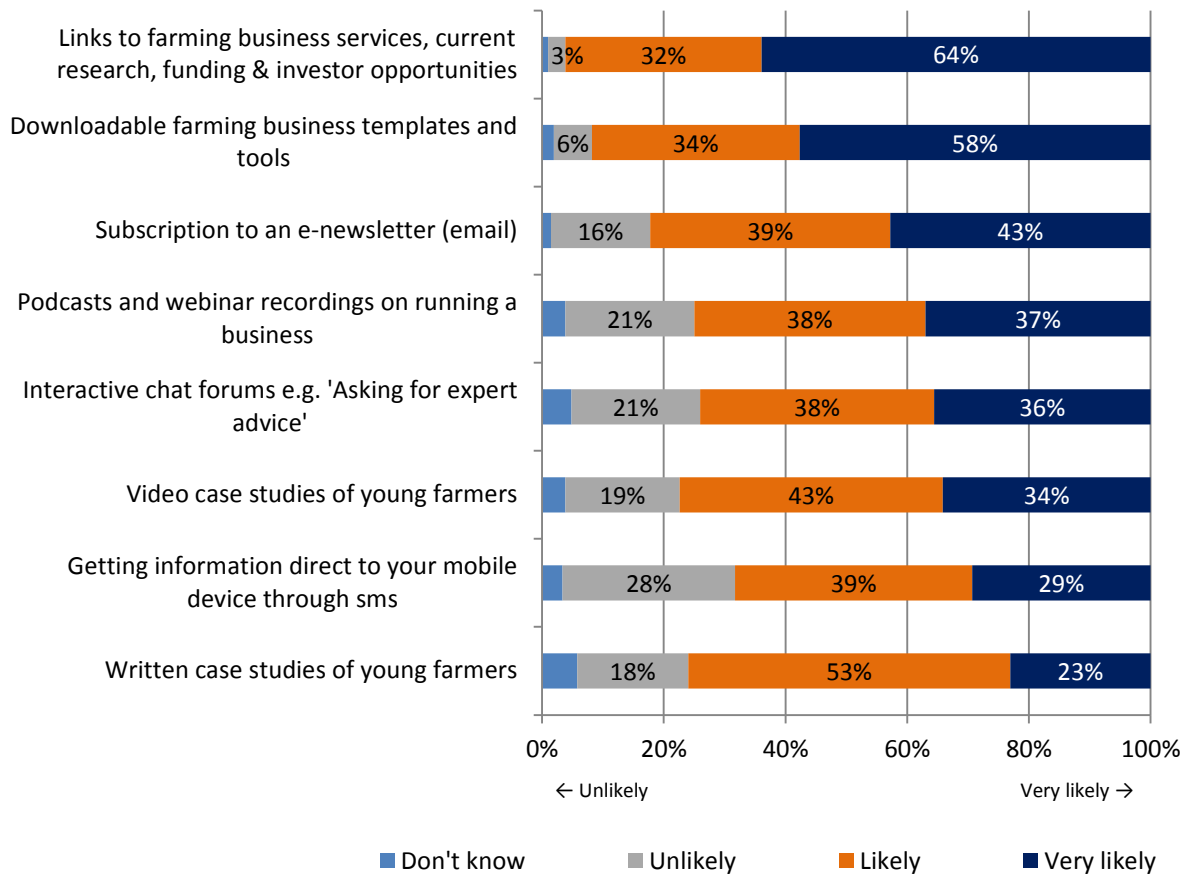
## Q12 How likely are you to use a 'one-stop-shop' website for business information?

Respondents were asked to answer this question on a sliding five point scale, where 1 was 'Very unlikely' and 5 was 'Very likely'. This question was answered by 209 respondents. The average response to this question was 4 out of 5, meaning that the average respondent was more likely to use a 'one-stop-shop' website for business information.



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## Q13 How likely are you to use the following online resources for your farm, or future farm business:



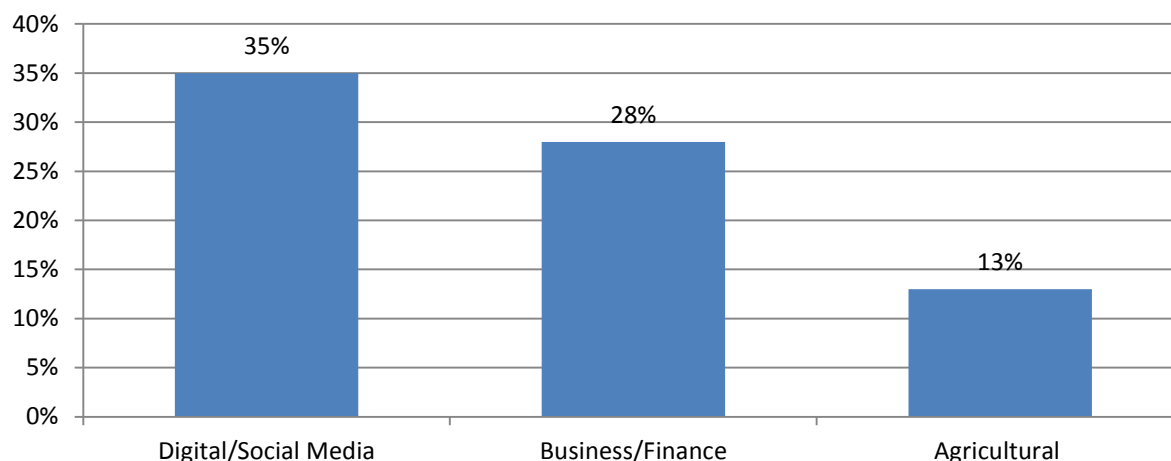
### Insights and commentary

- 208 respondent answers.
- The top two 'Very likely' responses relate to 'Links to farming business services, current research, funding & investor opportunities' and 'Downloadable farming business templates and tools'.
- There was an elevated 'Unlikely' response to 'Getting information direct to your mobile device through sms', although 68 percent still answered 'Likely' or 'Very likely'.

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## Q14 Are there any other online resources that are vital for your farming business or future farming business you think should be considered for the website?

Survey respondents (40) provided a range of feedback to this question. When sorted into themes by WRI, the percentage of feedback relating to each theme can be viewed.



Individual responses have been provided below. These unedited responses have been grouped into themes.

Theme	Individual Response
Digital / Social Media	Direct fb or twitter feed
	Facebook could be used to gain advice on various topics within an enterprise
	Facebook or instagram feeds
	I got to this link from the LLS newsletter posted on Facebook.
	Internet based forums are too hard to follow e.g I don't use twitter as to hard to follow
	More engagement from the YFBP on twitter
	Social media is vital to our business. Perhaps some way to plug into that and even some resources available for people to improve their social media marketing skills.
	I think the idea of an app encompassing platform to find information is great! Personally I use the Farm table currently
	Make an app too.
	Management and data recording apps that are easily accessible
	Maybe an app with access to all of the above
	I would HIGHLY value Webinars and podcasts
	Must be accessible whilst in the field, so podcasts are great. Examples of quality business plans, marketing plans, and grant applications would be useful.
Videos	
Business/Finance	capital raising assistance, investor-farmer meet up sessions
	Could part of the service be reviewing business plans and offering advice on where they could be improved? Links to recognised training opportunities.

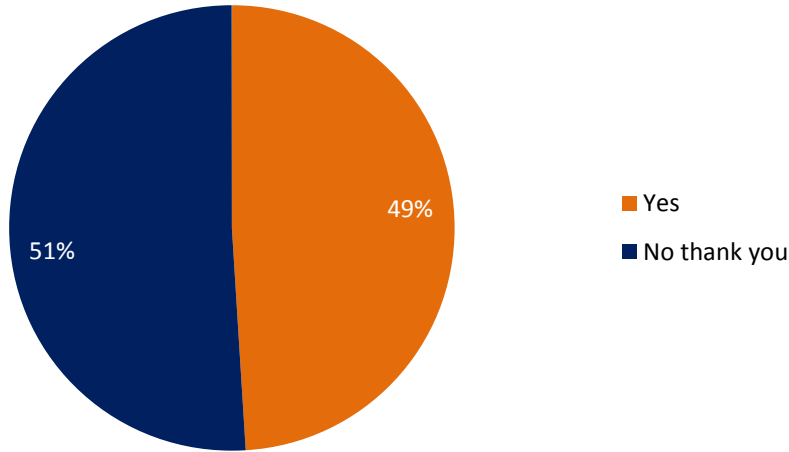
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	Establishing your first farm - steps to achieve this.
	Farm marketing channels and how to teach the right audiences
	Grant to help young farmers get started, we are finding it impossible
	Grants, loan helps etc.
	HR stuff
	Industry links
	Standard operating procedures for things like BAS which I'm trying to learn
	The AGbiz stuff from Business Queensland (QLD Govt) is pretty good.
	The Marketing plan/ prospectus to attract partners to your business
Agricultural	Agroecology + food sovereignty
	Local crop knowledge and info in-line with calendar and opportunity to ask an expert
	Resources such as stocking rates, and how much feed = %weight gain, easy tutorials with simple little tricks that can make farming maintenance easier, especially when working alone
	Seasonal animal/crop health issues identified by vets/agros
	Upgrade from cert 2 to cert3 in agriculture
	Not just conventional ag resources, but links to a wider variety of options
Other	General fact sheets or links them
	Internet and mobile service needed first. Then would like good weather forecasts!
	Not really. Young farmers really need to get the education first. this would answer most of your questions
	Online is great but please keep up the face to face too!
	Please check out <a href="http://www.thefarmtable.com.au">www.thefarmtable.com.au</a> . Respectfully request that you complement, rather than duplicate, with Airle's fantastic work.
	Short course training programs online
	Still no mobile service in farming area, would look at online and face to face info more than phone based apps etc.
	Whatever it is as long as step by step .... clear examples
	You have to have decent Internet to be able to use them so it makes it hard

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## Q15 Are you willing to participate in future phone interviews to assist us to better understand the needs of young farmers?

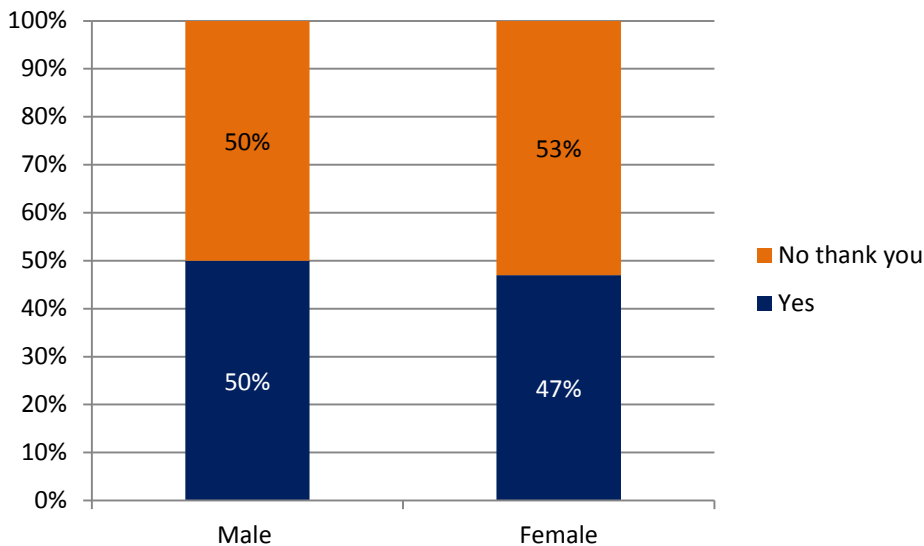
When asked if they were willing to participate in further interviews, 49 percent (98 respondents) advised that they were willing.



### Insights and commentary

- 200 respondent answers.

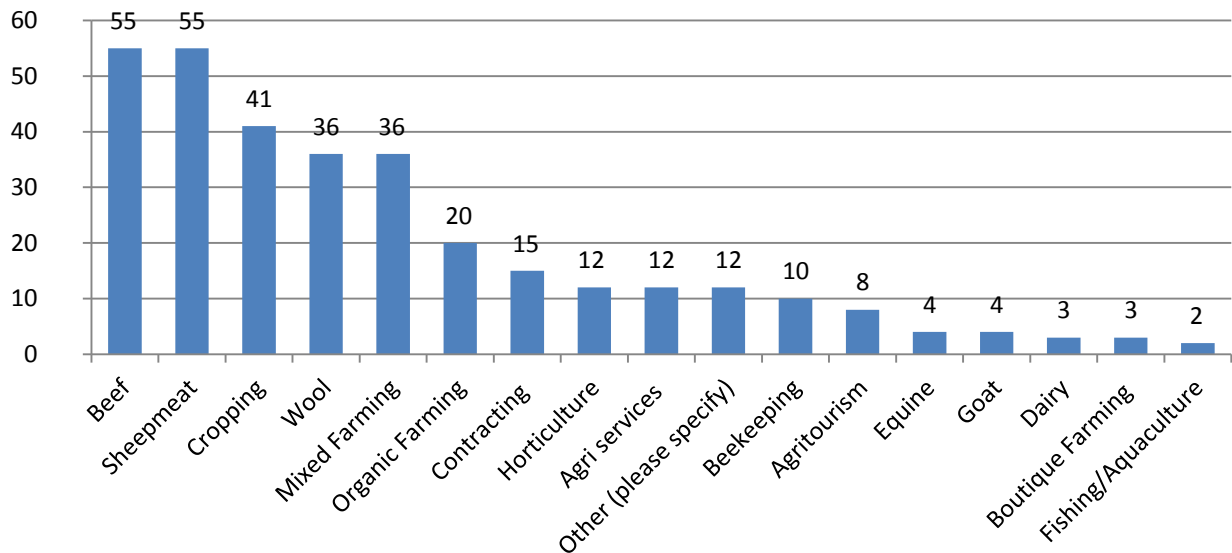
The breakdown of males (53 percent) and females (46 percent) who agreed/disagreed was approximately equal (one person did not nominate a gender).



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Willingness to participate in future interviews can also be broken down by industry. Where respondents were happy to be involved in future interviews, the table below shows this breakdown across industries.

It should be noted that of the 98 respondents who were willing to participate in future interviews, many respondents advised they were involved across multiple industries. The table below provides a count of respondents who advised that they were willing to take part in future interviews, in each industry. On this basis the, there is double counting of individual respondents.



The 12 'Yes' respondents in the 'other' category, are involved in the following industries:

- Free range Berkshire pig stud
- Free Range Pork
- Hay
- Irrigation
- Market Gardening
- Orchards
- Paddock to plate
- Pastured Poultry
- Poultry (Game Birds)
- Poultry meat and eggs
- Rice
- Transport, storage, marketing

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The following table breaks down the number of respondents willing to participate in future interviews, by Local Land Service area (LLS).

LLS Region	Yes Responses
Central Tablelands	8
Central West	10
Greater Sydney	4
Hunter	11
Murray	13
North Coast	12
North West	9
Northern Tablelands	4
Riverina	12
South East	11
Western	4
Total	98

## WESTERN RESEARCH INSTITUTE

WRI is a regional development research organisation located in Bathurst, New South Wales. WRI holds a wealth of knowledge on employment, business development and investment issues affecting regional Australia. It has worked with Commonwealth, State and Local Governments and industry groups on numerous investment and development programs in regional areas. WRI has strong credentials in business and commercial market consulting and applied economic modelling including input-output analysis, shift-share, agribusiness and regional socio-economic surveys and analysis.

### **Ms Wendy Mason - General Manager**

Wendy joined the WRI team as General Manager from her former position as Head of the Commonwealth Bank Foundation. Wendy has extensive management and business development experience, excellent networks, and a substantial track record in stakeholder relations across the government, financial and not-for-profit sectors; and experience as a major end-user of research to support best practice outcomes. Wendy has formal qualifications in education and psychology from the University of Sydney, a Graduate Certificate in Human Resource Management and Graduate Certificate in Business (Marketing).

### **Mr Alistair MacLennan – Senior Research Consultant BA Political Economy, First Class Honours (UNE)**

Having served in a variety of parliamentary, public service and private sector roles, Alistair brings a wealth of research experience to WRI. Alistair has well developed skills in data analysis, economics and business, and has a wide understanding of government. In addition, Alistair also has experience in policy development in the energy sector, where he engaged with industry, government agencies and NGOs to inform policy. Alistair's experience in engaging with clients, stakeholders and the public assists WRI to fully understand its clients' needs and provide tailored research.

### **Ms Kath Behrendt – Associate Research Consultant MEcSt, Grad Dip Ag.Econ, BFA (UNE)**

Kath has a professional background in agricultural economics, resource economics and financial administration. She has worked in the private, public and not-for-profit sectors and has extensive experience in agribusiness planning and development, economic and financial modelling, business case development, econometric analysis and small business management. Kath's strengths lie in bioeconomic modelling, benefit cost analysis, financial time series modelling and efficiency and productivity analysis. Kath is currently a Director and Treasurer on the Josephite Foundation Board and has extensive experience in not-for-profit governance, policy development and administration.

### **Ms Dale Curran – Executive Officer BA ANU**

Dale is responsible for all administrative processes at WRI including executive support, finance, management of the Board of Directors and maintenance of policies. She has worked in a variety of roles at WRI, including Fieldwork Supervisor and Research Assistant, and has worked on several community and business surveys. Dale brings a high level of organisational skill to her role as Executive Officer.



